

B.O.L.T. TRAINING

Ordering Verification Of Assets (VOA)



In This Training We Will Discuss

- Ordering Verification Of Assets (VOA)
 - A feature to be used with FastForward
- Important Information



Ordering Verification Of Assets (VOA)

Status and Agents

Status

Current Status: Registered Status Date: 12/28/2018 Action: [view status certificate](#) [CHANGE LOAN STATUS](#)

Loan Open Registered Doc Check Funded

12/28/2018 12/28/2018

Agents

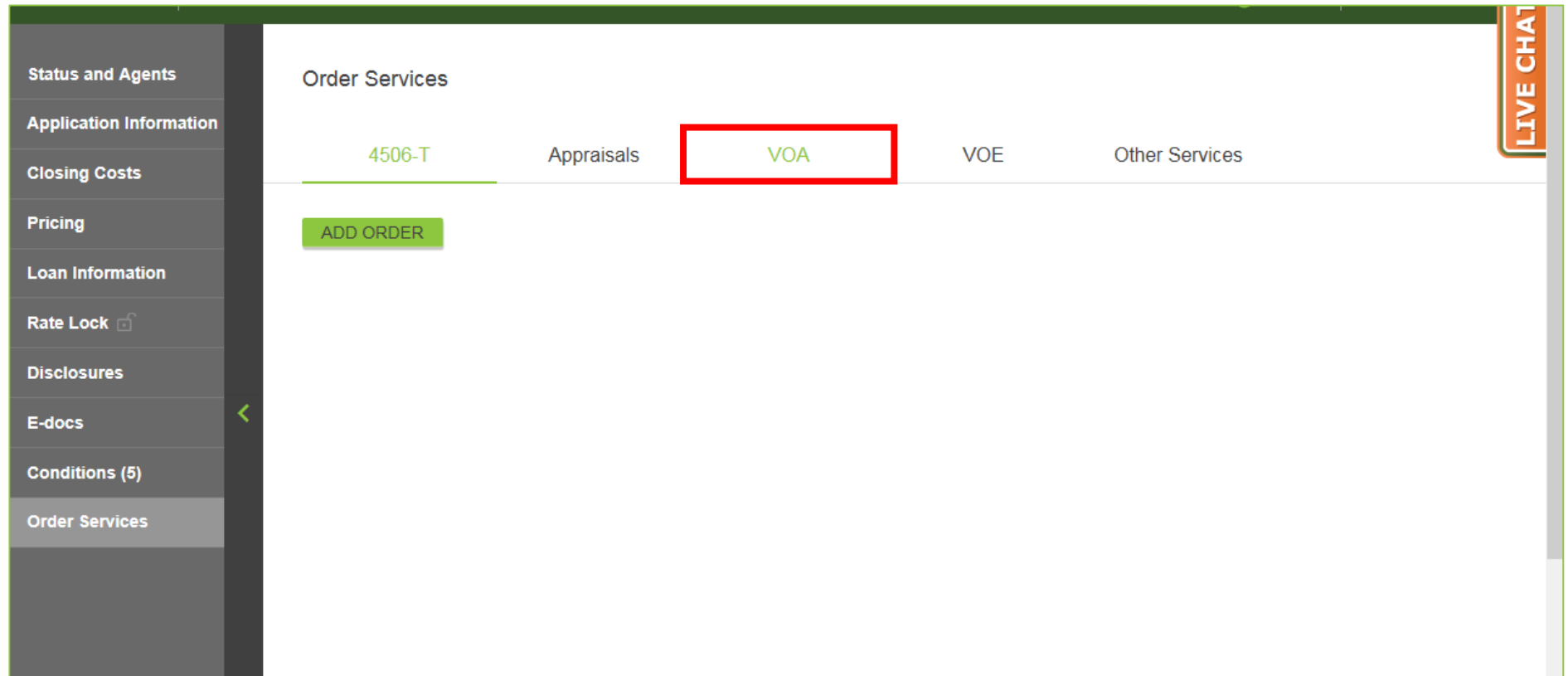
Assigned Agents in *TPO LQB Testing

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 “Order Services”.



2. Click “VOA”.




Order Services

4506-T Appraisals **VOA** VOE Other Services

Institution	Account Numbers	Service Provider	Order Number	Status	Results	Action	Date Ordered
ORDER NEW VOA/VOD							

LIVE CHAT

Navigation Menu:

- Status and Agents
- Application Information
- Closing Costs
- Pricing
- Loan Information
- Rate Lock 
- Disclosures
- E-docs
- Conditions (5)
- Order Services

3. Click “Order New VOA/VOD”.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (5)

Order Services

Order Services

4506-TAppraisalsVOAVOEOther Services

Institution	Account Numbers	Service Provider	Order Number	Status	Results	Action	Date Ordered
							CANCEL ORDER

Order Verification of Asset

Service Provider

BOLT VOA

Select borrower to verify

SUZI BUILDER

Order Options

Notification Email

bolt.trainer@mwfinc.com

Account History


60 Days

Refresh Period

None

LIVE CHAT

4. Select the appropriate Borrower, if more than one Borrower.




Application Information

Closing Costs

Pricing

Loan Information

Rate Lock 

Disclosures

E-docs

Conditions (5)

Order Services

4506-T Appraisals **VOA** VOE Other Services

Institution	Account Numbers	Service Provider	Order Number	Status	Results	Action	Date Ordered
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CANCEL ORDER

Order Verification of Asset

Service Provider
BOLT VOA *

Select borrower to verify
SUZI BUILDER

Order Options

Notification Email
bolt.trainer@mwfinc.com 

Account History
60 Days

Refresh Period
None

PLACE ORDER

5. All Required Fields should then auto-populate, but double check for accuracy/incompleteness.

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (5)

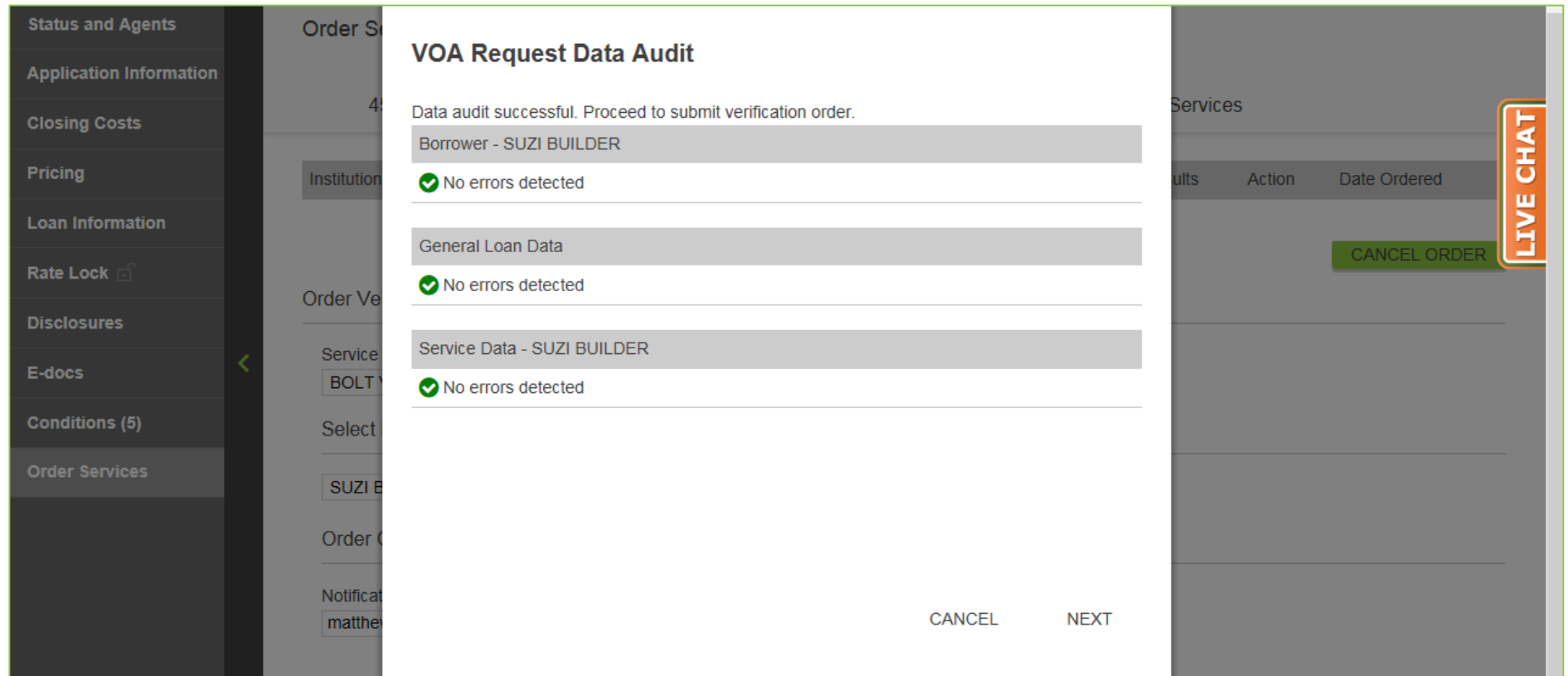
Order Services

4506-TAppraisalsVOA


VOEOther Services

Institution	Account Numbers	Service Provider	Order Number	Status	Results	Action	Date Ordered
							CANCEL ORDER
Order Verification of Asset							
Service Provider							
BOLT VOA							
Select borrower to verify							
SUZI BUILDER							
Order Options							
Notification Email		Account History	Refresh Period				
bolt.trainer@mwfinc.com		60 Days	None				
PLACE ORDER							

6. Click “Place Order”.



7. The VOA Request Data Audit window will appear.



VOA Request Data Audit

Data audit successful. Proceed to submit verification order.

Borrower - SUZI BUILDER

✔ No errors detected

General Loan Data

✔ No errors detected

Service Data - SUZI BUILDER

✔ No errors detected

CANCEL NEXT

LIVE CHAT

If Errors Are Detected

- 8-A.** Click on the Error. This will take you to the place in BOLT where the Error can be corrected. Then repeat Step #1 through Step #7.

VOA Request Data Audit

Data audit successful. Proceed to submit verification order.

Borrower - SUZI BUILDER

✓ No errors detected

General Loan Data

✓ No errors detected

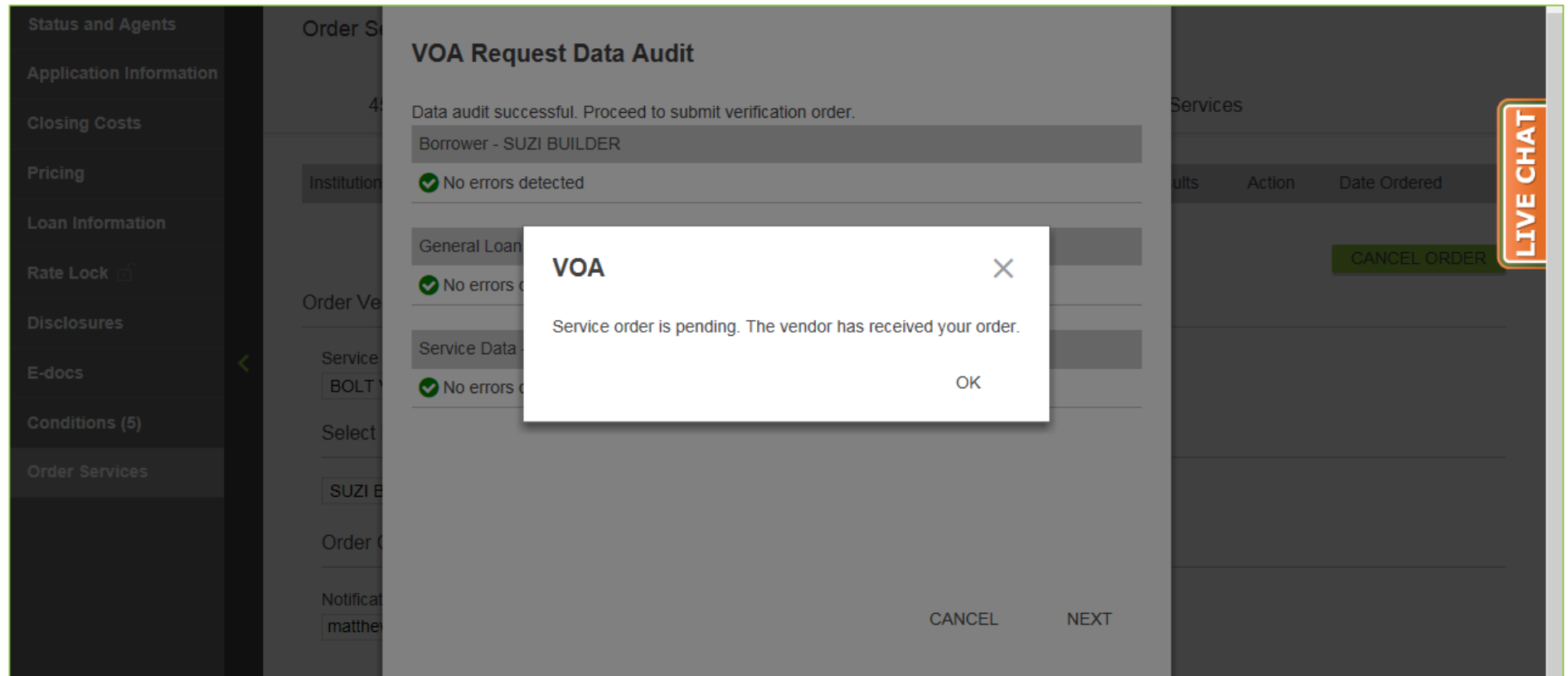
Service Data - SUZI BUILDER

✓ No errors detected

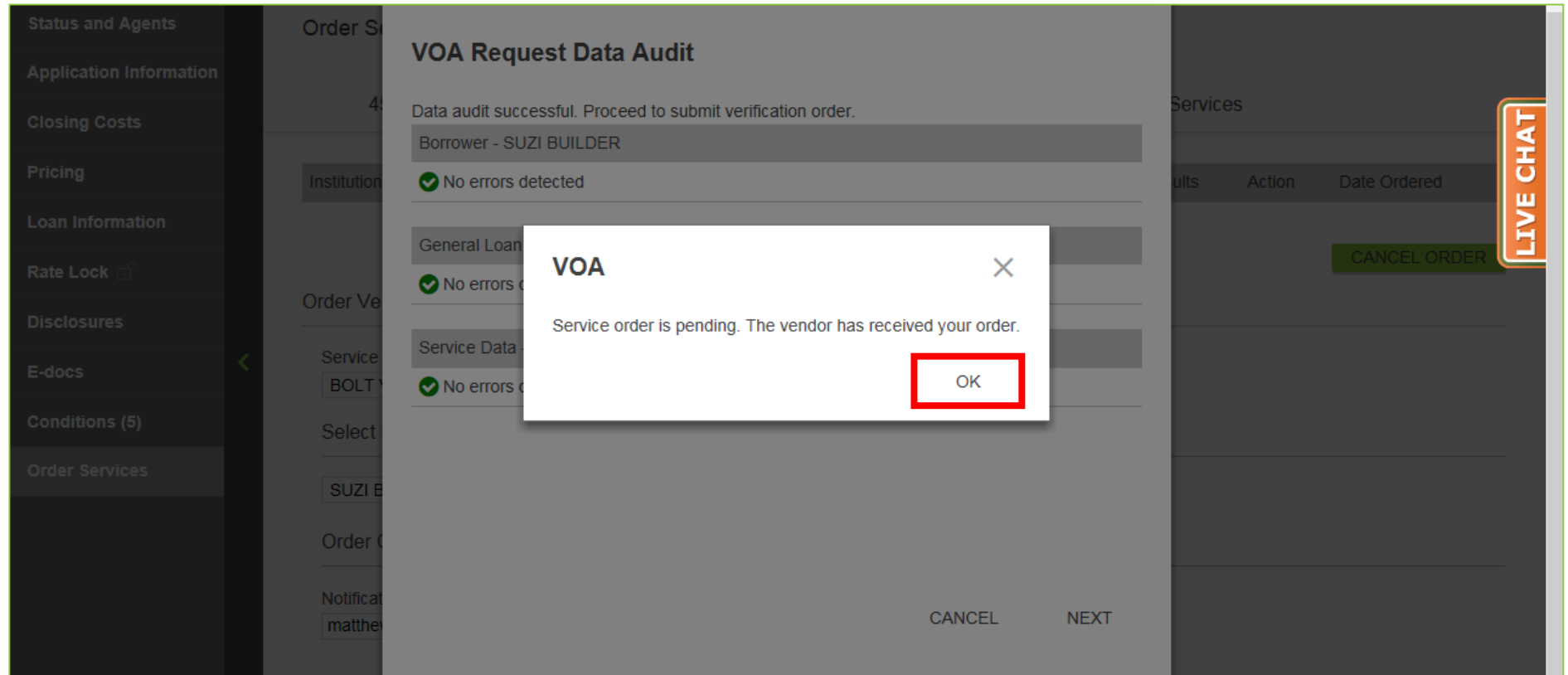
CANCEL NEXT

If No Errors Are Detected

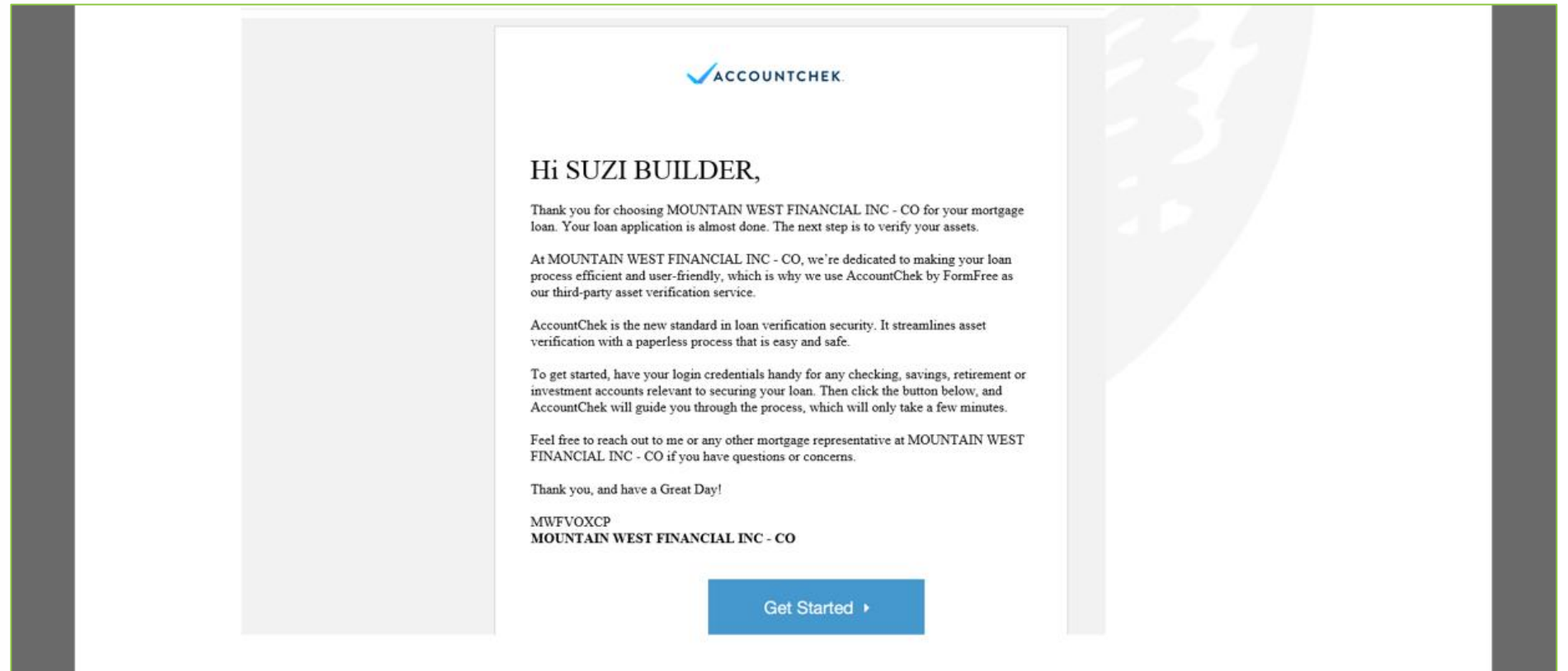
8-B. Click “Next”.



9. A confirmation window will appear.



10. Click “OK”.



11. The Borrower will then receive and email, asking them to verify Assets.



Once The Borrower Has Completed The Verification

- 12.** An email notification will be sent to the person that placed the order in B.O.L.T..

Status and Agents

Application Information

Closing Costs

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E-docs

Conditions (5)

Order Services

Order Services

4506-TAppraisalsVOAVOEOther Services

Institution	Account Numbers	Service Provider	Order Number	Status	Results	Action	Date Ordered
		BOLT VOA	26647	Pending	results	get results	12/31/2018 9:19:55 AM

ORDER NEW VOA/VOD

LIVE CHAT

Once That Email Is Received

13. Return to the VOA screen in B.O.L.T. and click “Get Results”.

- 
14. Repeat Step# 1 to Step #13 for any additional Borrowers.



Important Information



Important Information

- The information from the VOA will automatically be included with subsequent DU runs.
- This feature is to be used on loans utilizing FastForward
 - Conventional and Conventional High Balance
 - DU Only
 - Limited to 2 Borrowers
 - No Gift Funds
 - No Employment Related Assets
 - Eligible Asset Types
 - Checking & Savings
 - CD & Money Market Accounts
 - Stocks & Mutual Funds
 - Retirement Accounts



THANK YOU FOR VIEWING

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