



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)
- Conditions (20)**
- Order Services

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

Requirement: None

Active CXGLNH7 / [blurred] Opened and assigned by Jeff Broker 3/8/2022 8:41 AM PT
RESOLVE PTD [view all](#)

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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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 1.pdf	21 TPO : UW CONDITIONS Type	<input type="text"/>	Andy America 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 02/03/2023 Jeff Broker
DISCLOSURE

[associate previously uploaded](#)

Drag and Drop Files Here Files to Upload (Max 12):
[OR SELECT FILES TO UPLOAD](#)

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.

