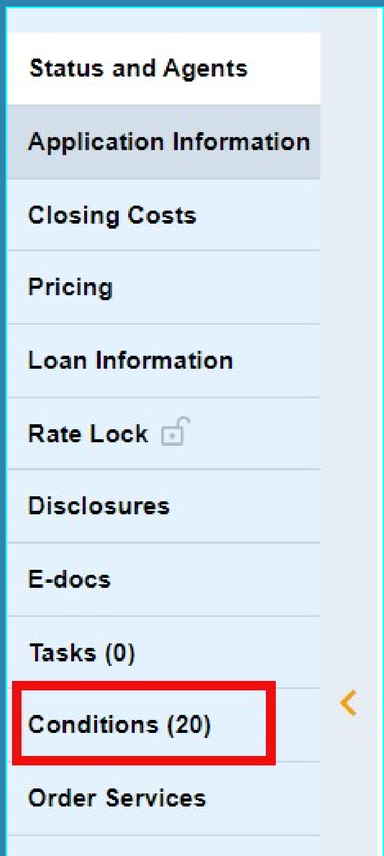
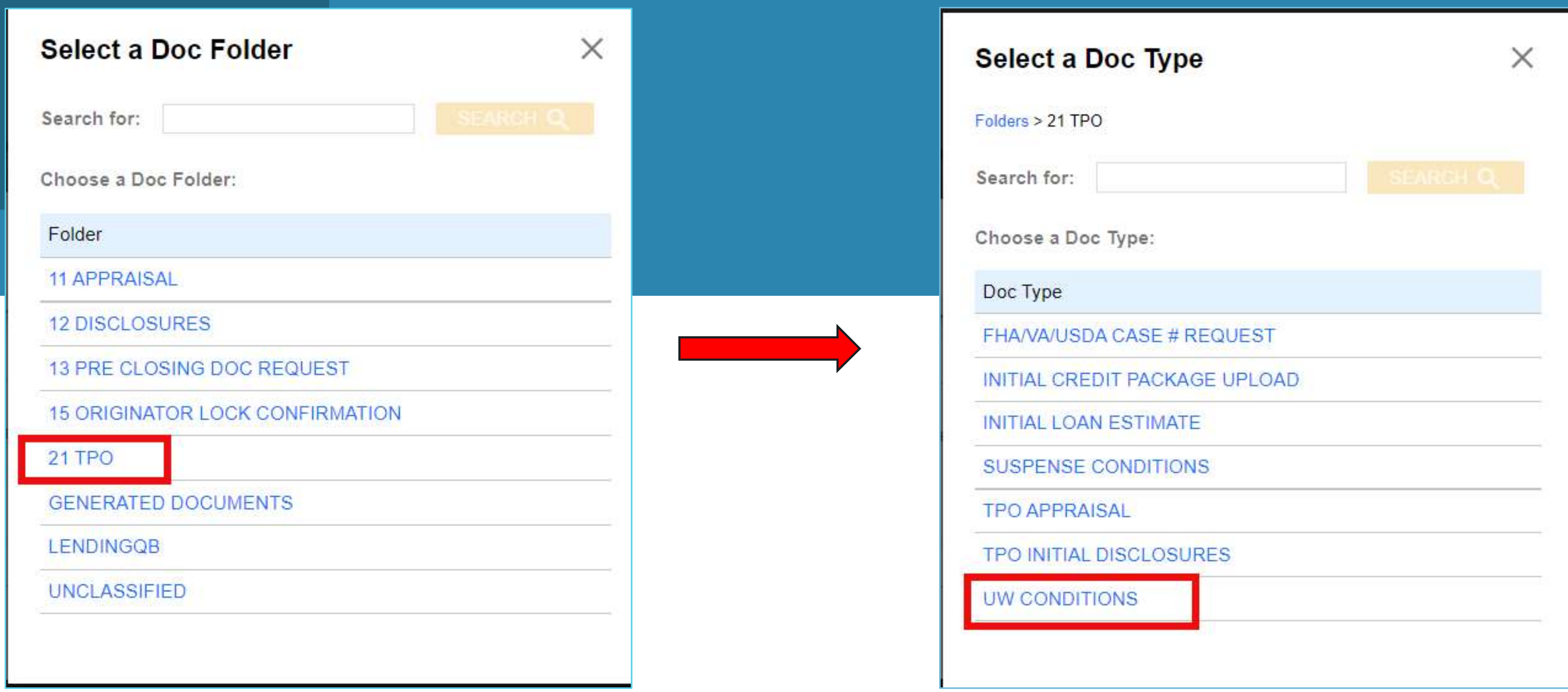
How To Submit to Initial Underwriting

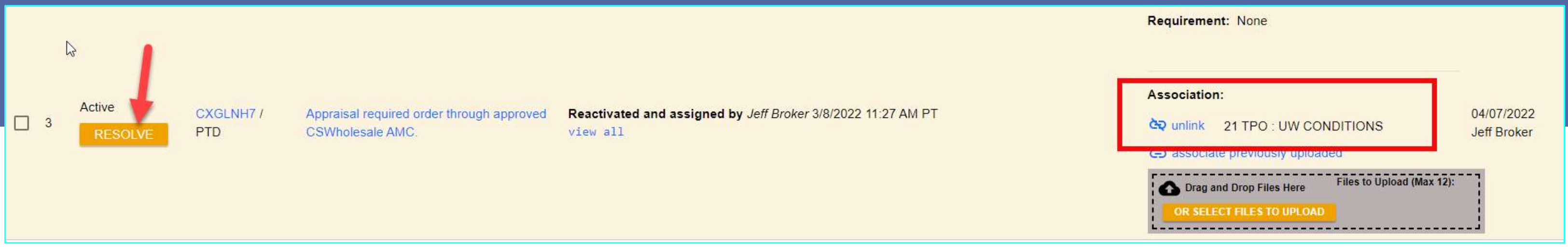
When you have the necessary documents required for submission you can procced with moving the loan into submission for Initial Underwrite. Select “Conditions” from the left side of your screen and a new window will open with the pre-populated conditions for the selected loan program (Conditions will 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.



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 Doc Type from list (for most of the documents you will use "21 TPO" and then "UW Conditions")

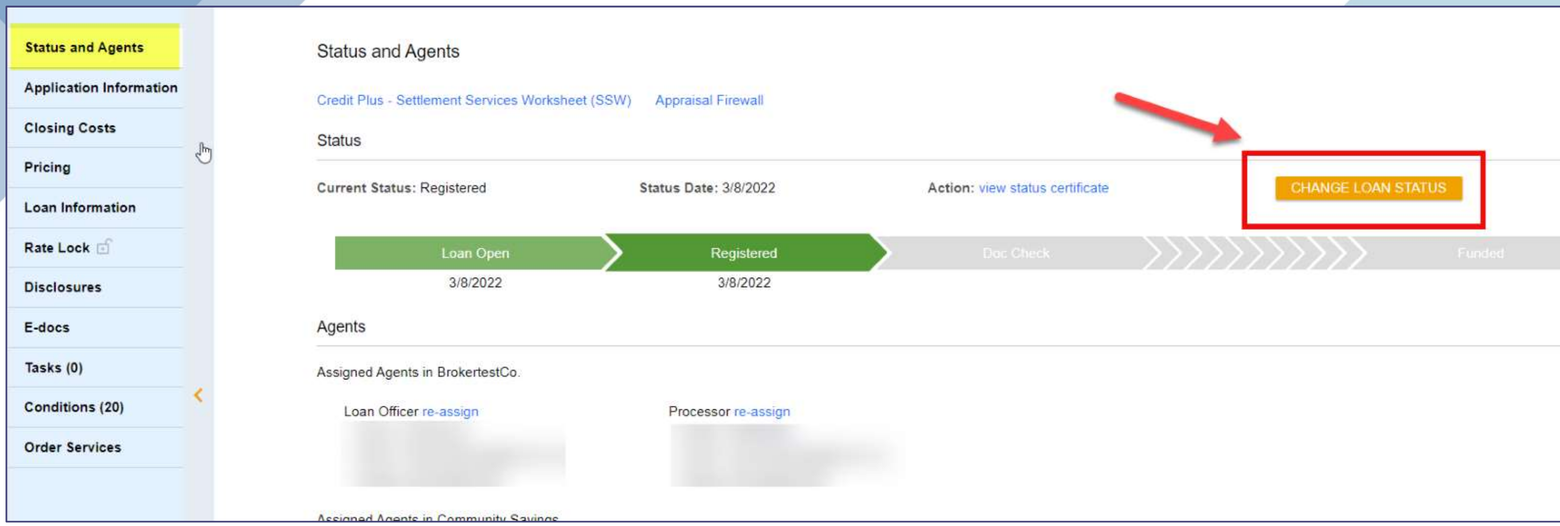




You will see the document has been linked to that condition and click "RESOLVE" to mark it ready for UW to review.

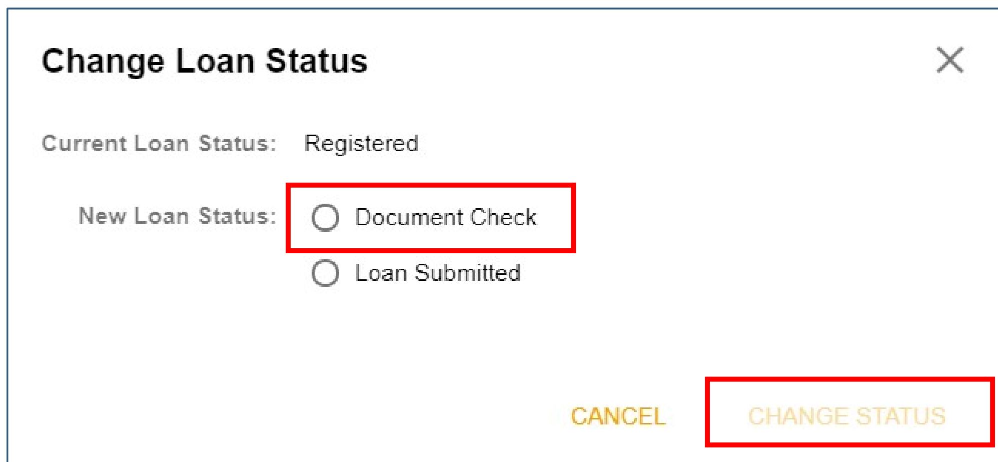
Repeat this process for all conditions that are required for submission (anything that is PTA) and any other conditions you would like to have reviewed at this time.

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 Sumbitted are basically the same thing, we just use the Document Check 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.

COMMUNITY SAVINGS