

How to Submit

Submitting Loans

1. In the web portal, click New File.



2. To import a Fannie Mae File, select "Import Fannie Mae File"

Select **Choose File** to upload Fannie Mae File.

Select your Company's Organization. Select Template File.

Select the LO username (i.e BXXX-XXX). Select Loan Processor as Kevin.Youn.

Once everything is filled in, click

Create New File

3. To create a file from scratch, select "Create File From Scratch".

Select your Company's Organization. Select Template File.

Select the LO username (i.e BXXX-XXX). Select Loan Processor as Kevin.Youn.

Fill in borrower's information

Once everything is filled in, click

Create New File

4. Once created, you will be at the Home Page. Please fill in all necessary information. Select Save at the bottom of the screen

The screenshot shows a complex web form for loan application. It is divided into several sections:

- Status:** Includes fields for Loan Status (Set Up 01/24/2019), Follow Up Flag, Agency Case No, and Case No. Assigned.
- Critical Dates:** Includes Application Date, Sched Approval Date, Sched Closing Date, and Signing Date and Time.
- Borrowers:** A section for adding or deleting borrowers, with a callout indicating it needs to be filled out.
- Subject Property Info:** Includes fields for Property TBD, Street, City, State, Zip, County, No. Units, Property Type, Assessor's Parcel No, and Assessed Value. A callout points to this section.
- Loan Info:** Includes fields for Occupancy (Primary Residence), Purpose of Loan (Purchase), Loan Program Code, Loan Program Name, Mortgage Type, Jumbo, Amortization Type, Buydowns, Term, Due In / Balloon Term, Interest Rate, and Interest Only Term. A callout points to this section.
- Registration and Lock Info:** Includes Date Registered, Lock Days (30), Lock Extensions, Date Locked, Lock Exp. Date, Floating, and Lock Canceled Date.
- Appraised Value:** Includes fields for Appraised Value, Pur. Price / Est. Value, Base Loan, PMI Type, MIP Percent, Loan with MIP/FF, MIP/FF Paid in Cash, MI Prem./Annual Prem, Monthly MI Premium (yrs 11-30), Escrow Waiver, and First Time Homebuyer.

5. After saving, please go to 1003 page 1, 2, and 3. Please fill out all necessary information. Make sure to "Save" at each page before moving to the next page.

6. To upload documents, go to "Stored Documents" and click "Upload Documents".

The screenshot shows a sidebar menu on the left with 'Stored Documents' highlighted. The main content area is titled 'Document Images' and contains an 'Upload Document' button. A red callout points to this button with the text 'Click here to upload documents!'.

Then click browse and choose the correct file. You can select multiple files by holding down control or shift.

****NOTE:** In order to expedite the submission process please save each document type separately and name the file accordingly.

Ex: Initial 1003, Chase #XXX bank Stmt, Primary mtg Stmt, Subject EOI, etc.

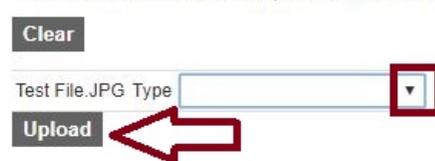
Upload Document

Press Browse to select files to upload. You can select multiple files by pressing control or shift.



Upload Document

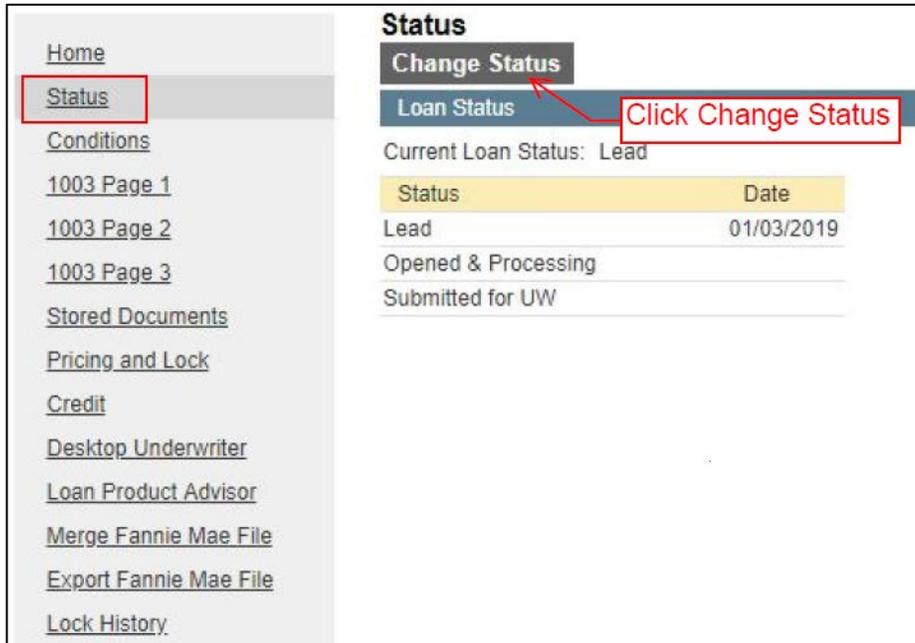
Press Browse to select files to upload. You can select multiple files by pressing control or shift.



THIS IS AN IMPORTANT STEP!

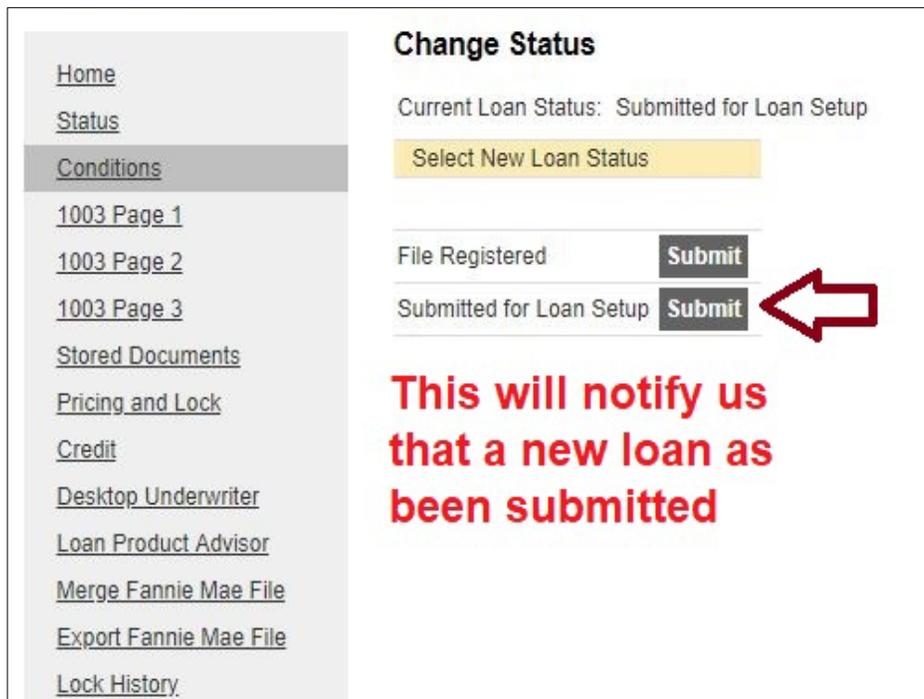
7. After filling out all necessary information, please go to “Status” and click “Change Status”. Then click “Submit” next to “Submitted for Loan Setup”.

It is very important you follow this at the last step. This Status change will notify us that a new file has been submitted.



The screenshot shows a navigation menu on the left with 'Status' highlighted. The main content area is titled 'Status' and has a 'Change Status' button. Below it is a 'Loan Status' section with a red box around it and an arrow pointing to it with the text 'Click Change Status'. Underneath, it says 'Current Loan Status: Lead' and displays a table with two columns: 'Status' and 'Date'.

Status	Date
Lead	01/03/2019
Opened & Processing	
Submitted for UW	



The screenshot shows the 'Change Status' page. The 'Current Loan Status' is 'Submitted for Loan Setup'. There is a yellow button labeled 'Select New Loan Status'. Below this, there are two rows, each with a status label and a 'Submit' button. A red arrow points to the 'Submit' button for 'Submitted for Loan Setup'.

This will notify us that a new loan as been submitted



How to Upload Conditions

WHOLESALE MORTGAGE BANKERS

Uploading Conditions

1. Sign into the WMB Web Portal and go into the correct file in the pipeline. On the left-hand side, click "Conditions". You will see an upload link next to each condition. Click "Upload".

Home Status Conditions 1003 Page 1 1003 Page 2 1003 Page 3 Stored Documents	<p>Conditions</p> <p>PTD</p> <table border="1"> <thead> <tr> <th>Type</th> <th>No</th> <th>Responsibility</th> <th>Description</th> <th>Date Received</th> <th>Date Cleared</th> <th>Documents</th> </tr> </thead> <tbody> <tr> <td>APPL</td> <td>103</td> <td>Loan Processor</td> <td>1003 Initial Loan Application - complete, signed/dated by all borrowers and MLO</td> <td></td> <td>01/25/2019</td> <td>Upload</td> </tr> <tr> <td>CREDIT</td> <td>211</td> <td>Loan Processor</td> <td>LOE for all credit inquiries within last 90 days including -</td> <td></td> <td>02/07/2019</td> <td>Upload</td> </tr> </tbody> </table>	Type	No	Responsibility	Description	Date Received	Date Cleared	Documents	APPL	103	Loan Processor	1003 Initial Loan Application - complete, signed/dated by all borrowers and MLO		01/25/2019	Upload	CREDIT	211	Loan Processor	LOE for all credit inquiries within last 90 days including -		02/07/2019	Upload
Type	No	Responsibility	Description	Date Received	Date Cleared	Documents																
APPL	103	Loan Processor	1003 Initial Loan Application - complete, signed/dated by all borrowers and MLO		01/25/2019	Upload																
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Upload Document

Press Browse to select files to upload. You can select multiple files by pressing control or shift.

[Browse](#)



Upload Document

Press Browse to select files to upload. You can select multiple files by pressing control or shift.

[Clear](#)

Test File.pdf Type

[Upload](#)



2. After you have uploaded ALL conditions, on the left hand side, click "Status".

Home Status Conditions 1003 Page 1 1003 Page 2 1003 Page 3 Stored Documents Pricing and Lock Credit Desktop Underwriter Loan Product Advisor	<p>Change Status</p> <p>Current Loan Status: Funded</p> <p>Select New Loan Status</p> <p>Conditions Submitted Submit</p>
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Change the Status to "Conditions Submitted".

This will notify us that all conditions have been submitted and are ready for review.