





# 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.

Status and Agents
Application Information
Closing Costs
Pricing
Loan Information
Rate Lock 
Disclosures
E-docs
Tasks (0)
<b>Conditions (20)</b>
Order Services

<input type="checkbox"/>	7	Active		 CXGXPHD /	COPY OF THE PURCHASE CONTRACT, ALL PAGES AND ADDENDUMS
<input type="checkbox"/>	8	Active		 CXGXPHF /	Executed Occupancy Certificate

☐ 3

Active

CXGLNH7 /  
PTD

Opened and assigned by Jeff Broker 3/8/2022 8:41 AM PT  
[view all](#)

Requirement: None

Association: None

04/07/2022  
Jeff Broker

[associate previously uploaded](#)

Drag and Drop Files Here

Files to Upload (Max 12):

OR SELECT FILES TO UPLOAD

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 the appropriate Doc Folder and then Doc Type . You can search for a specific folder or Select the Folder then Doc Type.

Select a Doc Folder

Search for:  SEARCH Q

Choose a Doc Folder:

Folder

02 IDENTITY VALIDATION

05 CREDIT

07 INCOME

08 ASSETS

09 RENTAL/LEASE PROPERTIES

10 SUBJECT PROPERTY

11 APPRAISAL

12 DISCLOSURES

15 ORIGINATOR LOCK CONFIRMATION

21 TPO

GENERATED DOCUMENTS



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Choose a Doc Folder:

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GENERATED DOCUMENTS

Next you will select “Upload Document” in the bottom right corner. This will finish uploading and attaching the document to the condition.

Upload Docs

Condition

Category

Subject

Required DocType

DDG7MNK

PTA

IF P&L INCOME TYPE PLEASE PROVIDE A SIGNED AND DATED CPA PREPARED PROFIT AND LOSS STATEMENT COVERING THE MOST RECENT 12 MONTHS.

None

Please select document(s) to upload and associate with this condition.

File Name

Doc Type

Description

Application

Condition

21 TPO : UW CONDITIONS

Andy America

1.pdf

Type

remove

CANCEL

UPLOAD DOCUMENT

2

Active

RESOLVE

D9KL6WW / PTA

COMPLETE CHECKING ACCOUNT STATEMENTS FROM THE MOST RECENT 2 MONTHS SHOWING SUFFICIENT FUNDS TO CLOSE AND 6 MONTHS RESERVES

Opened and assigned by Jeff Broker 1/4/2023 10:49 AM PT  
view all

Requirement: None

Association:

unlink

GENERATED DOCUMENTS : INITIAL DISCLOSURE

02/03/2023  
Jeff Broker

associate previously uploaded

Drag and Drop Files Here

Files to Upload (Max 12):

OR SELECT FILES TO UPLOAD

Requirement: None

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”

Status and Agents

Credit Plus - Settlement Services Worksheet (SSW) Appraisal Firewall

Status

Current Status: Registered Status Date: 3/8/2022 Action: [view status certificate](#)

**CHANGE LOAN STATUS**

Loan Open 3/8/2022 Registered 3/8/2022 Doc Check Funded

Agents

Assigned Agents in BrokertestCo.

Loan Officer [re-assign](#) Processor [re-assign](#)

Assigned Agents in Community Savings

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.

Change Loan Status

Current Loan Status: Registered

New Loan Status: ☒ Document Check ☐ Loan Submitted

CANCEL **CHANGE 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.

