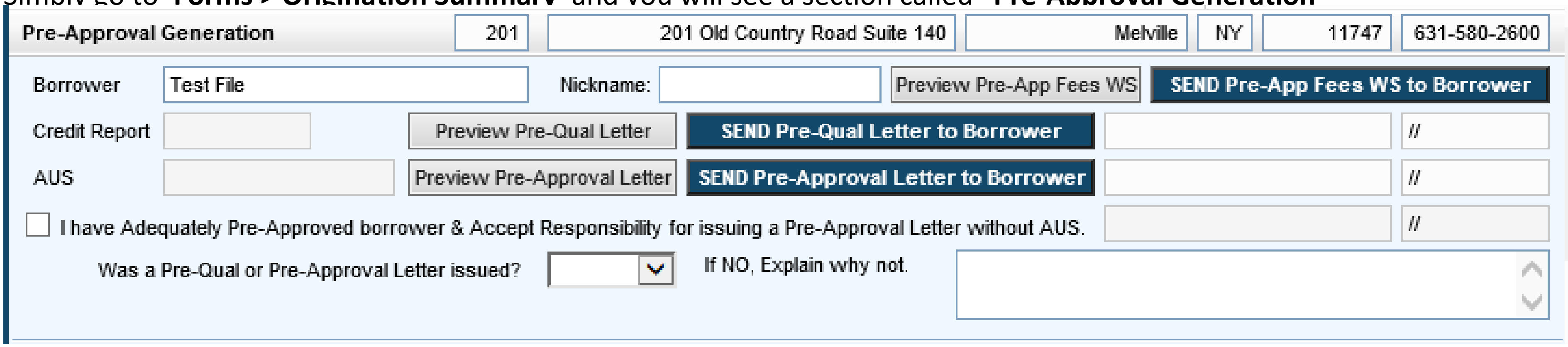
How to send a new Prequal and Pre-Application Worksheet

Simply go to '**Forms > Origination Summary**' and you will see a section called "**Pre-Approval Generation**"



- 'Preview Pre-App Fees WS' – Automatically prints the Pre-Application Fees Worksheet to the eFolder (titled Pre Application Fees Worksheet) if you want to review it first.
- 'SEND Pre-App Fees WS to Borrower' – Same as above, but also **generates an email** to the borrower through Outlook, and attaches the Pre Application Fees Worksheet to the email. Populates the Name and Date of the user that sent the Pre-App Fees WS. **=> quick, easy, no steps**

Pre-Qual Letter

- 'Preview Pre-Qual Letter' – Checks for Credit Report, checks Region, determines which version to use, automatically prints the Pre-Qualification Letter to the eFolder (titled Pre-Qual Letter).
- 'SEND Pre-Qual Letter to Borrower' – Same as above, but also generates an email to the borrower through Outlook, and attaches the Pre-Qual Letter to the email. Populates the Name and Date of the user that sent the Pre-Qual Letter. **=> quick, easy, no steps**

Pre-Approval Letter

- 'Preview Pre-Approval Letter' – Checks for Valid AUS or Attestation, automatically prints the Pre-Approval Letter to the eFolder (titled ***US Mortgage TBD PreApproval Letter)
- 'SEND Pre-Appr Letter to Borrower' – Same as above, but also generates an email to the borrower through Outlook, and attaches the ***US Mortgage TBD PreApproval Letter to the email. Populates the Name and Date of the user that sent the Pre-Approval Letter. **=> quick, easy, no steps**

For Compliance

Two benefits: (1) All of these actions automatically populate the HMDA/NMLS info for Inquiry or Pre-Qualification, and (2) This will ensure that only standardized and reportable documents are sent to the Borrower. We simply cannot have people send docs to the consumer outside of encompass – full stop.

IMPORTANT NOTE

By doing this, we will be disabling the ability to send these documents the old fashioned way, e.g. going into the Print Icon, Custom Forms, Looking in Sales, Finding the form, Printing it, Attaching it to your email and Sending it. Phew I got tired just typing this.

Last Cool Thing

We are going to be adding these pre-qual and pre-approval date stamps to our Business Intelligence system so we can measure pull through activity in a more complete fashion – that whole waterfall from credit pull > pre-qual/pre approval > docs out > docs back > closing. This will help projections and management of performance for everyone. I am super excited about this piece (and I know Steven is too).