

# B.O.L.T. TRAINING

## Lesson 19 - Submitting A Loan To Underwriting



# In This Training We Will Discuss

- Submitting A Loan To Underwriting



# Submitting A Loan To Underwriting

**Status and Agents**

Status

Current Status: Registered      Status Date: 12/21/2018      Action: [view status certificate](#)      [CHANGE LOAN STATUS](#)

Loan Open      Registered      Doc Check      Funded

12/21/2018      12/21/2018

**Agents**

Assigned Agents in \*TPO LQB Testing

Loan Officer <a href="#">re-assign</a>	Processor <a href="#">assign</a>
Name: Matthew Baker	Name:
Email: matthew.baker@mwfinc.com	Email:
Phone: (909) 793-1500	Phone:

Assigned Agents in Mountain West Financial, Inc.

**LIVE CHAT**

1. Within a loan, click “E-Docs”.




Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock 

Disclosures

E-docs

Conditions (3)

Order Services

E-docs

DOCUMENT UPLOAD

SUBMIT TO DOCUMENT CHECK

	Doc Type	Application	Description	Last Modified Date	Pages
<a href="#">view PDF</a>	CLOSING DOCS - FLOOD CERT	SUZI BUILDER	Flood Cert	12/26/2018 8:12:12 AM	1
<a href="#">view PDF</a>	DISCLOSURES - ANTI STEERING DISCLOSURE	SUZI BUILDER		12/21/2018 9:38:25 AM	1
<a href="#">view PDF</a>	CREDIT - CREDIT REPORT	SUZI BUILDER	Credit Report	12/21/2018 9:10:57 AM	15

LIVE CHAT

2. Click “Document Upload”.



MOUNTAIN  
WEST  
FINANCIAL, INC.

888.793.6470

## Mountain West Financial Document Upload (v.1.0.0.0)

**Hi Matthew Baker**

Welcome to Mountain West Financial's document upload page. You can safely and securely upload loan documents to us for processing. You will receive a confirmation email once the system starts the processing of your documents. You will also receive a confirmation when the files have completed processing and are in the loan file for your review. Below is some information to help with this process.

1. You can add additional email addresses to the **Conformation Email** field. *If adding multiple addresses, separate them with a comma (,).*
2. Select the upload option you wish to use.
3. **PDF, tiff and .fnm** files are the only accepted file types.
4. You can either drag and drop your files to the upload window. Or you can select the "Add Files" option to add them. There is no limit to the number of files you can upload.

Loan Number : **1000048222**

Borrower : **SUZI BUILDER**

Property Address : **1209 Nevada Street REDLANDS, CA 92374**

Loan Program : **CF30 - CONF FIXED 30YR**

Loan Stage : **Registered**

Confirmation Email :

### 3. The Document Upload page will appear.

limit to the number of files you can upload.

Loan Number : **1000048222**

Borrower : **SUZI BUILDER**

Property Address : **1209 Nevada Street REDLANDS, CA 92374**

Loan Program : **CF30 - CONF FIXED 30YR**

Loan Stage : **Registered**

Confirmation Email : **bolt.trainer@mwfinc.com**


Borrower Signed Disclosures

New Loan Submission

Additional Submission Documents

ConformX Disclosures (Internal MWF employee use ONLY!)

Purchase Contract

 Equal Housing Lender

#### 4. Confirm the Confirmation To email is correct.

limit to the number of files you can upload.

Loan Number : **1000048222**

Borrower : **SUZI BUILDER**

Property Address : **1209 Nevada Street REDLANDS, CA 92374**

Loan Program : **CF30 - CONF FIXED 30YR**

Loan Stage : **Registered**

Confirmation Email : **bolt.trainer@mwfinc.com,  
additional.email@mwfinc.com**


Borrower Signed Disclosures

New Loan Submission

Additional Submission Documents

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## 5. Enter additional emails, if needed.



limit to the number of files you can upload.

Loan Number : **1000048222**

Borrower : **SUZI BUILDER**

Property Address : **1209 Nevada Street REDLANDS, CA 92374**

Loan Program : **CF30 - CONF FIXED 30YR**

Loan Stage : **Registered**

Confirmation Email : **bolt.trainer@mwfinc.com,  
additional.email@mwfinc.com**


Borrower Signed Disclosures

New Loan Submission

Additional Submission Documents

ConformX Disclosures (Internal MWF employee use ONLY!)

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## 6. Click “New Loan Submission”.



← Back to Upload Options


New Loan Submission Upload

Filename	Size	Status
To add files either 1. Drag them here or 2. Select Add Files button.		

+ Add Files

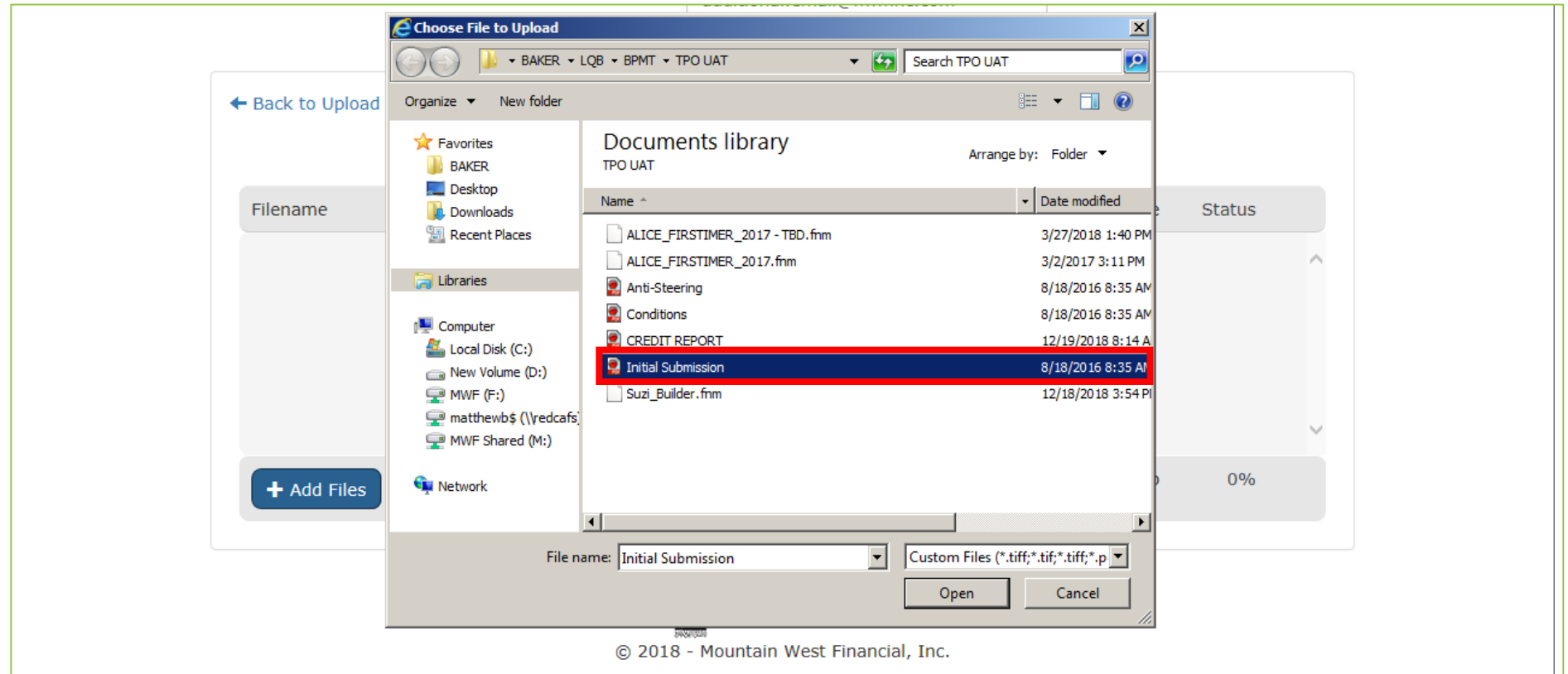
Upload Files

Files selected to upload : 00 b0%

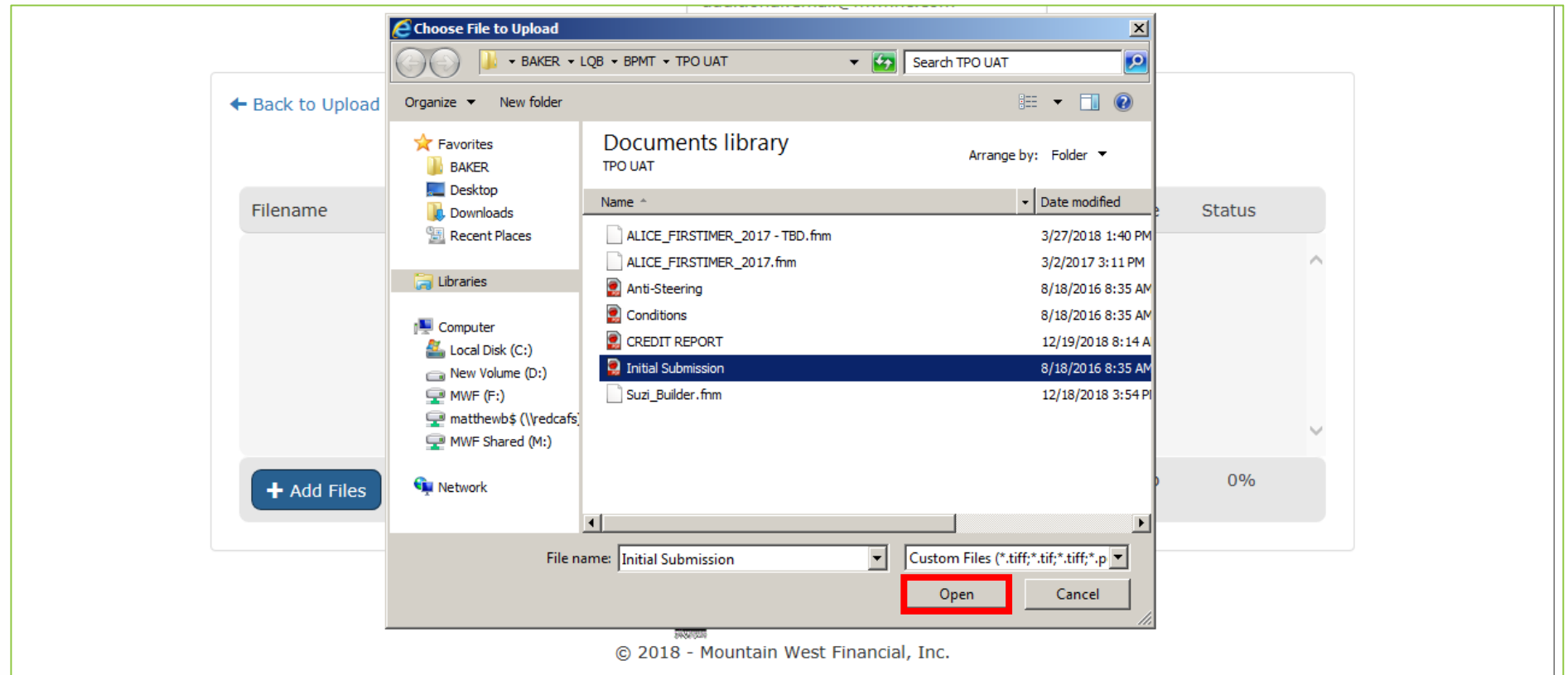
 Equal Housing Lender

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7. Click “Add Files”.



- Find and select all the documents needed for initial submission to Underwriting.



9. Click "Open".



← Back to Upload Options


New Loan Submission Upload

Filename	Size	Status
Initial Submission.pdf	81 kb	0%

+ Add Files

⬇ Upload Files

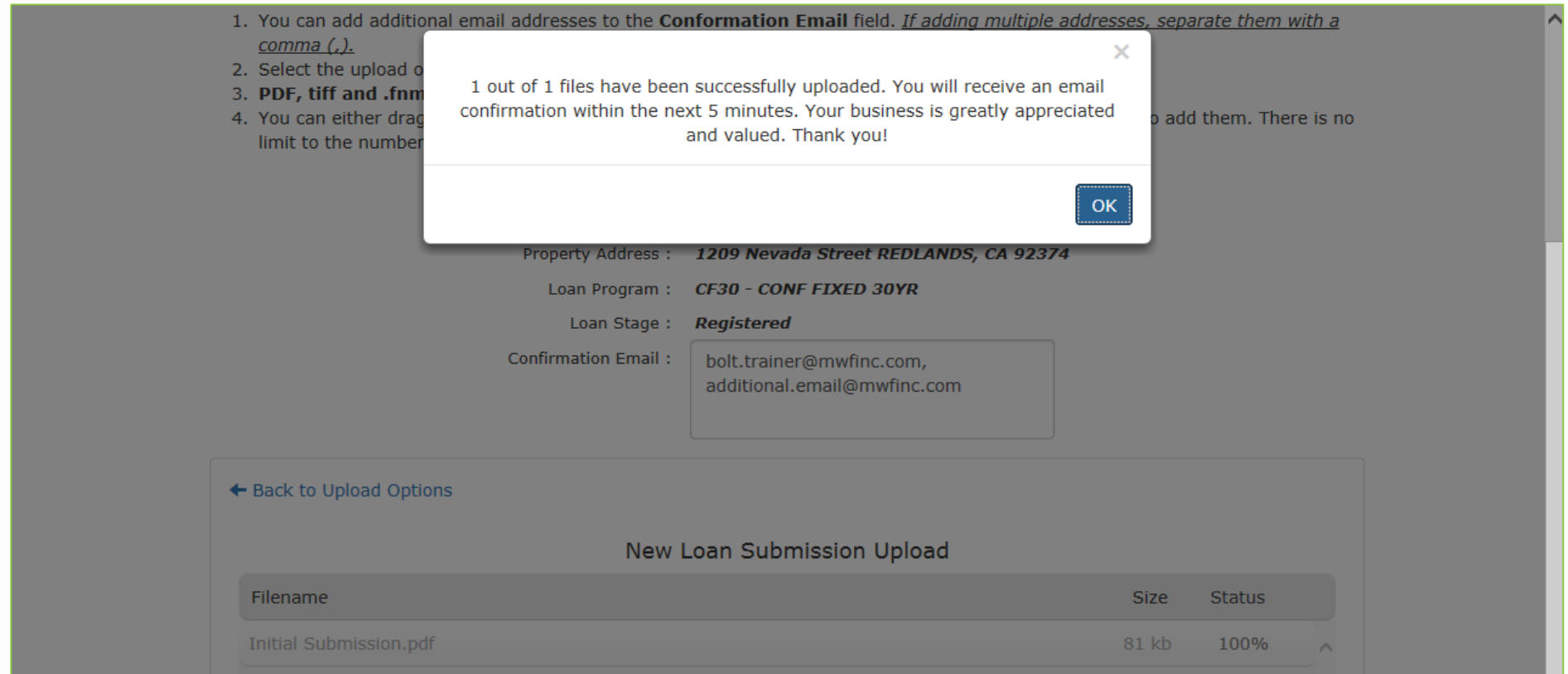
Files selected to upload : 181 kb0%

 Equal Housing Lender

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10. Click “Upload Flies”.





## 11. A confirmation window will appear.



1. You can add additional email addresses to the **Confirmation Email** field. *If adding multiple addresses, separate them with a comma (,).*

2. Select the upload option.

3. **PDF, tiff and .fnn**

4. You can either drag and drop or click to select files. There is no limit to the number of files you can upload.

1 out of 1 files have been successfully uploaded. You will receive an email confirmation within the next 5 minutes. Your business is greatly appreciated and valued. Thank you!

OK

Property Address : **1209 Nevada Street REDLANDS, CA 92374**

Loan Program : **CF30 - CONF FIXED 30YR**

Loan Stage : **Registered**

Confirmation Email : **bolt.trainer@mwfinc.com, additional.email@mwfinc.com**

[← Back to Upload Options](#)

### New Loan Submission Upload

Filename	Size	Status
Initial Submission.pdf	81 kb	100%

## 12. Click “OK”.


Bing Maps + Get more apps

Thank you for uploading documents to Mountain West Financial, Inc. Please retain this message as confirmation of receipt and note that any conditions and/or submission documents will be reviewed in the order received. You can monitor up-to-the-minute loan status via [Lending QB](#). For questions, please contact your Account Executive.

The following NewLoanSubmission Document(s) has been uploaded:

Document Name	Page Count	Document Link (MWF Internal Use Only)	Status
Initial Submission.pdf	1	<a href="#">View</a>	Success

Thank you for your business!



13. Two confirmation emails will also be sent, one when the documents are initially uploaded through the link, and one when the documents are validated/viewable in the loan.

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	Doc Type	Application	Description	Last Modified Date	Pages
<a href="#">view PDF</a>	CLOSING DOCS - FLOOD CERT	SUZI BUILDER	Flood Cert	12/26/2018 10:14:17 AM	1
<a href="#">view PDF</a>	ESCROW - DEMAND	SUZI BUILDER		12/20/2018 10:09:44 AM	17
<a href="#">view PDF</a>	GENERATED DOCUMENTS - INITIAL DISCLOSURE	SUZI BUILDER	Autosaved: 4:59 PM	12/19/2018 4:59:17 PM	41
<a href="#">view PDF</a>	APPLICATION - AUS	SUZI BUILDER	DO/DU Findings	12/19/2018 10:03:13 AM	3
<a href="#">view PDF</a>	LEFT SIDE EXTERNAL - LOCK CONFIRMATION	SUZI BUILDER	Lock Confirmation	12/19/2018 9:18:12 AM	1
<a href="#">view PDF</a>	CREDIT - CREDIT REPORT	SUZI BUILDER	Credit Report	12/19/2018 8:10:11 AM	15

LIVE CHAT

14. The E-Docs page will return.




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<a href="#">view PDF</a>	ESCROW - DEMAND	SUZI BUILDER		12/20/2018 10:09:44 AM	17
<a href="#">view PDF</a>	GENERATED DOCUMENTS - INITIAL DISCLOSURE	SUZI BUILDER	Autosaved: 4:59 PM	12/19/2018 4:59:17 PM	41
<a href="#">view PDF</a>	APPLICATION - AUS	SUZI BUILDER	DO/DU Findings	12/19/2018 10:03:13 AM	3
<a href="#">view PDF</a>	LEFT SIDE EXTERNAL - LOCK CONFIRMATION	SUZI BUILDER	Lock Confirmation	12/19/2018 9:18:12 AM	1
<a href="#">view PDF</a>	CREDIT - CREDIT REPORT	SUZI BUILDER	Credit Report	12/19/2018 8:10:11 AM	15

LIVE CHAT

15. Click “Submit to Document Check”.



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<a href="#">view PDF</a>	ESCROW - DE			12/20/2018 10:09:44 AM	17
<a href="#">view PDF</a>	GENERATED INITIAL DISCL		59 PM	12/19/2018 4:59:17 PM	41
<a href="#">view PDF</a>	APPLICATION - AUS	SUZI BUILDER	DO/DU Findings	12/19/2018 10:03:13 AM	3
<a href="#">view PDF</a>	LEFT SIDE EXTERNAL - LOCK CONFIRMATION	SUZI BUILDER	Lock Confirmation	12/19/2018 9:18:12 AM	1
<a href="#">view PDF</a>	CREDIT - CREDIT REPORT	SUZI BUILDER	Credit Report	12/19/2018 8:10:11 AM	15

×

Are you sure you would like to **Submit to Document Check?**

CANCEL

OK


16. A confirmation window will appear.

DOCUMENT UPLOAD    SUBMIT TO DOCUMENT CHECK

Closing Costs

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E-docs <

Conditions (0)

Order Services

	Doc Type	Application	Description	Last Modified Date	Pages
<a href="#">view PDF</a>	CLOSING DOCS - FLOOD CERT			12/26/2018 10:14:17 AM	1
<a href="#">view PDF</a>	ESCROW - DE			12/20/2018 10:09:44 AM	17
<a href="#">view PDF</a>	GENERATED INITIAL DISCL			12/19/2018 4:59:17 PM	41
<a href="#">view PDF</a>	APPLICATION - AUS	SUZI BUILDER	DO/DU Findings	12/19/2018 10:03:13 AM	3
<a href="#">view PDF</a>	LEFT SIDE EXTERNAL - LOCK CONFIRMATION	SUZI BUILDER	Lock Confirmation	12/19/2018 9:18:12 AM	1
<a href="#">view PDF</a>	CREDIT - CREDIT REPORT	SUZI BUILDER	Credit Report	12/19/2018 8:10:11 AM	15

Are you sure you would like to **Submit to Document Check?**

CANCEL OK

17. Click “OK”

**This will submit the loan to Underwriting.**

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<a href="#">view PDF</a>	GENERATED DOCUMENTS - INITIAL DISCLOSURE		Completed: 4:59 PM	12/19/2018 4:59:17 PM	41
<a href="#">view PDF</a>	APPLICATION - AUS	SUZI BUILDER	DO/DO Findings	12/19/2018 10:03:13 AM	3
<a href="#">view PDF</a>	LEFT SIDE EXTERNAL - LOCK CONFIRMATION	SUZI BUILDER	Lock Confirmation	12/19/2018 9:18:12 AM	1
<a href="#">view PDF</a>	CREDIT - CREDIT REPORT	SUZI BUILDER	Credit Report	12/19/2018 8:10:11 AM	15

X

Submission to "Document Check" status successful.

OK

18. A confirmation window will appear.

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<a href="#">view PDF</a>	CREDIT - CREDIT REPORT	SUZI BUILDER	Credit Report	12/19/2018 8:10:11 AM	15

×

Submission to "Document Check" status successful.

OK

19. Click “OK”.

- 
20. Expect a disposition from the Underwriter within the posted turn time. If additional items are required to move the submission forward, Mountain West will contact the Broker.





# THANK YOU FOR VIEWING

For further B.O.L.T. Training, please visit <https://www.mwfwholesale.com>