

B.O.L.T. TRAINING

Ordering Verification Of Employment (VOE)



In This Training We Will Discuss

- Ordering Verification Of Employment (VOE)
 - A feature to be used with Fast Forward
- Important Information



Ordering Verification Of Employment (VOE)

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

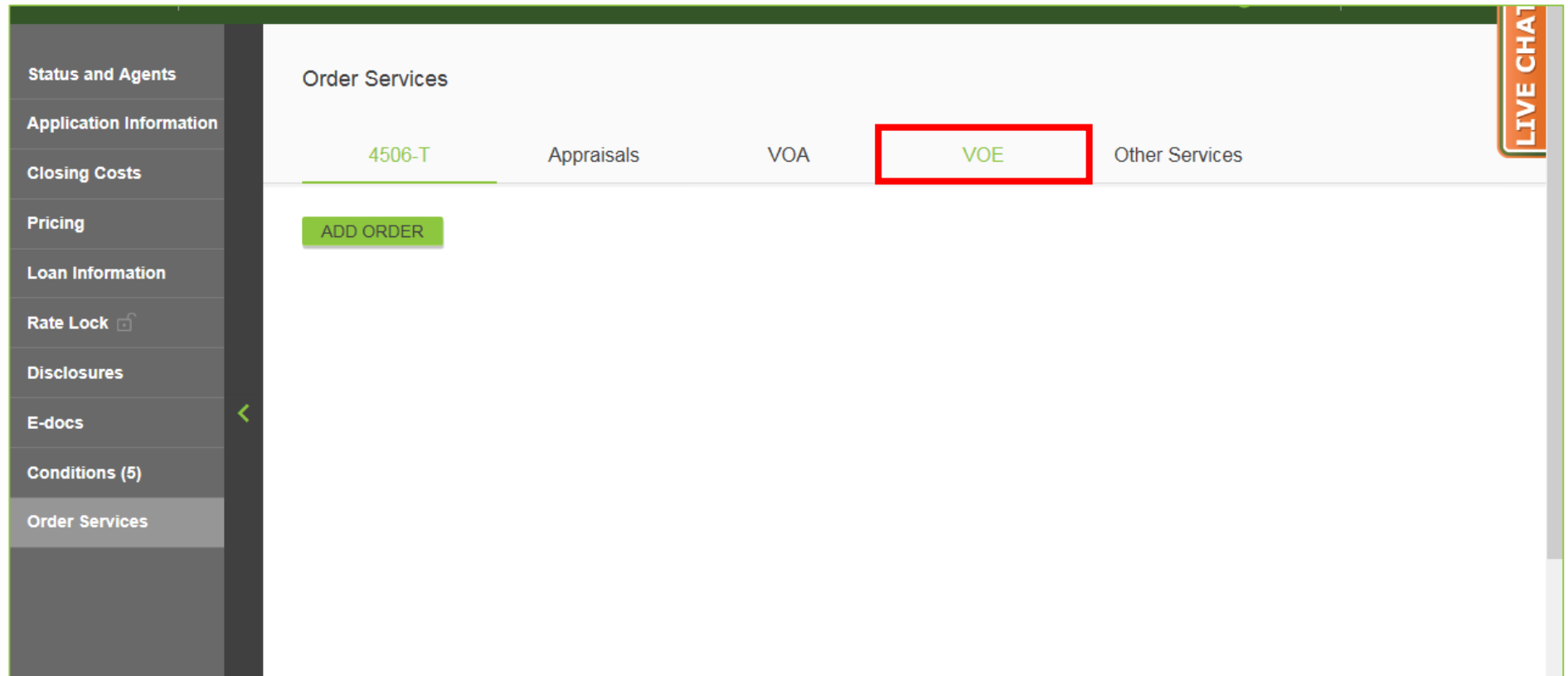
Loan Officer re-assign	Processor assign
Name: Matthew Baker	Name:
Email: matthew.baker@mwfinc.com	Email:
Phone: (909) 793-1500	Phone:

Assigned Agents in Mountain West Financial, Inc.

Order Services

LIVE CHAT

1. Within a loan, click “Order Services”.



2. Click “VOE”.


Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock 

Disclosures

E-docs

Conditions (5)

Order Services

Order Services

4506-TAppraisalsVOA**VOE**Other Services

Borrower	Employer	Service Provider	Order Number	Status	Results	Action	Date Ordered
<div>ORDER NEW VOE/VOI</div>							

LIVE CHAT

3. Click “Order New VOE/VOI”.

Status and Agents

Application Information

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E-docs

Conditions (5)

Order Services

Order Services

4506-TAppraisalsVOA**VOE**Other Services

Borrower	Employer	Service Provider	Order Number	Status	Results	Action	Date Ordered
<div>CANCEL ORDER</div>							

Order Verification of Employment

Service Provider

BOLT VOE *

Select borrower to verify


SUZI BUILDER

Order Options

Notification Email

LIVE CHAT

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



Order Services

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

Order Verification of Employment

Service Provider
BOLT VOE *

Select borrower to verify
SUZI BUILDER

Order Options

Notification Email
bolt.trainer@mwfinc.com

☒ Verify Income ☒ Use Specific Employer Record Search?

Verify employment records ☒ Verify borrower employment

Borrower Authorization Documents

LIVE CHAT

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

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (5)

Order Services

BOLT VOE *

Select borrower to verify ☐ Verify employment records ☒ Verify borrower employment

SUZI BUILDER

Order Options

Notification Email
bolt.trainer@mwfin.com

☒ Verify Income ☒ Use Specific Employer Record Search?

Borrower Authorization Documents

SUZI BUILDER **upload doc** select doc * ?

PLACE ORDER

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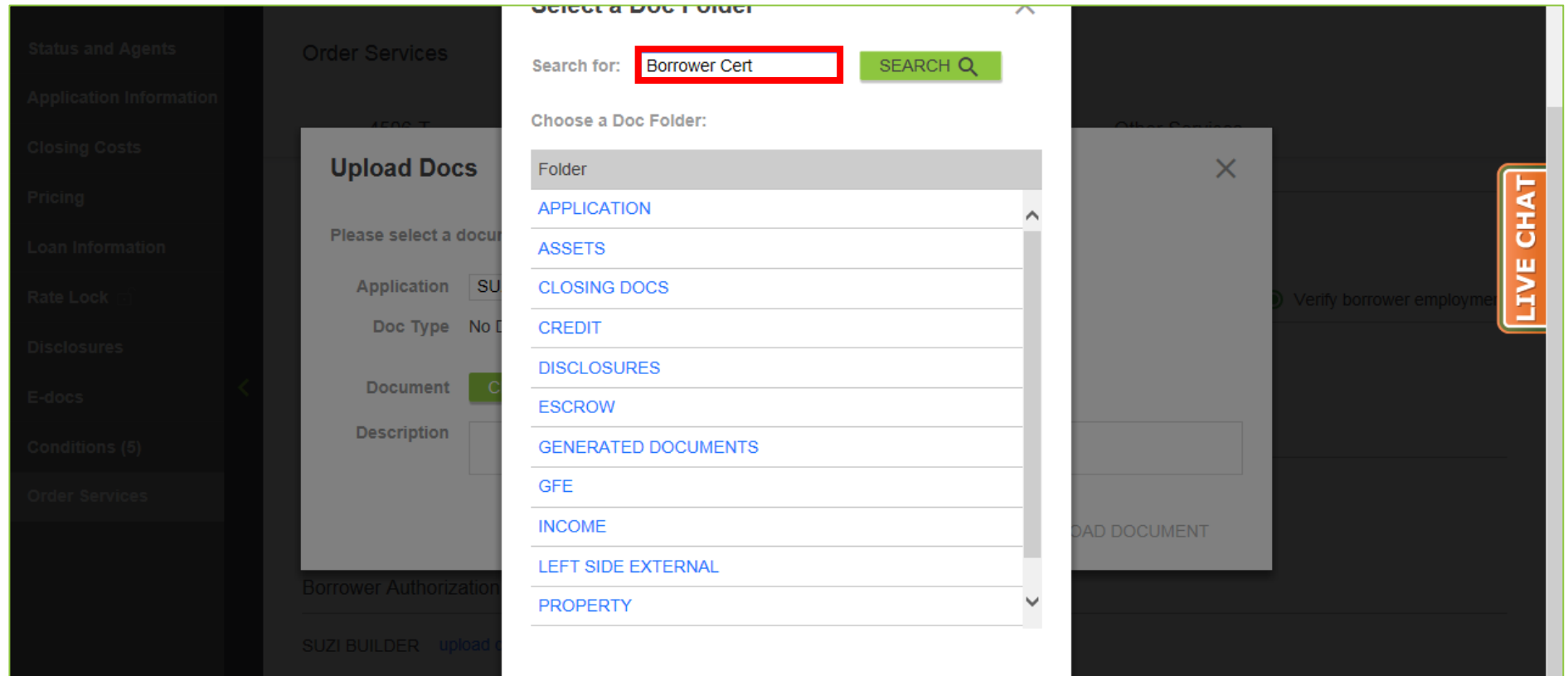
Mountain West Financial, Inc.,
Its Successors and/or Assigns
1209 Nevada Street, STE 200

FHA: 7426000000
VA: 9051040000

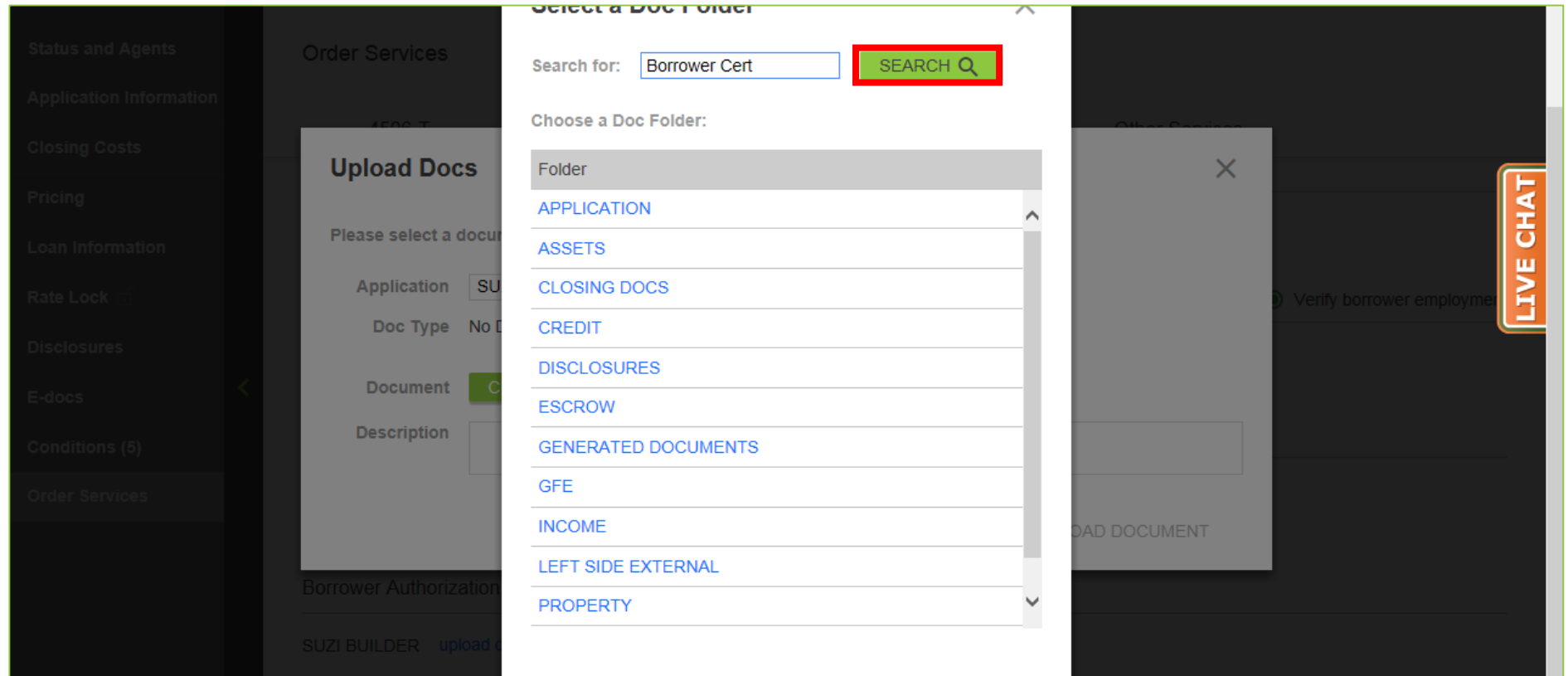
LIVE CHAT

6. Under the Borrower Authorization Documents, click on “Upload Doc”.

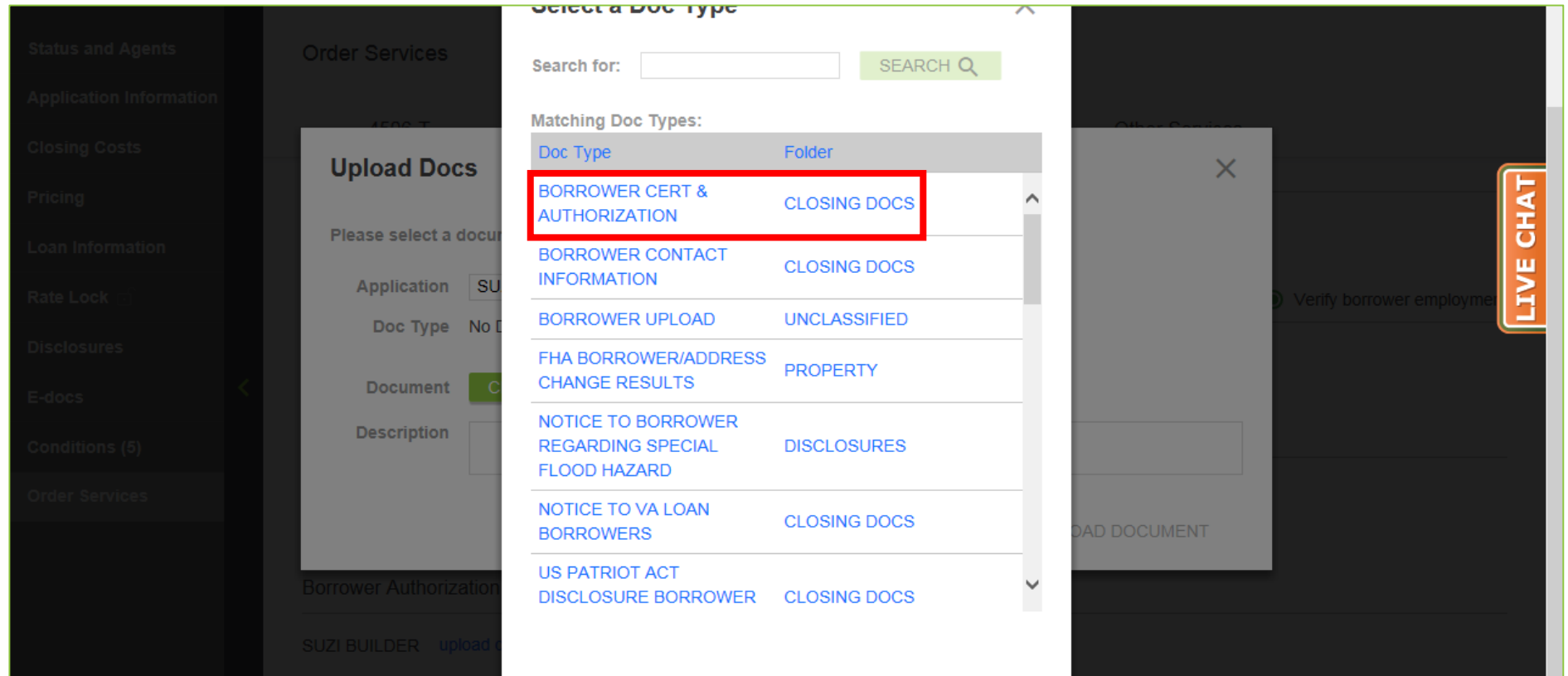
7. Click “Select Doc Type”.



8. Enter “Borrower Cert” in the Search Bar.



9. Click “Search”.



10. Click “Borrower Cert & Authorization”.

Upload Docs

Please select a document to upload for association.

Application: SUZI BUILDER

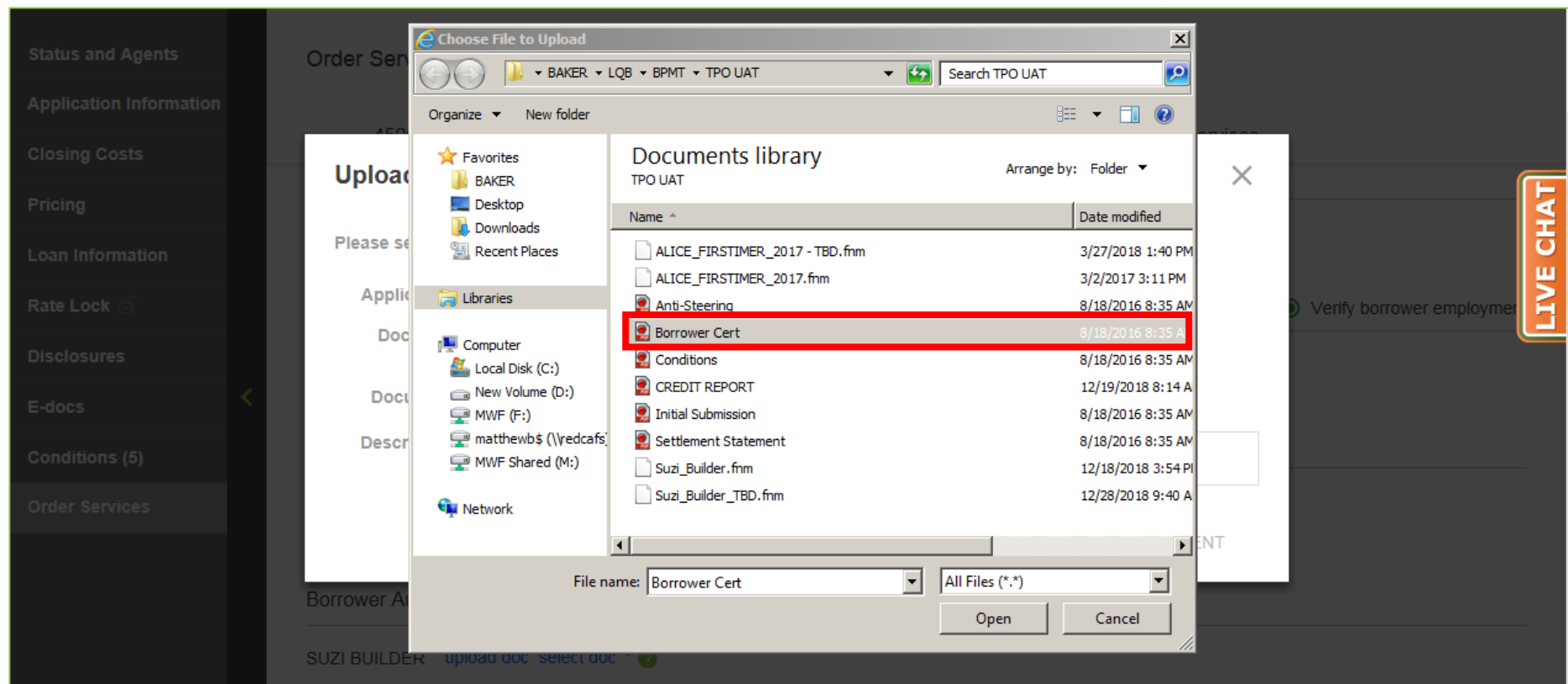
Doc Type: CLOSING DOCS : BORROWER CERT & AUTHORIZATION [change Doc Type](#) ✓

Document: **CHOOSE FILE** No file chosen ✗

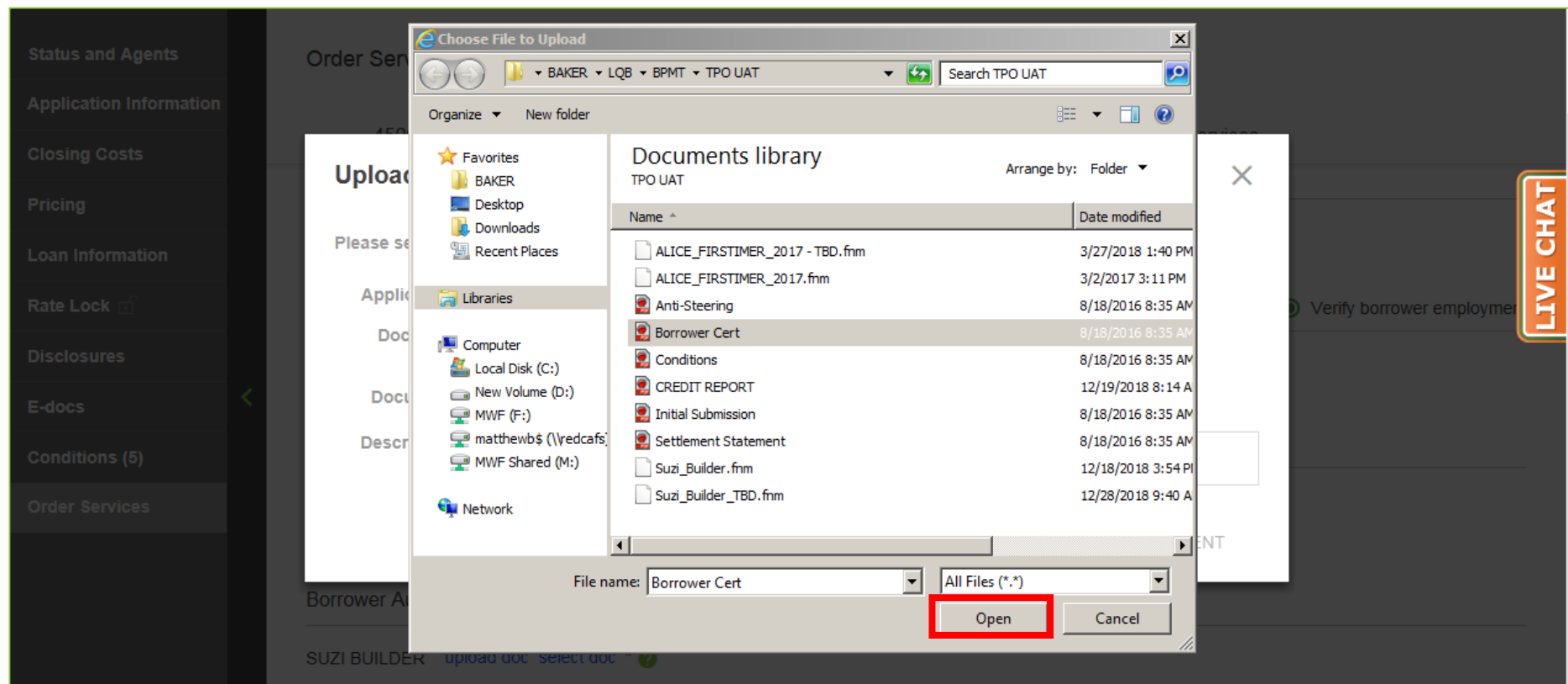
Description:

[CANCEL](#) [UPLOAD DOCUMENT](#)

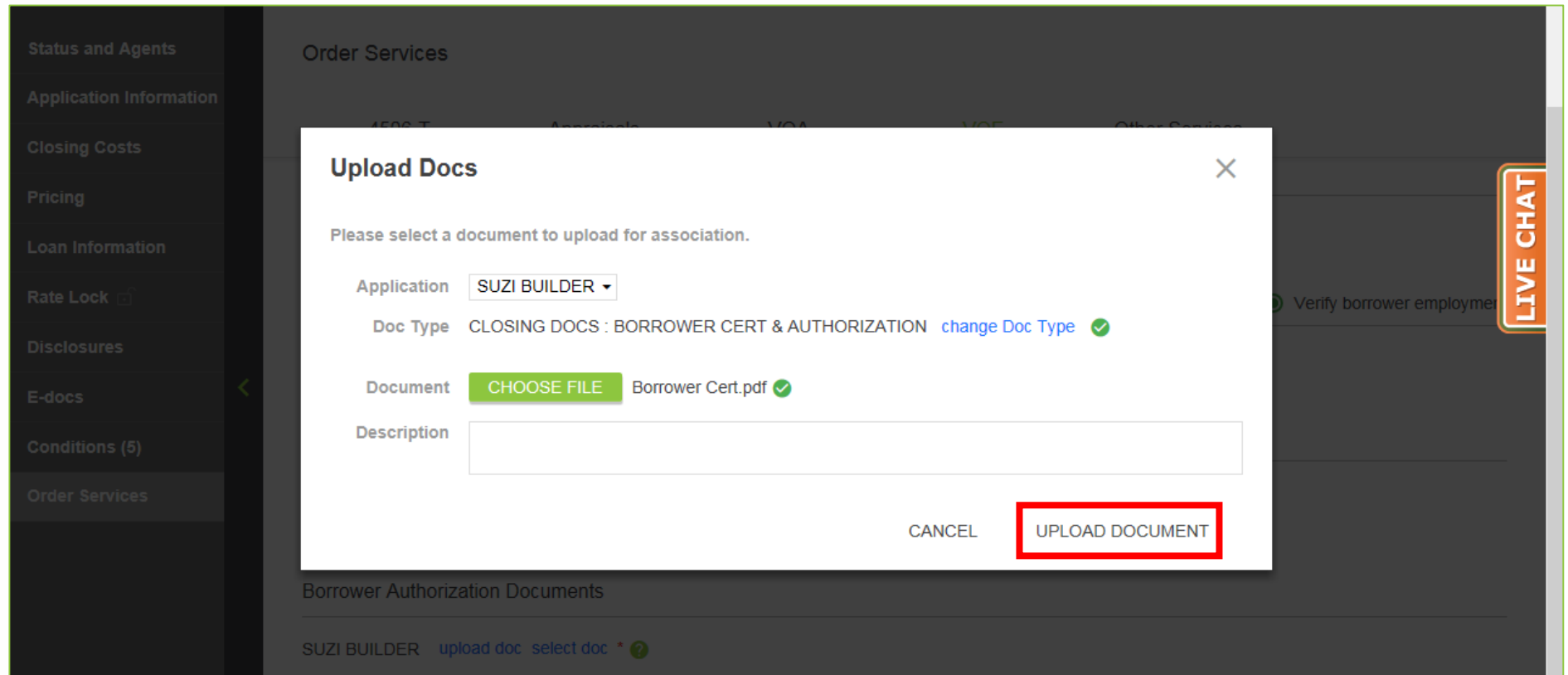
11. Click “Choose File”.



12. Find and select the Borrower's Certification and Authorization.



12. Click "Open".



Upload Docs

Please select a document to upload for association.

Application: SUZI BUILDER

Doc Type: CLOSING DOCS : BORROWER CERT & AUTHORIZATION [change Doc Type](#) ✓

Document: [CHOOSE FILE](#) Borrower Cert.pdf ✓

Description:

[CANCEL](#) [UPLOAD DOCUMENT](#)

Borrower Authorization Documents

SUZI BUILDER [upload doc](#) [select doc](#) ?

13. Click “Upload Document”.

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (5)

Order Services

BOLT VOE *

Select borrower to verify

SUZI BUILDER

Order Options

Notification Email
bolt.trainer@mwfinc.com ☒ Verify Income ☒ Use Specific Employer Record Search?

Borrower Authorization Documents

SUZI BUILDER [view doc](#) [clear doc](#)

PLACE ORDER

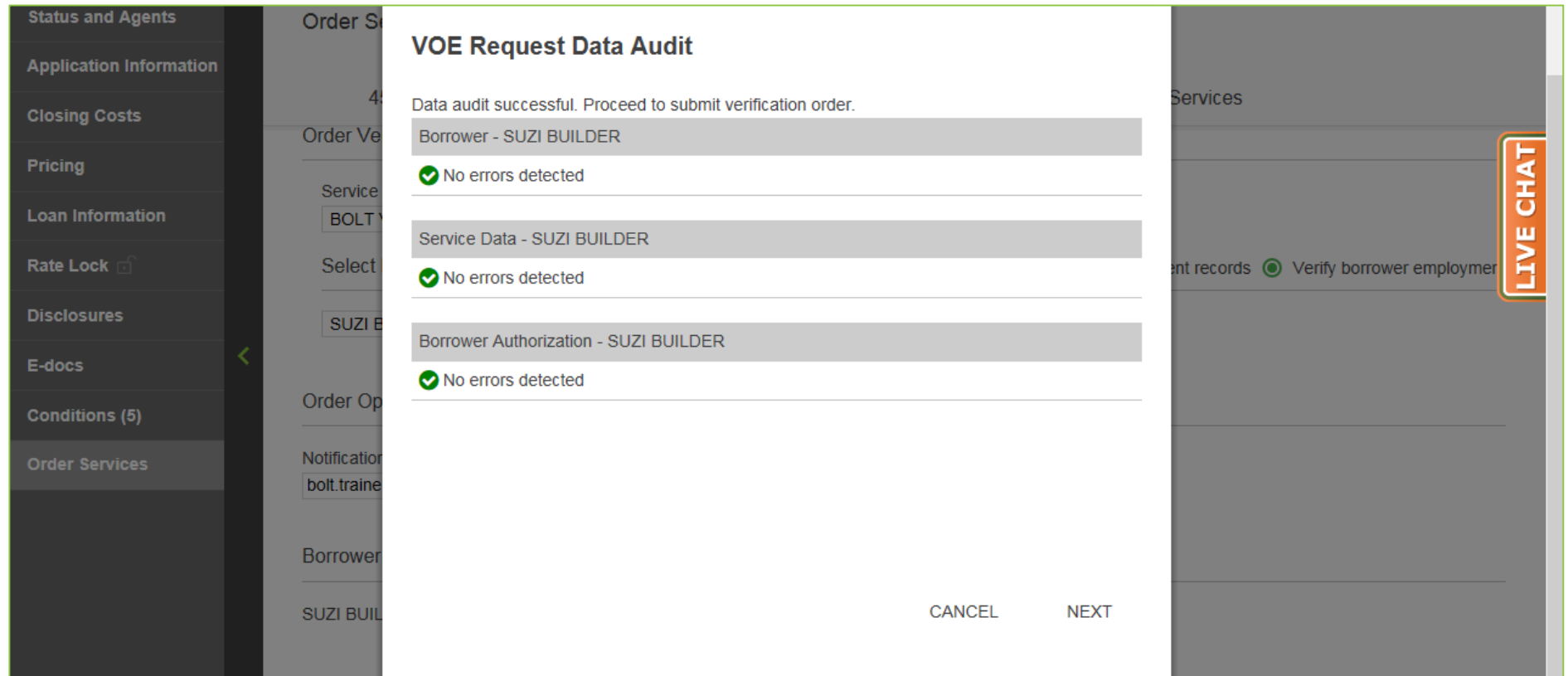
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1209 Nevada Street, STE 200

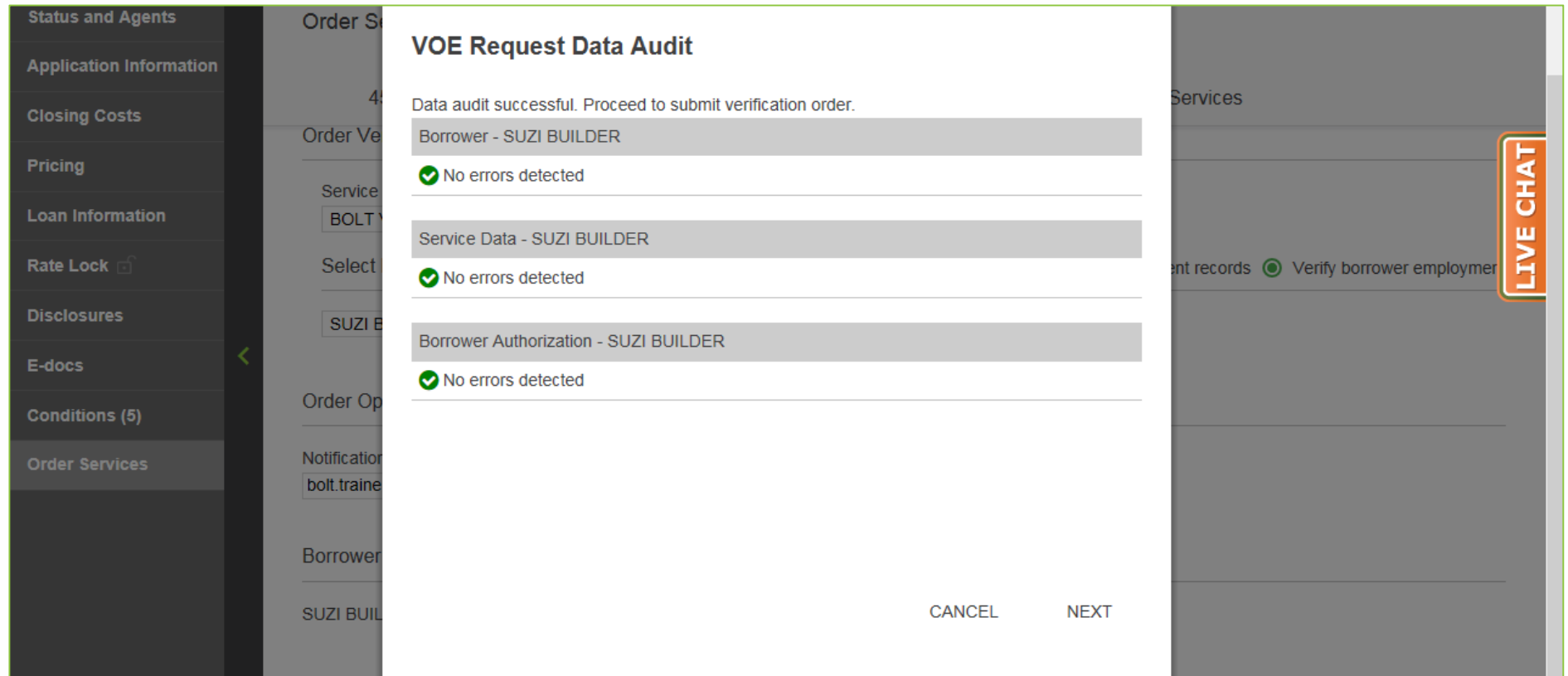
FHA: 7426000000
VA: 9051040000

LIVE CHAT

14. Click “Place Order”.

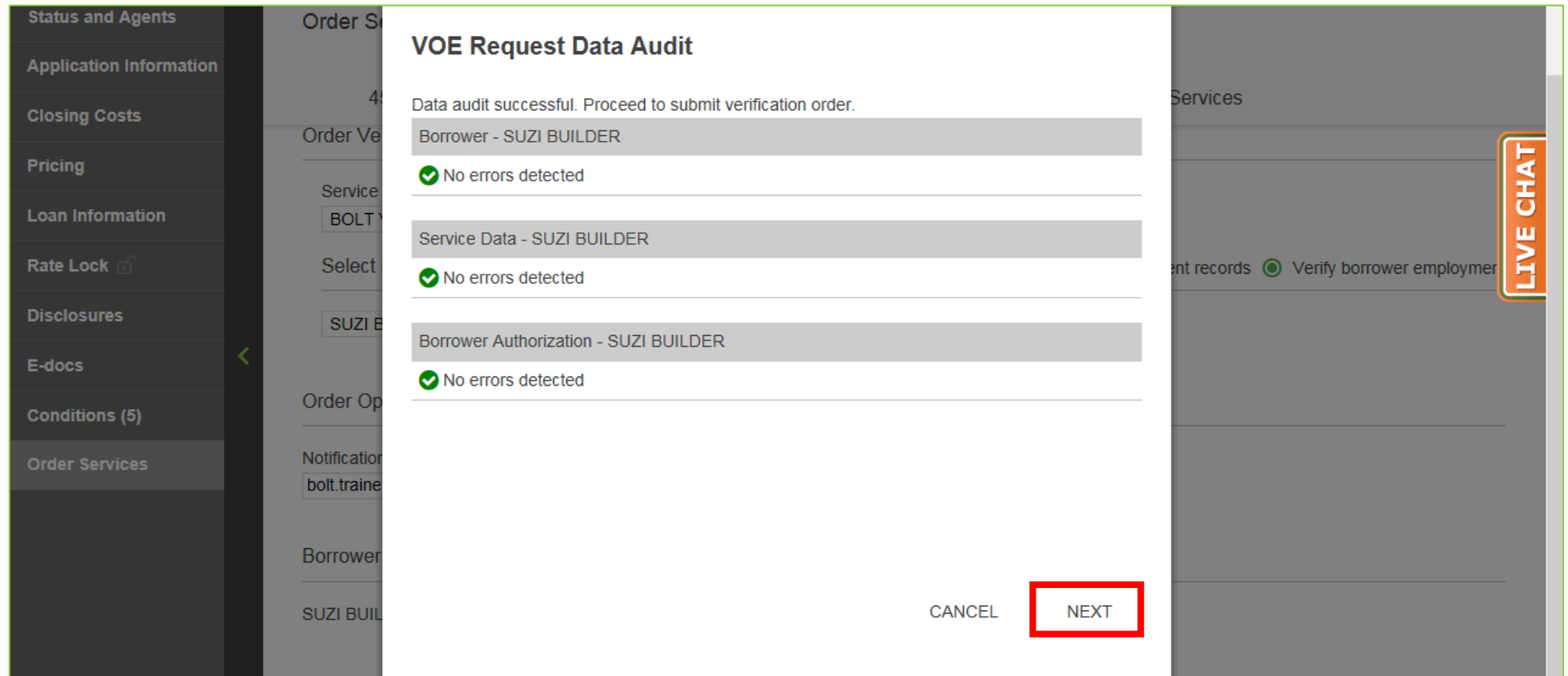


15. The VOE Request Data Audit window will appear.



If Errors Are Detected

16-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 #5, and then Step #14.



The screenshot shows a web application interface with a dark sidebar on the left containing menu items: Status and Agents, Application Information, Closing Costs, Pricing, Loan Information, Rate Lock, Disclosures, E-docs, Conditions (5), and Order Services. The main content area is partially obscured by a modal window titled "VOE Request Data Audit". The modal contains the text "Data audit successful. Proceed to submit verification order." followed by three sections, each with a green checkmark icon and the text "No errors detected": "Borrower - SUZI BUILDER", "Service Data - SUZI BUILDER", and "Borrower Authorization - SUZI BUILDER". At the bottom right of the modal are two buttons: "CANCEL" and "NEXT", with the "NEXT" button highlighted by a red rectangular border. On the far right of the application, there is a vertical orange button labeled "LIVE CHAT".

VOE Request Data Audit

Data audit successful. Proceed to submit verification order.

Borrower - SUZI BUILDER

✓ No errors detected

Service Data - SUZI BUILDER

✓ No errors detected

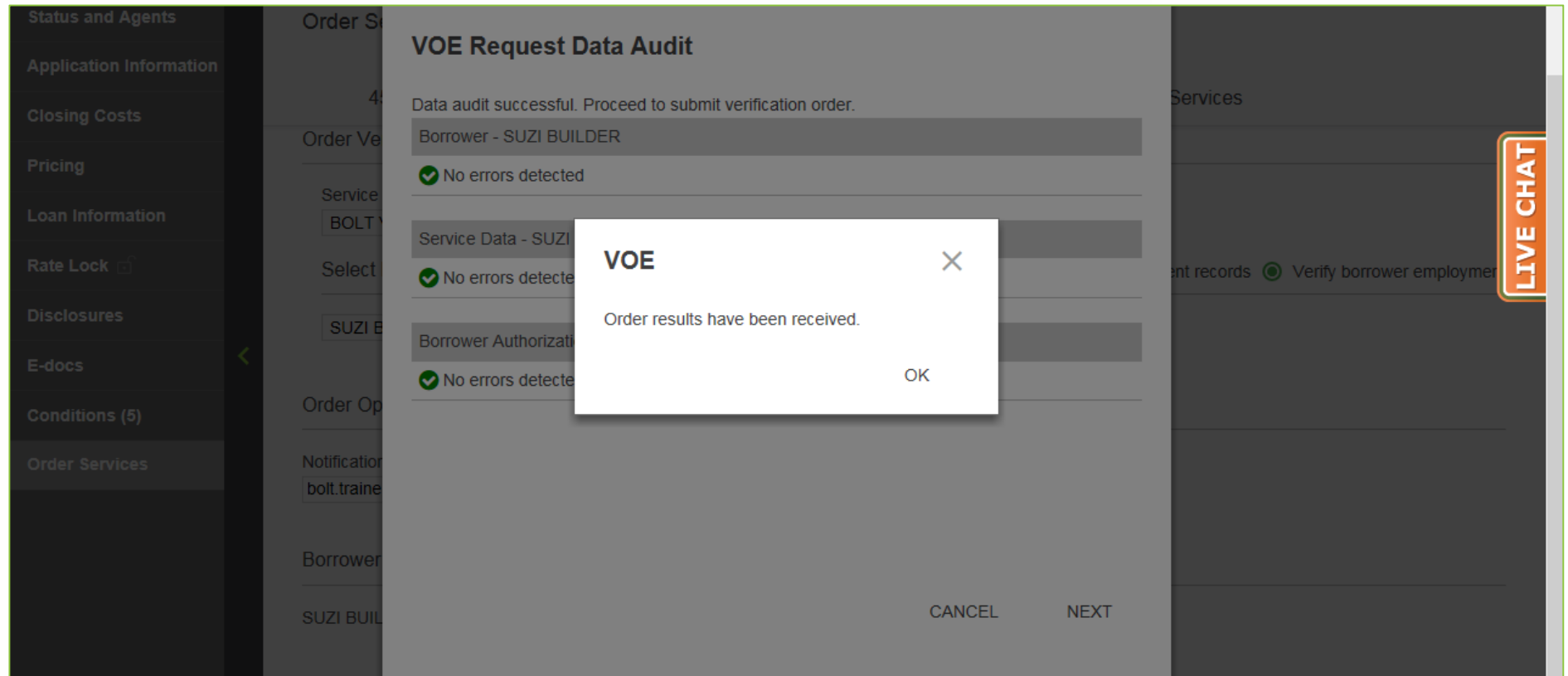
Borrower Authorization - SUZI BUILDER

✓ No errors detected

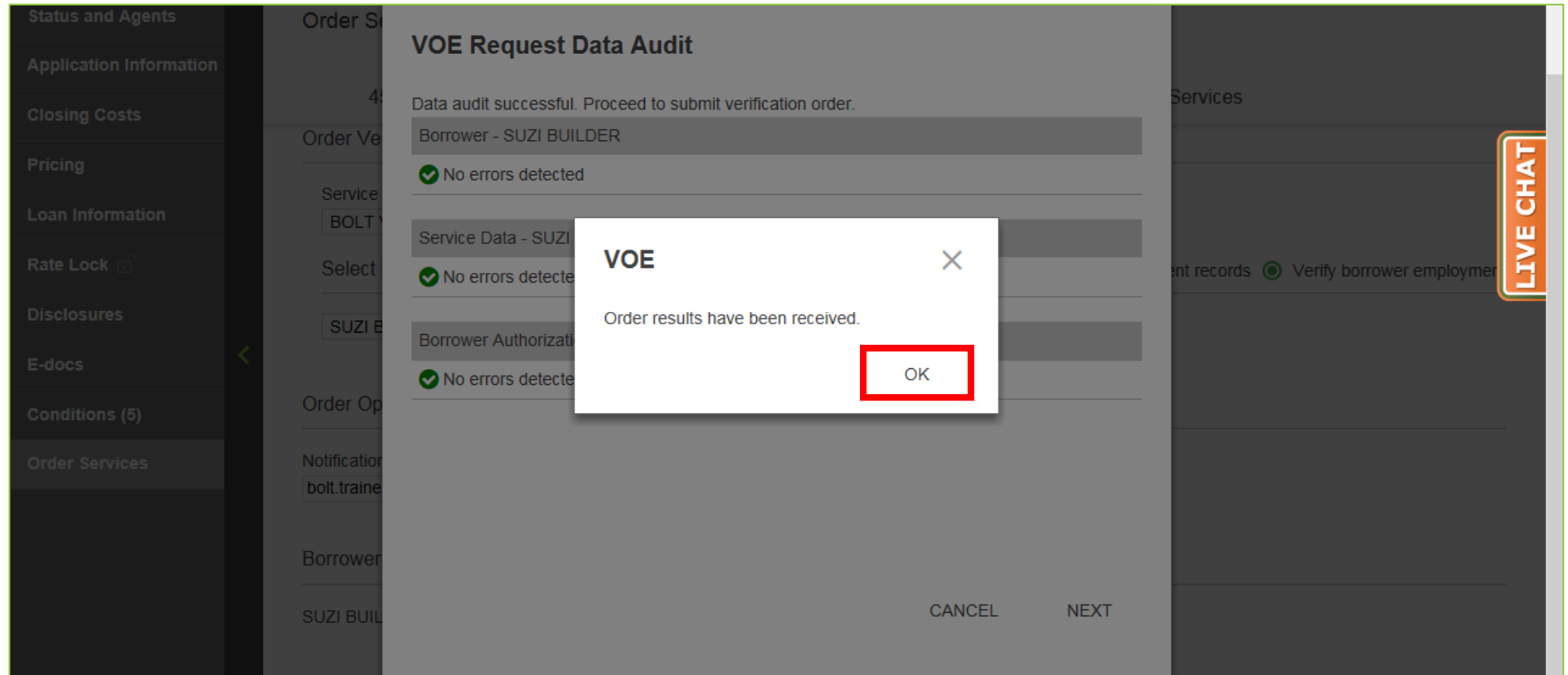
CANCEL NEXT

If No Errors Are Detected


16-B. Click "Next".



17. A confirmation window will appear.



18. Click “OK”.




Status and Agents

Application Information

Closing Costs

Pricing

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Conditions (5)

Order Services

Order Services

4506-TAppraisalsVOA**VOE**Other Services

Borrower	Employer	Service Provider	Order Number	Status	Results	Action	Date Ordered
SUZI BUILDER		BOLT VOE	2064728	Complete	VOI Order 2064728, Doc 1	re-verify	12/31/2018 10:58:23 AM

ORDER NEW VOE/VOI

LIVE CHAT

19. Click “VOI Order” for the report results.



20. Repeat Step# 1 to Step #19 for any additional Borrowers.



Important Information



Important Information

- The information from the VOE 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
 - Base Pay including Bonus & Overtime
 - Commission <25%
 - Social Security
 - Retirement Accounts
 - Self-Employed income for Schedule C



THANK YOU FOR VIEWING

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