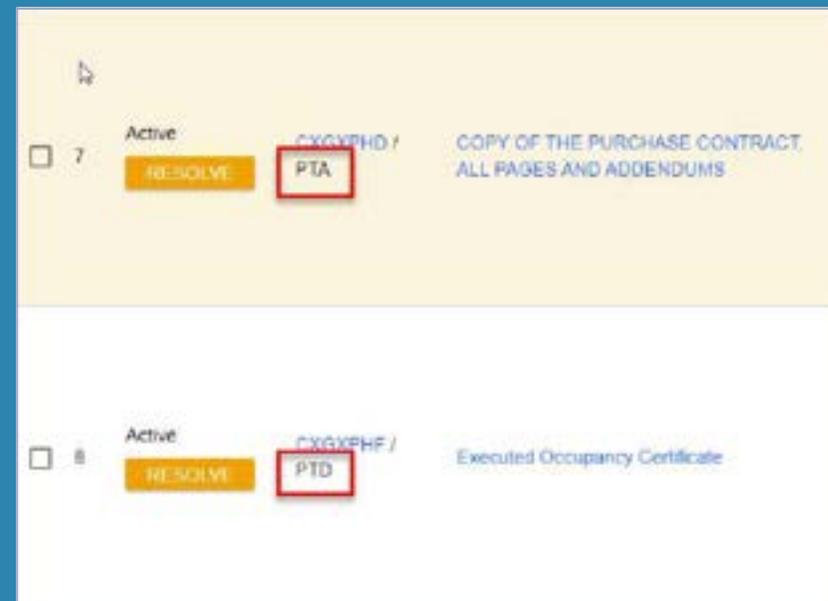
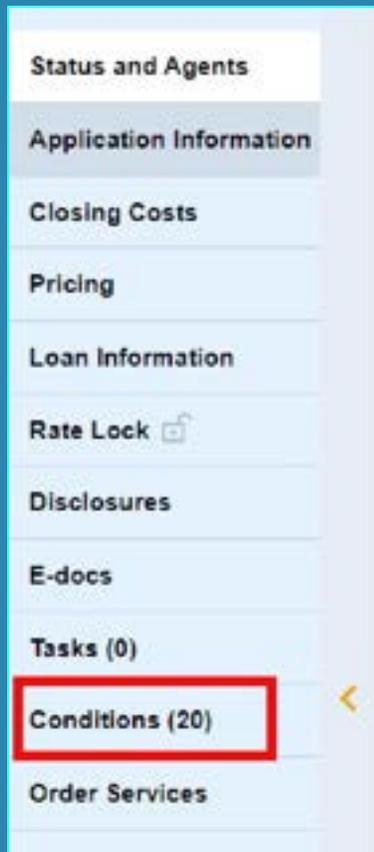




How To Submit to Initial Underwriting

When you have the necessary documents required for submission you can proceed with moving the loan into submission for Initial Underwrite. Select "Conditions" from the left side of your screen and a new window will open with the pre-populated conditions for the selected loan program (Conditions will generate according to which Doc Type was selected in Pricing) The documents required for submission will be listed as PTA under the Condition/Category. Anything marked PTD will be required to obtain the Clear to Close but can be uploaded now as well.





To upload a condition, find the desired condition in the conditions list and you can then drag and drop from your computer or select to upload a file and find it in your documents.

Once you upload a document a new window will pop up and you will select Doc Type from list. It does not really matter what you select here, We re-classify it once it get uploaded.

Select a Doc Folder

Search for: SEARCH

Choose a Doc Folder:

Folder
11 APPRAISAL
12 DISCLOSURES
13 PRE CLOSING DOC REQUEST
15 ORIGINATOR LOCK CONFIRMATION
21 TPO
GENERATED DOCUMENTS
LENDINGQB
UNCLASSIFIED



Select a Doc Type

Folders > 21 TPO

Search for: SEARCH

Choose a Doc Type:

Doc Type
FHA/VA/USDA CASE # REQUEST
INITIAL CREDIT PACKAGE UPLOAD
INITIAL LOAN ESTIMATE
SUSPENSE CONDITIONS
TPO APPRAISAL
TPO INITIAL DISCLOSURES
UW CONDITIONS

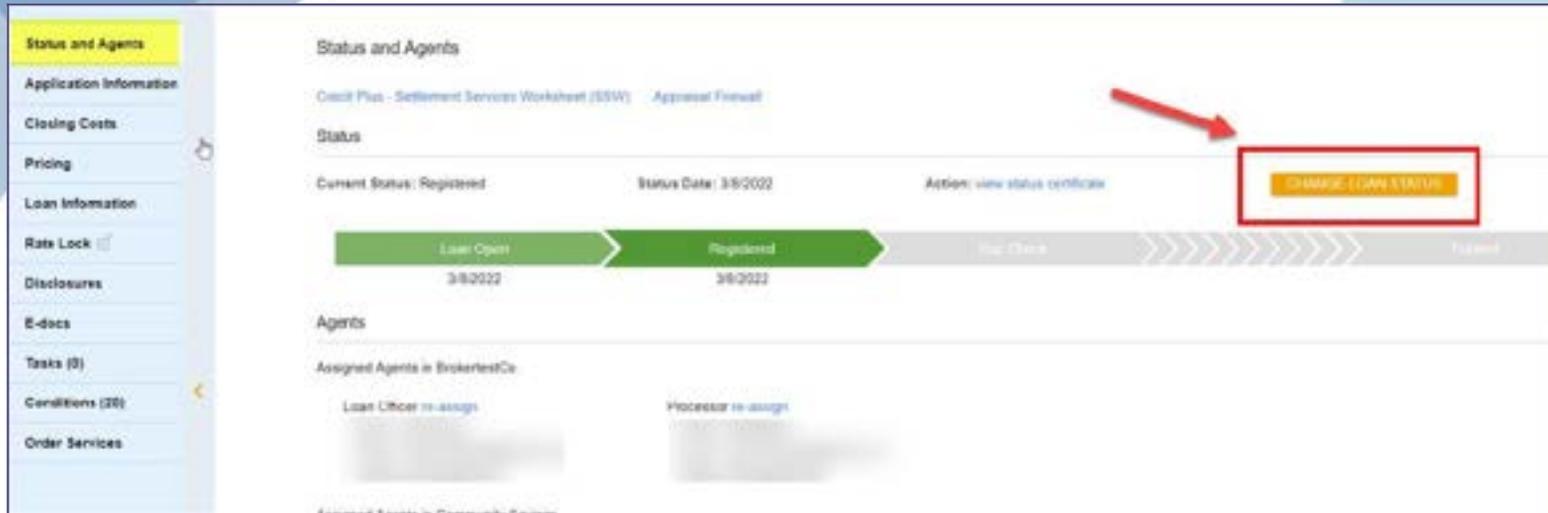
The screenshot shows a task card on the left with the following details: 'Active' status, a 'RESOLVE' button, and a task description: 'COMPLETE CHECKING ACCOUNT STATEMENTS FROM THE MOST RECENT 2 MONTHS SHOWING SUFFICIENT FUNDS TO CLOSE AND 6 MONTHS RESERVES'. The task is assigned to 'DBQLSWW / PTA' and was 'Opened and assigned by Jeff Broker 1/4/2023 10:49 AM PT'. On the right, there is an 'Association:' section with a red arrow pointing to the 'GENERATED DOCUMENTS - INITIAL DISCLOSURE' document, which is dated '02/03/2023' and assigned to 'Jeff Broker'. Below this is a file upload area with a dashed border, containing the text 'Drag and Drop Files Here' and 'Files to Upload (Max 12)', along with a 'OR SELECT FILES TO UPLOAD' button.

You will see the document has been linked to that condition. You can upload up to 12 documents to one condition at a time.

Repeat this process for all conditions that are required for submission (anything that is PTA) and any other conditions you would like to have reviewed at this time.

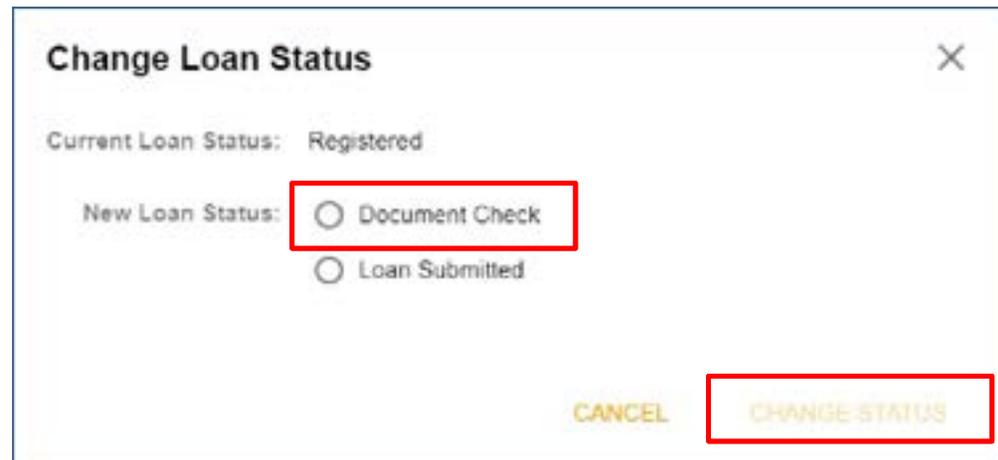
The “resolve” on the left side you do not have to worry about, this does not affect anything.

Once you have uploaded and resolved all conditions click on “Status and Agents” on the left hand side and select “Change Loan Status”



The New Loan Status will be “Document Check” and select Change Status.

Please Note: Document Check and Loan Submitted are basically the same thing, we just use the Document Check status.



The Jr Underwriter assigned to the loan will receive notification that you have submitted this file and will review the documents. After review the Jr Underwriter will either push the loan to Underwriting or reach out to you if documents are missing. Nothing further is needed from you at this point in





Contact Us

- If you have any questions, please reach out to your Junior Underwriter for assistance.

