

4506-T Feature in BOLT

WHOLESALE TRAINING



In This Training We Will Discuss

- 4506-T Feature

1. When ordering the disclosures in BOLT, the 4506-T screen needs to be filled out prior to completing the disclosures. It will now show up in the requirements checklist.

Disclosures

[Disclosures](#) > Order Initial Loan Estimate

1. Request Review

2. Vendor Audit

Please review the information below. All requirements must pass to proceed w

CANCEL ORDER

REQUEST LEND

Requirements Checklist

- ✘ Please complete the 4506-T screen
- ✔ File has registered program.
- ✔ Disclosures can only be generated if Disclosure Due Date has not passed.
- ✔ 1003 Interview Date must match the Application Date
- ✔ Email Address Cannot Be Blank
- ✔ Disclosure can only be generated if there is an Estimated Closing Date.
- ✔ Please request Lender to issue Disclosures
- ✔ File is not 203K or HomeStyle Renovation

2. To fill out the 4506-T screen in BOLT, click on Order Services – 4506-T – Add Order.

The screenshot displays the BOLT system interface. On the left is a dark grey sidebar menu with the following items: Status and Agents, Application Information, Closing Costs, Pricing, Loan Information, Rate Lock (with a lock icon), Disclosures, E-docs, Conditions (9), and Order Services. The 'Order Services' item at the bottom of the sidebar is highlighted with a red rectangular border. To the right of the sidebar, the main content area is titled 'Order Services'. Below this title, there are two tabs: '4506-T' and 'Appraisals'. The '4506-T' tab is selected and has a green underline. Below the tabs, there is a green button with the text 'ADD ORDER' in white, which is also highlighted with a red rectangular border. A green arrow points to the right from the bottom of the sidebar menu.

3. Select NO for question “Do you have a signed copy of the 4506-T form for this application?”

Do you have a signed copy of the 4506-T form for this application? * Yes No

4. If there is more than one borrower on the file, after completing the primary borrower, change application drop down to next borrower

Loan Pipeline	Borrower Name	Loan Amount	DTI	LTV	Gross
1000061194	Alice Firstimer	\$269,138.00	39.980%	98.189% / 96.499%	103. / 101.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (9)

Order Services

Order Services

4506-T Appraisals

Order Request Information

Application: Alice Firstimer ▾

- Alice Firstimer
- Suzi Builder**

5. If borrower has lived at present address for less than 2 years, complete previous address.

Borrower Name	Borrower SSN, TIN, or EIN	Co-Borrower Name	Co-Borrower SSN, TIN, or EIN
Alice Firstimer 	991-91-9991		
Previous Address			
Street	ZIPCode	City	State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

If borrower has lived at present address for at least 2 years, than proceed to completing transcript requested section.

6. Check boxes for required tax documentation

Transcript requested. Tax form number (1040, 1065, 1120, etc.):

a. Return Transcript, which includes most of the line items of a tax return as filed with the IRS

b. Account Transcript, which contains information on the financial status of the account

c. Record of Account, which is a combination of the line item information and later adjustments to the account

Verification of Nonfiling, which is proof from the IRS that you did not file a return for the year

Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript

Ending date of year or period requested (mm/dd/yyyy)   





7. Once all are completed, save changes and proceed to issuing disclosures.

Thank you for viewing

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