

Quick Tips for a Clean Submission

Review:

- ☐ Confirm all information imported correctly from your 3.4 file upload
- ☐ Contact info for loan processor must be listed as the "primary contact" in the registration screen to receive all loan notifications
- ☐ Review the modify loan parameters button in the dashboard before disclosing or locking
- ☐ Confirm all FICO scores have updated, occupancy and property type are complete and accurate
- ☐ Product/Term/Rate/Point/Fee Selection ?
- ☐ Check in the Key Dates Tab to make sure the Initial Disclosure package has been consented/opened and e-signed by the borrower.
- ☐ File must receive FNMA DU Approve/Eligible or FHLMC LP Eligible/Accept AUS results.
- ☐ Please check "yes" for the final upload of a submission.
- ☐ Conditions are driven by the AUS Results findings + IMC overlays

Required Documents:

- ☐ Credit report
- ☐ Complete URLA with the LO's signature date - should be in the initial disclosure package we release.
- ☐ E-signing by the borrower should be complete at the time of submission to ensure a clean approval.
- ☐ Income documentation
- ☐ SSA-89 wet signed if the borrower(s) social security numbers are truncated on income documentation.
- ☐ Purchase agreement and addendums, if applicable

Other documents to include:

- ☐ Preliminary Title Commitment, CPL, and wire
- ☐ Condo Documentation, if applicable
- ☐ Credit Report Invoice
- ☐ Title Invoice
- ☐ Payoff Statement, if applicable
- ☐ Asset statements, if applicable