

Viewing AMP Bank Loan Documents – docuPREP.

Broker & Adviser User Guide



Overview

This training guide serves as a reference and learning tool for AMP Bank Limited (AMP Bank) accredited Brokers and Advisers (Loan Originators), to obtain the knowledge and skills necessary to access and view their clients' AMP Bank loan documents from the First Mortgage Services (FMS) docuPREP system.

At the end of this guide you will be able to:

Find documents in docuPREP that can be viewed as part of the AMP Bank Loan Document Pack

Process Overview

Loan Originators responsibilities:

- For each Loan Document pack viewed, read and accept the Document Centre Terms and Conditions.

FMS responsibilities:

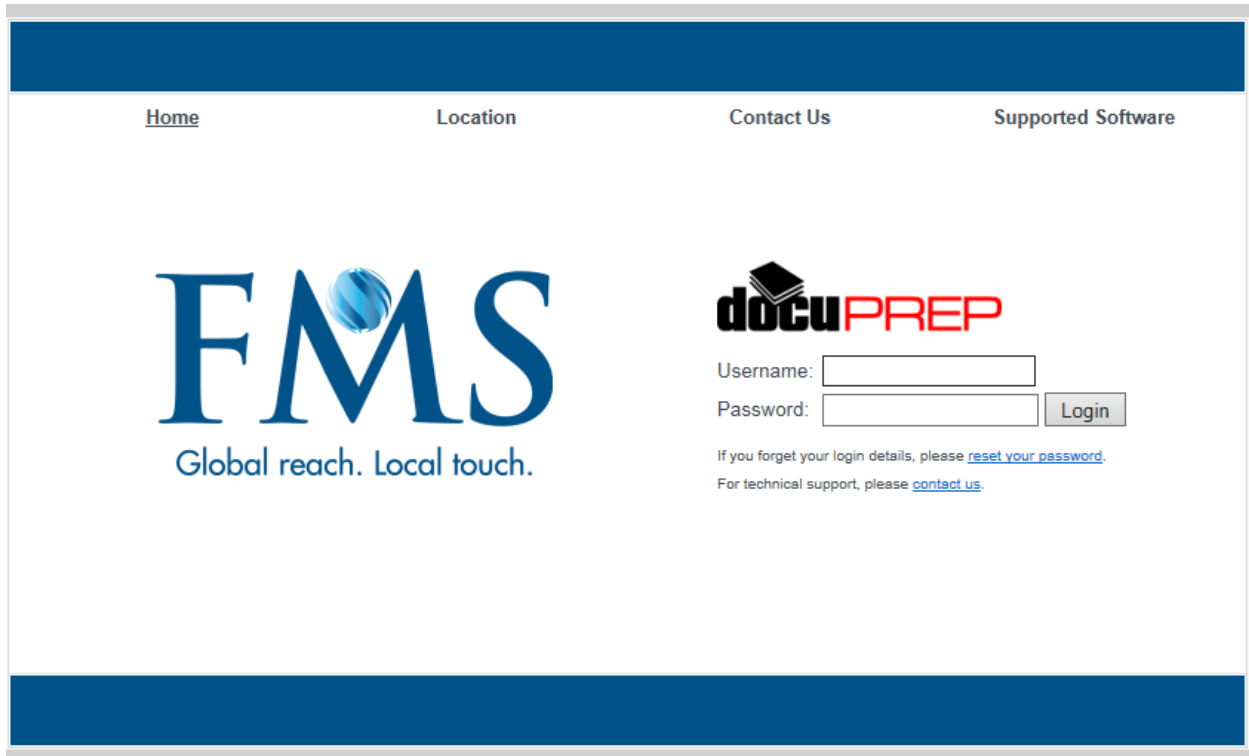
- Prepare Loan Documents and upload to Document Centre
- Send Loan Document Pack by Australia Post as per current process
- Add any updated version of documents to Document Centre (e.g. If Loan details change)
- Send updated version of documents via Australia Post as per current process
- Verify returned documents are all present and correct as per current process

If you require any additional assistance with document access please initially contact your AMP Bank BDM.

1. Login to docuPREP

Use your existing FMS docuPREP login details, provided by FMS on approval of your first loan with AMP Bank. If you have not received your login details please contact either your AMP Bank BDM or FMS on 1300 360 757

<https://docuprep.firstms.com/frontpages/clientservices.jsp>



Home Location Contact Us Supported Software

FMS
Global reach. Local touch.

docuPREP

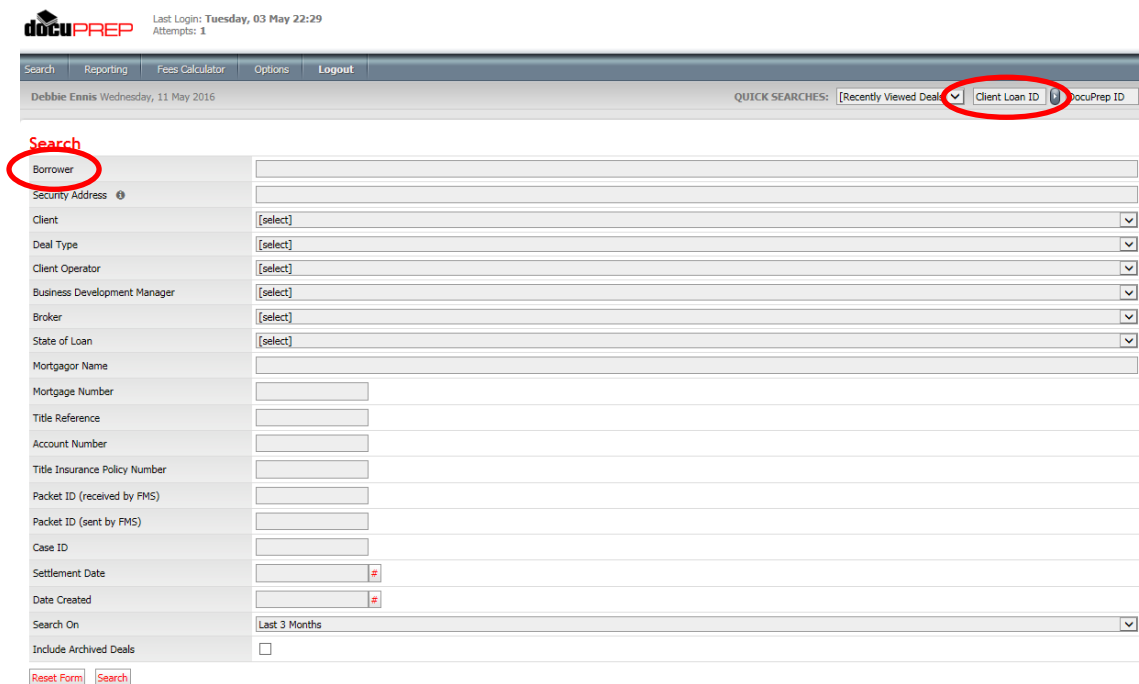
Username:

Password: Login

If you forget your login details, please [reset your password](#).
For technical support, please [contact us](#).

2. Locate Customer

Enter your customer details or loan reference to locate the deal once instructed.



docuPREP Last Login: Tuesday, 03 May 22:29
Attempts: 1

Search Reporting Fees Calculator Options Logout

Debbie Ennis Wednesday, 11 May 2016 QUICK SEARCHES: [Recently Viewed Deals] [Client Loan ID] [DocuPrep ID]

Search

Borrower

Security Address

Client [select]

Deal Type [select]

Client Operator [select]

Business Development Manager [select]

Broker [select]

State of Loan [select]

Mortgagor Name

Mortgage Number

Title Reference

Account Number

Title Insurance Policy Number

Packet ID (received by FMS)

Packet ID (sent by FMS)

Case ID

Settlement Date #

Date Created #

Search On Last 3 Months

Include Archived Deals

Reset Form Search

3. Access Document Centre

Go to the left hand menu and click on the Document Centre tab.

The screenshot shows a web interface with two main panels. The left panel, titled 'Deal Menu', contains a list of navigation options: Deal Summary ~ B1885253, Document Centre (circled in red), Notes, Loans, Basic Variable Rate LoanPrincipal & Interest \$223,969.79, Borrowers, Larissa Siew Imm Light, Mortgagors, Larissa Siew Imm Light, Guarantors, Creditors, Securities, 112/14 Everest Street WARNER QLD 4500, Term Deposits, Fees, Settlements, Funds, and Pending Items. The right panel, titled 'Milestone: Documents Sent - Purchase', displays a 'Deal Summary' table with the following details:

Deal Details	
Docuprep ID	B1885253
Client	AMP Bank Limited
Client Loan ID / WIN	126307
Lender	AMP Bank Limited
Lender Loan ID	
State	QLD
Funder	AMP Bank Limited
Client Operator	Meera Parthipan
Broker	Sam Toutsis
Channel	Broker Team
Deal Type	Purchase
Expected Settlement Date	25/05/2016
Date Modified	29 April 2016 1:47:02 PM

A message will now appear with a link to the Terms & Conditions for accessing and viewing customer documents. You **must** read and agree with the Terms & Conditions before the system will allow you into the Document Centre. Once you have agreed to the terms and conditions it will not appear on the same deal again.

The screenshot shows a dialog box titled 'Document Centre Terms & Conditions'. It contains the following text:

When you use docUPREP you agree to the following terms and conditions:

1. The documents included are available via docUPREP for viewing ONLY. (Note: the original documents have been sent to the borrowers by First Mortgage Services Australia Pty Ltd ("FMS");
2. You will NOT print the documents, and you acknowledge that any attempt to print the documents for execution by the borrower may lead to delays in settlement;
3. FMS and AMP Bank will not be liable for any delays in settlement or penalties, resulting from you printing the documents; and
4. You acknowledge and accept that your use of docUPREP indicates your acceptance of FMS's terms of use.





At the bottom of the dialog box, there is a button labeled 'I Agree'.

4. Viewing Loan Documents

The following document types will be available for you to view:





- Loan Pack
- Loan Pack – Mortgage
- Home Loan Application Summary
- Loan Agreement

Document Centre

Document Type	Document Name	Date Created	Source	State	Reconciled	Note	Obsolete
Filters N ▾							
- Unknown							
<input checked="" type="checkbox"/>	 Home Loan Application Summary	Home Loan Application Summary.pdf					N
<input type="checkbox"/>	 Loan Agreement	Loan Agreement.pdf					N
<input type="checkbox"/>	 Mortgage	Mortgage.pdf					N
<input type="checkbox"/>	 Loan Pack	Loan Pack.pdf					N

If a document has been superseded, you will see the same document numerous times in the Document Centre list, ensure you view the pack with the latest **date created**.

Document Centre

Document Type	Document Name	Date Created	Source	State	Reconciled	Note	Obsolete
Filters All ▾							
- Unknown							
	Loan Pack	Loan Pack 1588072.pdf					N
	Loan Pack - Change of Name	10CN.pdf					N
	Loan Pack - Mortgage	TAS Mortgage_1504641.pdf					N
	Loan Pack	Loan Pack.pdf					N

Showing 1 to 4 of 4 entries

The type of deal will depend on the documents available for viewing.

If no documents are available for viewing, check the following:

- Is the Milestone status at “Documents Sent” or further?** You will not be able to see any documents until the FMS Operator triggers the “Documents Sent” Milestone.

Deal Menu

- Deal Summary ~ B1885253
- Document Centre
- Notes
- Loans
 - Basic Variable Rate Loan Principal & Interest \$223,969.79
- Borrowers
 - Larissa Siew Imm Light
- Mortgagors
 - Larissa Siew Imm Light
- Guarantors
- Creditors
- Securities
 - 112/14 Everest Street WARNER QLD 4500
- Term Deposits
- Fees
- Settlements
- Funds
- Pending Items

Milestone: Documents Sent - Purchase

Deal Summary

Deal Details

Docuprep ID	B1885253
Client	AMP Bank Limited
Client Loan ID / WIN	126307
Lender	AMP Bank Limited
Lender Loan ID	
State	QLD
Funder	AMP Bank Limited
Client Operator	Meera Parthipan
Broker	Sam Toutsis
Channel	Broker Team
Deal Type	Purchase
Expected Settlement Date	25/05/2016
Date Modified	29 April 2016 1:47:02 PM

b. Is AMP Bank Limited the Lender? You will not be able to see documents for deals that are for other Lenders.

5. Further Assistance

For assistance with any system issues relating to docuPREP please contact FMS on 1300 360 757.

If you have any other queries relating to the loan or documents please contact either our Distributor Hotline on 1300 300 400 or your AMP Bank BDM.

Statement of confidentiality

The information contained within this document is confidential and proprietary to First Mortgage Services Australia Pty Ltd (FMS). It is submitted with the understanding that it will be held in strict confidence and will not be disclosed, duplicated or used, in whole or in part, without prior written consent from FMS.