

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 re-assign	Processor assign
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”.

E-docs

[DOCUMENT UPLOAD](#) [SUBMIT TO DOCUMENT CHECK](#)

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

2. Click “Document Upload”.



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 **Confirmation 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



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

ConformX Disclosures (Internal MWF employee use ONLY!)

Purchase Contract



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 :

Borrower Signed Disclosures

New Loan Submission

Additional Submission Documents

ConformX Disclosures (Internal MWF employee use ONLY!)

Purchase Contract



6. Click “New Loan Submission”.

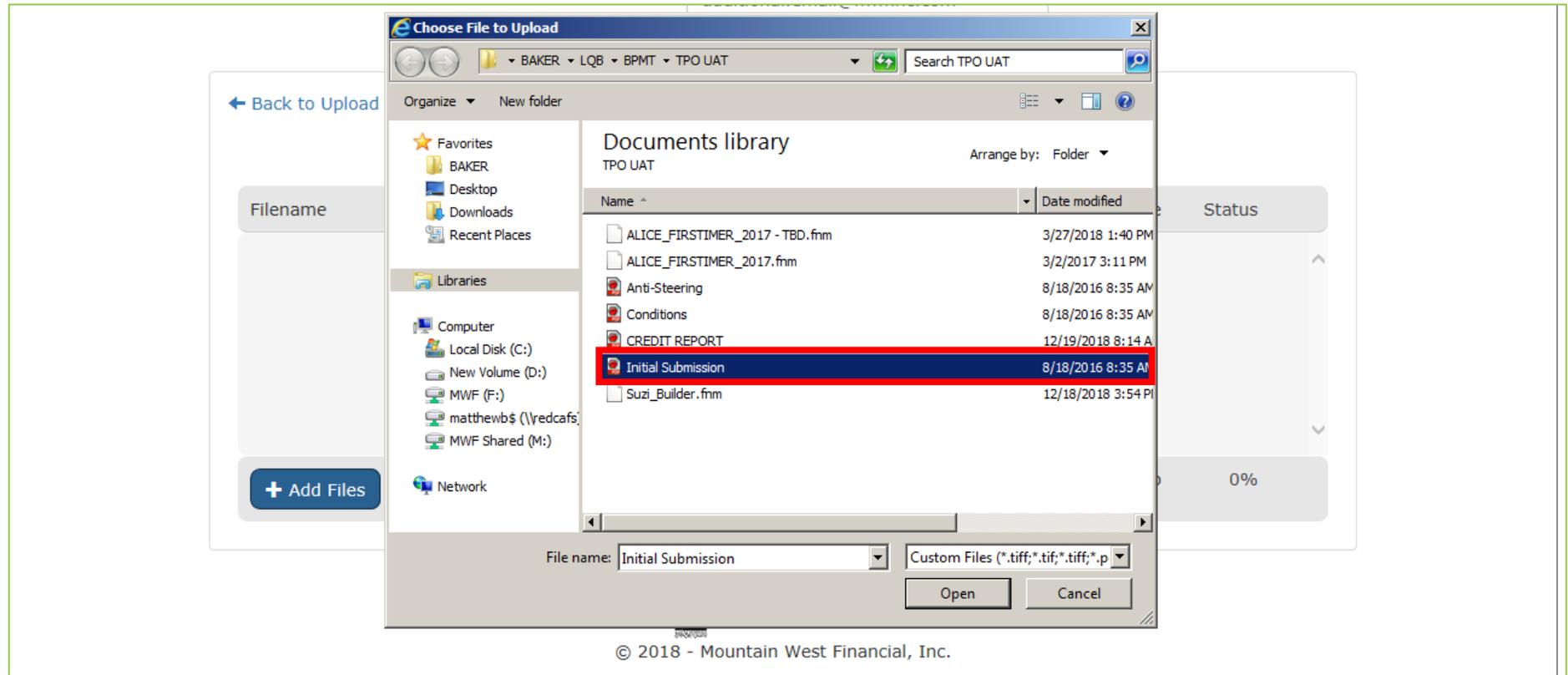
[← Back to Upload Options](#)

New Loan Submission Upload

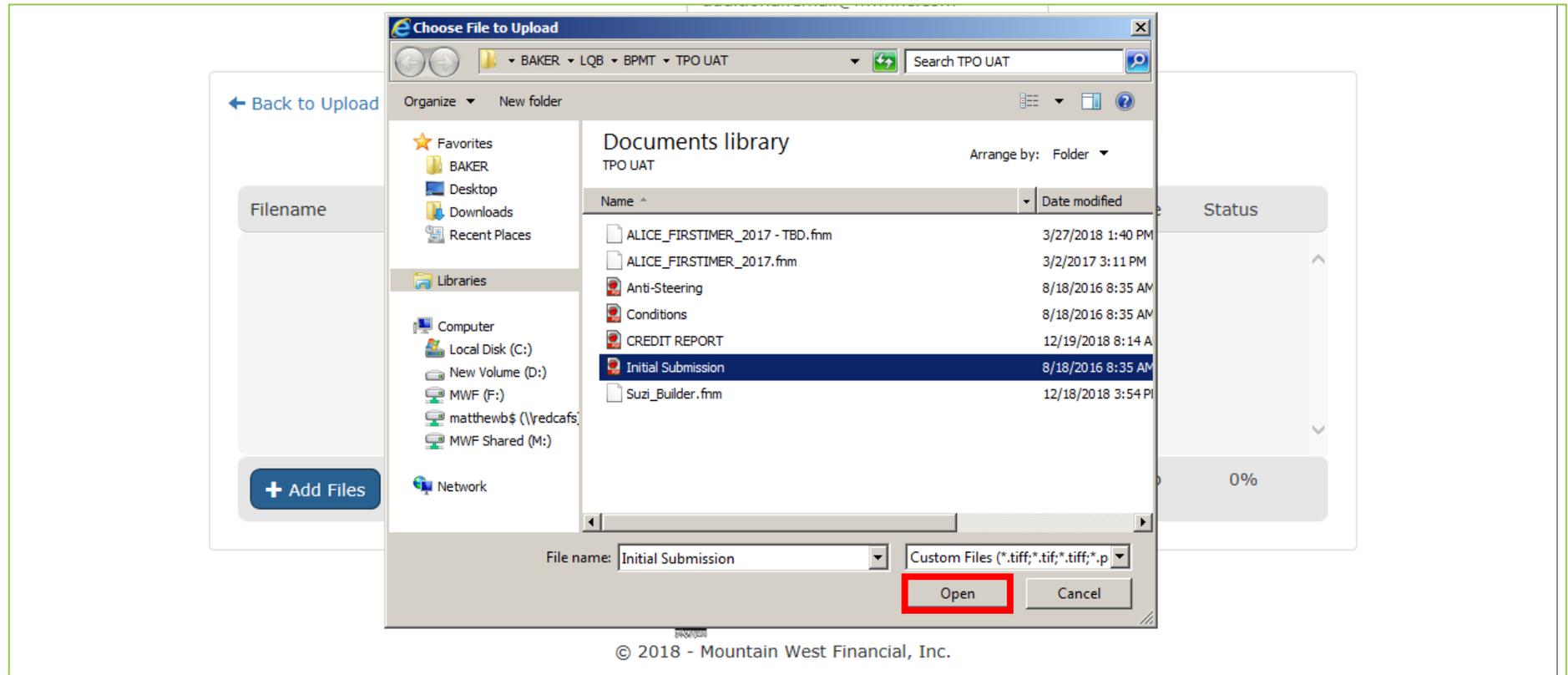
Filename	Size	Status
To add files either 1. Drag them here or 2. Select Add Files button.		
+ Add Files	Upload Files	Files selected to upload : 0 0 b 0%

 Equal Housing Lender
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7. Click “Add Files”.



8. 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 : 1** 81 kb 0%

 Equal Housing Lender
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10. Click “Upload Flies”.



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 .fmm**

4. You can either drag and drop or click to select files to add them. 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%

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 .fmm**

4. You can either drag and drop or click to select files to add them. 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	View	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.



- Status and Agents
- Application Information
- Closing Costs
- Pricing
- Loan Information
- Rate Lock
- Disclosures
- E-docs <
- Conditions (0)
- Order Services

E-docs

DOCUMENT UPLOAD
SUBMIT TO DOCUMENT CHECK

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

LIVE CHAT

14. The E-Docs page will return.

E-docs

DOCUMENT UPLOAD **SUBMIT TO DOCUMENT CHECK**

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

15. Click “Submit to Document Check”.

The screenshot shows a web application interface with a sidebar on the left and a main content area. The sidebar contains the following menu items: Closing Costs, Pricing, Loan Information, Rate Lock (with a lock icon), Disclosures, E-docs (with a left arrow icon), Conditions (0), and Order Services. The main content area has a header with two buttons: "DOCUMENT UPLOAD" and "SUBMIT TO DOCUMENT CHECK". Below the header is a table with the following columns: Doc Type, Application, Description, Last Modified Date, and Pages. The table contains several rows of document information, each with a "view PDF" link. A white confirmation dialog box is overlaid on the table, containing the text "Are you sure you would like to Submit to Document Check?" and two buttons: "CANCEL" and "OK".

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

16. A confirmation window will appear.

The screenshot shows a web application interface with a sidebar on the left containing menu items: Closing Costs, Pricing, Loan Information, Rate Lock, Disclosures, E-docs, Conditions (0), and Order Services. The main content area displays a table of documents with columns for Doc Type, Application, Description, Last Modified Date, and Pages. A modal dialog box is overlaid on the table, asking 'Are you sure you would like to Submit to Document Check?' with 'CANCEL' and 'OK' buttons. The 'OK' button is highlighted with a red box.

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

17. Click "OK"

This will submit the loan to Underwriting.

The screenshot displays a web application interface with a sidebar on the left and a main content area. The sidebar contains menu items: Closing Costs, Pricing, Loan Information, Rate Lock (with a lock icon), Disclosures, E-docs, Conditions (0), and Order Services. The main content area has a top navigation bar with buttons for 'DOCUMENT UPLOAD' and 'SUBMIT TO DOCUMENT CHECK'. Below this is a table with columns: Doc Type, Application, Description, Last Modified Date, and Pages. A modal dialog box is overlaid on the table, displaying the message 'Submission to "Document Check" status successful.' with an 'OK' button and a close 'X' icon.

	Doc Type	Application	Description	Last Modified Date	Pages
view PDF	CLOSING DOCS - FLOOD CERT			12/26/2018 10:14:17 AM	1
view PDF	ESCROW - DEMAN			12/20/2018 10:09:44 AM	17
view PDF	GENERATED DOC INITIAL DISCLOSU			12/19/2018 4:59:17 PM	41
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view PDF	LEFT SIDE EXTERNAL - LOCK CONFIRMATION	SUZI BUILDER	Lock Confirmation	12/19/2018 9:18:12 AM	1
view PDF	CREDIT - CREDIT REPORT	SUZI BUILDER	Credit Report	12/19/2018 8:10:11 AM	15

18. A confirmation window will appear.

The screenshot shows a web application interface with a sidebar on the left and a main content area. The sidebar contains menu items: Closing Costs, Pricing, Loan Information, Rate Lock (with a lock icon), Disclosures, E-docs (with a left arrow), Conditions (0), and Order Services. The main content area has two buttons at the top: "DOCUMENT UPLOAD" and "SUBMIT TO DOCUMENT CHECK". Below these is a table with columns: Doc Type, Application, Description, Last Modified Date, and Pages. A modal dialog box is overlaid on the table, displaying the message "Submission to 'Document Check' status successful." and an "OK" button, which is highlighted with a red rectangle.

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

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>