

B.O.L.T. TRAINING

Loan Status Definitions



In This Training We Will Discuss

- Loan Status Definitions



Loan Status Definitions

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (0)

Order Services

Status and Agents

Status

Current Status: Loan Open

Status Date: 5/7/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Loan Open

5/7/2018

Registered

Funded

Agents

Assigned Agents in *MWF Test

Loan Officer [re-assign](#)

Processor [re-assign](#)

Name: Noah Rodriguez

Name: Noah Rodriguez

Email:

Email:

om

om

Phone: (909) 793-1500

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

LIVE C

Loan Open

The Loan has been imported into B.O.L.T.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (0)

Order Services

Status and Agents

Status

Current Status: Registered

Status Date: 5/10/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Loan Open

Registered

Doc Check

Funded

5/7/2018

5/10/2018

Agents

Assigned Agents in *MWF Test

Loan Officer [re-assign](#)

Processor [re-assign](#)

Name: Noah Rodriguez

Name: Noah Rodriguez

Email:

Email:

om

om

Phone: (909) 793-1500

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

LIVE C

Registered

The Interest Rate and Loan Program have been selected.

Mountain West Financial, Inc. - B.O.L.T. Training - Loan Status Definitions

01-JAN-19

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (0)

Order Services

Status and Agents

Status

Current Status: Document Check

Status Date: 5/10/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Loan Open

Registered

Doc Check

Submitted

Funded

5/7/2018

5/10/2018

5/10/2018

Agents

Assigned Agents in *MWF Test

Loan Officer [re-assign](#)

Processor [re-assign](#)

Name: Noah Rodriguez

Name: Noah Rodriguez

Email:

Email:

om

om

Phone: (909) 793-1500

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

Document Check

The loan is being reviewed by the B.O.L.T. Technicians.

Mountain West Financial, Inc. - B.O.L.T. Training - Loan Status Definitions

01-JAN-19

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (0)

Order Services

Status and Agents

Status

Current Status: Document Check Failed

Status Date: 5/10/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Loan Open

Doc Check

Doc Check Failed

Submitted

Funded

5/7/2018

5/10/2018

5/10/2018

Agents

Assigned Agents in *MWF Test

Loan Officer [re-assign](#)

Name: Noah Rodriguez

Email:

om

Phone: (909) 793-1500

Processor [re-assign](#)

Name: Noah Rodriguez

Email:

om

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

Document Check Failed

The loan did not meet submission requirements.

Mountain West Financial, Inc. - B.O.L.T. Training - Loan Status Definitions

01-JAN-19

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (0)

Order Services

Status and Agents

Status

Current Status: Loan Submitted

Status Date: 5/10/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Loan Open

Doc Check Failed

Submitted

In UW

Funded

5/7/2018

5/10/2018

5/10/2018

Agents

Assigned Agents in *MWF Test

Loan Officer [re-assign](#)

Processor [re-assign](#)

Name: Noah Rodriguez

Name: Noah Rodriguez

Email:

Email:

om

om

Phone: (909) 793-1500

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

Submitted

The loan has been submitted to Underwriting.

Mountain West Financial, Inc. - B.O.L.T. Training - Loan Status Definitions

01-JAN-19

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (1)

Order Services

Status and Agents

Status

Current Status: In Underwriting

Status Date: 5/10/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Loan Open

Submitted

In UW

Pre-Approved

Funded

5/7/2018

5/10/2018

5/10/2018

Agents

Assigned Agents in *MWF Test

Loan Officer [re-assign](#)

Processor [re-assign](#)

Name: Noah Rodriguez

Name: Noah Rodriguez

Email:

Email:

om

om

Phone: (909) 793-1500

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

In Underwriting

The loan has been assigned to an Underwriter for review.

Mountain West Financial, Inc. - B.O.L.T. Training - Loan Status Definitions

01-JAN-19

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (1)

Order Services

Status and Agents

Status

Current Status: Loan Suspended

Status Date: 5/10/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Loan Open

5/7/2018

Funded

Agents

Assigned Agents in *MWF Test

Loan Officer [re-assign](#)

Processor [re-assign](#)

Name: Noah Rodriguez

Name: Noah Rodriguez

Email:

Email:

om

om

Phone: (909) 793-1500

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

LIVE C

Suspended

The loan did not meet Underwriting requirements.


Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock 

Disclosures

E-docs

Conditions (1)

Order Services

Status and Agents

Status

Current Status: Approved

Status Date: 5/10/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Loan Open

Pre-Approved

Approved

Cond Review

Funded

5/7/2018

5/10/2018

Agents

Assigned Agents in *MWF Test

Loan Officer [re-assign](#)

Processor [re-assign](#)

Name: Noah Rodriguez

Name: Noah Rodriguez

Email:

Email:

om

om

Phone: (909) 793-1500

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

LIVE C

Approved

The loan has been Approved.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (1)

Order Services

Status and Agents

Status

Current Status: Clear to Close

Status Date: 5/10/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Loan Open

Final UW

CTC

Docs Ordered

Funded

5/7/2018

5/10/2018

Agents

Assigned Agents in *MWF Test

Loan Officer [re-assign](#)

Processor [re-assign](#)

Name: Noah Rodriguez

Name: Noah Rodriguez

Email:

Email:

om

om

Phone: (909) 793-1500

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

Clear To Close

All PTD Conditions have been cleared and the loan is ready for Docs.

Mountain West Financial, Inc. - B.O.L.T. Training - Loan Status Definitions

01-JAN-19

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (1)

Order Services

CTC

Docs Ordered

Docs Drawn

Funded

Loan Open

CTC

Docs Ordered

Docs Drawn

Funded

5/7/2018

5/10/2018

5/10/2018

Status and Agents

Status

Current Status: Docs Ordered

Status Date: 5/10/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Agents

Assigned Agents in *MWF Test

Loan Officer [re-assign](#)

Processor [re-assign](#)

Name: Noah Rodriguez

Name: Noah Rodriguez

Email:

Email:

om

om

Phone: (909) 793-1500

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

Docs Ordered

The Doc Drawer is preparing the loan documents.

Mountain West Financial, Inc. - B.O.L.T. Training - Loan Status Definitions

01-JAN-19

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (1)

Order Services

5/7/2018

5/10/2018

Loan Open

Docs Drawn

Docs Out

Docs Back

Funded

Status and Agents

Status

Current Status: Docs Out Status Date: 5/10/2018 Action: [view status certificate](#) [CHANGE LOAN STATUS](#)

Agents

Assigned Agents in *MWF Test

Loan Officer [re-assign](#)
Name: Noah Rodriguez
Email:
om
Phone: (909) 793-1500

Processor [re-assign](#)
Name: Noah Rodriguez
Email:
om
Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

Docs Out

The Docs have been sent to Escrow.

Mountain West Financial, Inc. - B.O.L.T. Training - Loan Status Definitions

01-JAN-19

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (1)

Order Services

5/7/2018

5/10/2018

5/10/2018

Loan Officer

Processor

re-assign

re-assign

Name: Noah Rodriguez

Name: Noah Rodriguez

Email:

Email:

om

om

Phone: (909) 793-1500

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

STATUS

LIVE C

Status and Agents

Status

Current Status: Docs Back

Status Date: 5/10/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Loan Open

Docs Out

Docs Back

Funding Cond

Funded

Agents

Assigned Agents in *MWF Test

Loan Officer

Processor

re-assign

re-assign

Name: Noah Rodriguez

Name: Noah Rodriguez

Email:

Email:

om

om

Phone: (909) 793-1500

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

Docs Back

The loan documents have been returned and the loan has been assigned to a Funder.

Mountain West Financial, Inc. - B.O.L.T. Training - Loan Status Definitions

01-JAN-19

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (1)

Order Services

Status and Agents

Status

Current Status: Funded

Status Date: 5/10/2018

Action: [view status certificate](#)

CHANGE LOAN STATUS

Loan Open

5/7/2018

Funding Cond

Funded

5/10/2018

Agents

Assigned Agents in *MWF Test

Loan Officer [re-assign](#)

Name: Noah Rodriguez

Email:

om

Phone: (909) 793-1500

Processor [re-assign](#)

Name: Noah Rodriguez

Email:

om

Phone: (909) 793-1500

Assigned Agents in Mountain West Financial, Inc.

Processor

Underwriter

Lender Account Executive

LIVE C

Funded

The loan has Funded.



THANK YOU FOR VIEWING

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