

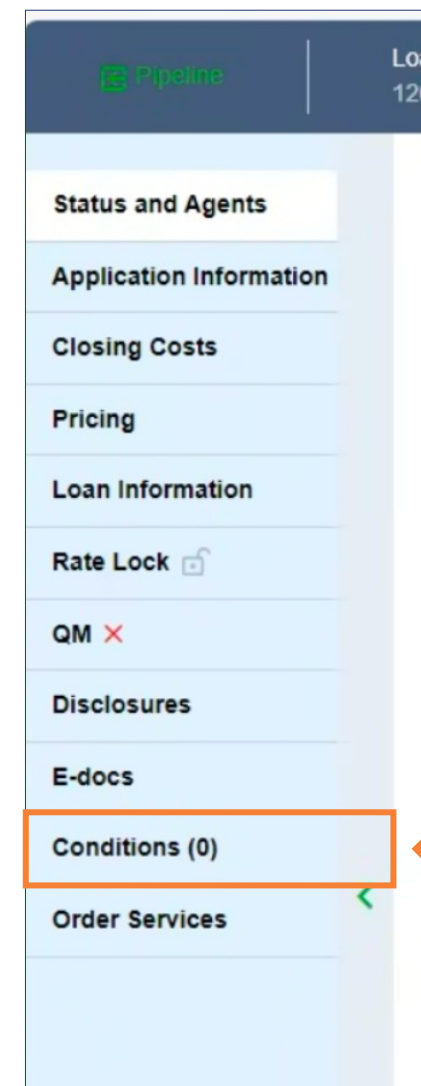
# How To Submit to Initial Underwriting



## How to Submit to Initial Underwriting

### Initial Underwrite

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.



## Upload Condition

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.



The screenshot displays a web interface for managing conditions. On the left, a list of conditions is shown. The first condition is selected, with a checkbox and the number '5'. It is labeled 'Active' and has a green 'RESOLVE' button. The condition name is 'DJLPWCN / PTA' and the description is 'COPY OF THE FULLY EXECUTED PURCHASE CONTRACT, ALL PAGES AND ADDENDUMS'. It was 'Opened and assigned by Nancy Perkins 9/4/2024 10:14 AM PT' and has a 'view all' link.

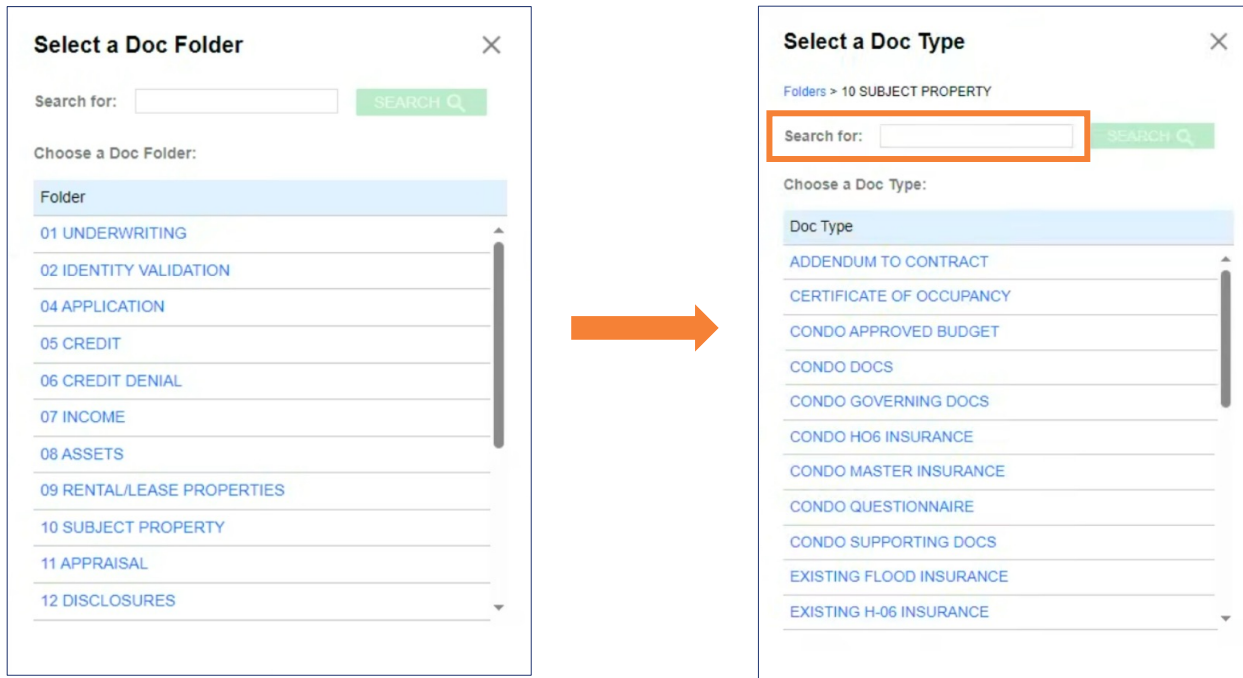
On the right, a detailed view of the condition is shown. It includes the following information: 'Requirement: None', 'Association: None', and '10/04/2024 Jeff Broker'. There is a link to 'associate previously uploaded' files. A dashed box highlights the upload area, which contains the text 'Drag and Drop Files Here' and 'Files to Upload (Max 12):'. Below this is a green button labeled 'OR SELECT FILES TO UPLOAD'. An orange arrow points from the 'view all' link in the list to the highlighted upload area.



# How to Submit to Initial Underwriting

## Doc Folder and Doc Type

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.



## How to Submit to Initial Underwriting

### Upload Document

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
DJLPWCN	PTA	COPY OF THE FULLY EXECUTED PURCHASE CONTRACT, ALL PAGES AND ADDENDUMS	None

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

File Name	Doc Type	Description	Application	Status	
USPS.pdf	10 SUBJECT PROPERTY : ADDENDUM TO CONTRACT <a href="#">change Doc Type</a> ✓	<input type="text"/>	Nancy Perkir ▾	<input type="text"/>	<a href="#">remove</a>

[CANCEL](#) [UPLOAD DOCUMENT](#) ←

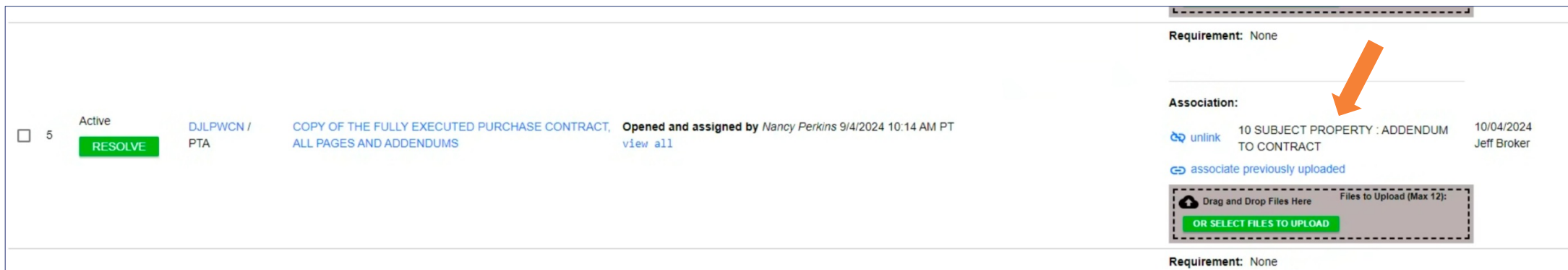


# How to Submit to Initial Underwriting

## Upload All Conditions

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.



The screenshot displays a document entry in a table and a detailed view of the document's association and upload options.

<input type="checkbox"/>	5	Active	DJLPWCN / PTA	<a href="#">COPY OF THE FULLY EXECUTED PURCHASE CONTRACT, ALL PAGES AND ADDENDUMS</a>	Opened and assigned by <i>Nancy Perkins</i> 9/4/2024 10:14 AM PT <a href="#">view all</a>
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**Requirement:** None

**Association:**

- [unlink](#) 10 SUBJECT PROPERTY : ADDENDUM TO CONTRACT 10/04/2024 Jeff Broker
- [associate previously uploaded](#)

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

**Requirement:** None



# How to Submit to Initial Underwriting

## Loan Status

Once you have uploaded and resolved all conditions click on “Status and Agents” on the left hand side and select “Change Loan Status”

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.

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 BrokerfestCo.

Loan Officer re-assign Processor re-assign

Assigned Agents in Community Savings

Change Loan Status

Current Loan Status: Registered

New Loan Status:  Document Check  Loan Submitted

CANCEL CHANGE STATUS



# Contact us to learn more!

The Junior Underwriter assigned to the loan will receive notification that you have submitted this file and will review the documents. After review the Junior 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.

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

