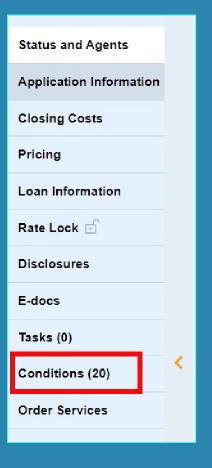
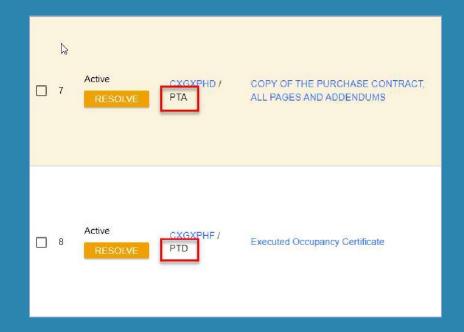




## How To Submit to Initial Underwriting



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.



-				Requirement: None	
3	Active RESOLVE	CXGLNH7 / PTD	Opened and assigned by Jeff Broker 3/8/2022 8:41 AM PT view all	Association: None C associate previously uploaded Files to Upload (Max	04/07/2022 Jeff Broker
				Orag and Drop Files Here     Files to Upload (Max     OR SELECT FILES TO UPLOAD	(12):

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	Select a Doc Folder	
Search for: SEARCH Q	Search for:	
Choose a Doc Folder:	Choose a Doc Folder:	
Folder	Folder	
02 IDENTITY VALIDATION	02 IDENTITY VALIDATION	
05 CREDIT	05 CREDIT	
07 INCOME	07 INCOME	
08 ASSETS	08 ASSETS	
09 RENTAL/LEASE PROPERTIES	09 RENTAL/LEASE PROPERTIES	
10 SUBJECT PROPERTY	10 SUBJECT PROPERTY	
11 APPRAISAL	11 APPRAISAL	
12 DISCLOSURES	12 DISCLOSURES	
15 ORIGINATOR LOCK CONFIRMATION	15 ORIGINATOR LOCK CONFIRMATIO	N
21 TPO	21 TPO	
GENERATED DOCUMENTS	GENERATED DOCUMENTS	

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

	2 Category	Subject			Required Doc	сТуре
DDG7MNK	PTA	IF P&L INCOME TYPE PLEASE PF PREPARED PROFIT AND LOSS S RECENT 12 MONTHS.			None	
	t documo	ot(c) to unload and accordate with	this condition			
Please select	t documer Doc Ty	nt(s) to upload and associate with <b>pe</b>	this condition. Description	Applicat	ion	
	Doc Ту	pe D: UW CONDITIONS change Doc				nove



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 Application Information Closing Costs	n "Ihn	Status and Agents Credit Plus - Settlement Services Worksheet (SSW) Appraisal Firewall Status					
Pricing	0	Current Status: Registered	Status Date: 3/8/2022	Action: view status certificate	CHANGE LOAN STA	<b>STUS</b>	
Loan Information							
Rate Lock 🖻		Loan Open	Registered	Duc Check		Funded	
Disclosures		3/8/2022	3/8/2022				
E-docs		Agents					
Tasks (0)		Assigned Agents in BrokertestCo.					
Conditions (20)	<	Loan Officer re-assign	Processor re-assign				
Order Services							
		Accianad Agonto in Community Savingo					

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

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

Change Loan Status X							
Current Loan Status: Registered							
New Loan Status:	O Document Check	]					
	O Loan Submitted	-					
		CANCEL	CHANGE STAT	US			

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





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

