



WHOLESALE BULLETIN

IMPORTANT INFORMATION: PLEASE READ IMMEDIATELY

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17W-039

Attention: Business Development Managers & Mortgage Brokers

May 15, 2017

Please take a moment to read the important information contained in this bulletin.


Included in this Bulletin: **Changes to BOLT**

We are excited to announce several enhancements to BOLT designed to streamline workflow and improve the processes. Below are a few of the enhancements:

BOLT Dashboard

After logging in, the BOLT Dashboard will display. This area contains links to several useful documents, including: How To's, Product Guidelines and other reference materials.

Welcome, Michael Stainaker!



How Tos

- Importing a Loan
- Register a Loan
- Ordering DU
- Registering a VA Loan and Enter the VA Funding Fee in PML
- Registering a Loan that has a Spouse without FICO Score

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Reference

- MWF Wholesale Portal Admin Guide
- Esigning Process for Borrowers
- Quick Pricer
- Loan Status Definition
- Co-Borrower vs Co-Signer

Guidelines

- Conventional UW Manual
- HUD 4000.1 Handbook
- VA UW Manual
- USDA UW Manual
- Jumbo R UW Manual

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Turn Times

- Southwest Regional Operation Center
- NorCal Regional Operation Center
- OCLA Regional Operation Center

New Look

The loan interface has been re-designed to provide ease of navigation.

Pipeline

Loan Number: 1000025673

Borrower Name: Michael TestHSEI

Loan Amount: \$280,000.00

Property Address: TBD, Riverside, CA 92508

Loan Type: Conventional

Credit Score: 740

Status and AgentsApplication InformationClosing CostsPricingLoan InformationRate LockDisclosuresE-docsTasks (1)Conditions (0)Order Services

Status

Current Status: RegisteredStatus Date: 3/22/2017Action: [view status certificate](#)

Change Loan Status

Loan Open

Registered

Doc Check

Funded

3/22/20173/22/2017

Broker Generated Disclosures

Brokers can now seamlessly generate disclosures directly from within BOLT.

1. Select the **Disclosures** tab on the navigation bar at the top of the frame
2. Enter the **Estimated Closing** date
3. Click **Order Initial Loan Estimate**

Important Loan Dates

Application Date: 4/20/2017 ☐ Modify

Registration Date: 4/20/2017

Intent to Proceed:

Estimated Closing: 5/29/2017 ☒ Modify

Deadlines

Loan Estimate Deadlines

Deadline to Mail or Deliver Initial

Deadline for Borrower to Receive Estimate:

Order Initial Loan Estimate

Document Management

The E-docs tab within BOLT has been improved to offer an easy process to upload and view documents directly within the loan file.

Pipeline

Loan Number: 1000022912

Borrower Name: Alice Firstimer

Loan Amount: \$388,000.00

Property Address: 123 aelm street, Redlands, CA 92374

Loan Type: Conventional

Credit Score: 710

Status and AgentsApplication InformationClosing CostsPricingLoan InformationRate LockDisclosuresE-docsTasks (2)Conditions (2)Order Services

Document Upload

Submit to Document Check

	Status	Doc Type	Application	Description	Created Date	Pages
view PDF		INCOME - W2	Alice Firstimer		3/28/2017 12:20:12 PM	1
view PDF		DISCLOSURES - SETTLEMENT STATEMENT/ESTIMATED CD	Alice Firstimer	Use for CD	1/30/2017 12:37:27 PM	2

Uploading Documents

The process for uploading documents to the loan file has been streamlined. Many non-useful options have been removed, such as: Fax, barcodes and the cumbersome process of selecting a Doc Type for each uploaded document. Users now simply select the Document Upload button.

				<div>Document Upload</div> <div>Submit to Document Check</div>		
	Status	Doc Type	Application	Description	Created Date	Pages
view PDF		CREDIT - CREDIT REPORT	ALICE FIRSTIMER	Credit Report	4/6/2017 1:54:11 PM	5

This will open a page containing upload links specific to the phase of the loan. As an example, newly submitted loans will display links to upload submission documents as well as specific items, such the Purchase Contract or Borrower Signed Disclosures.

Confirmation To:

Purchase Contract

Borrower Signed Disclosures

New Loan Submission

Additional information and training resources:

[BOLT User Guide](#)

[BOLT Training Video](#)

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