



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

Requirement: None

Active CXGLNH7 / [Redacted] Opened and assigned by Jeff Broker 3/8/2022 8:41 AM PT
3 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 Doc Type from list (for most of the documents you will use “21 TPO” and then “UW Conditions”)

Select a Doc Folder

Search for: SEARCH Q

Choose a Doc Folder:

Folder
11 APPRAISAL
12 DISCLOSURES
13 PRE CLOSING DOC REQUEST
15 ORIGINATOR LOCK CONFIRMATION
21 TPO
GENERATED DOCUMENTS
LENDINGQB
UNCLASSIFIED



Select a Doc Type

Folders > 21 TPO

Search for: SEARCH Q

Choose a Doc Type:

Doc Type
FHA/VA/USDA CASE # REQUEST
INITIAL CREDIT PACKAGE UPLOAD
INITIAL LOAN ESTIMATE
SUSPENSE CONDITIONS
TPO APPRAISAL
TPO INITIAL DISCLOSURES
UW CONDITIONS

The screenshot shows a document management interface with a yellow background. On the left, there is a checkbox, the number '3', and the word 'Active'. A red arrow points to a yellow 'RESOLVE' button. To the right of the button, the text 'CXGLNH7 / PTD' is displayed. Further right, there is a blue link 'Appraisal required order through approved CSWholesale AMC.' and a grey box containing the text 'Reactivated and assigned by Jeff Broker 3/8/2022 11:27 AM PT' with a 'view all' link below it. On the far right, the text 'Requirement: None' is visible. Below this, there is a red-bordered box labeled 'Association:' containing a blue 'unlink' link and the text '21 TPO : UW CONDITIONS'. Below the red box is a blue link 'associate previously uploaded'. At the bottom right, there is a dashed box for file uploads with the text 'Drag and Drop Files Here', 'Files to Upload (Max 12):', and a yellow 'OR SELECT FILES TO UPLOAD' button. The date '04/07/2022' and the name 'Jeff Broker' are shown on the far right.

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”

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.

