B.O.L.T. TRAINING
TBD Loan Process
In This Training We Will Discuss

- TBD Loan Process
  - Prior To Pre-Approval
  - After Pre-Approval
- Important Information
TBD Loan Process

Prior To Pre-Approval
1. Create a new loan. View Lesson 08 - Creating a New Loan for more information.
2. Price the loan. View Lesson 09 - Pricing a Loan for more information.
3. Register the loan. View Lesson 10 - Registering or Locking a Loan for more information.
4. Run the AUS. View **Lesson 11 - Running Desktop Underwriter (DU)** or **Lesson 12 - Running Loan Product Advisor (LPA)** for more information.
5. Submit the loan to Underwriting. View Lesson 19 - Submitting a Loan to Underwriting for more information.
6. Once the Underwriter has Pre-Approved the loan, the Loan Status will reflect “Pre-Approved”.
TBD Loan Process

After Pre-Approval
1. Once the Purchase Contract is received, within a loan, click “Pricing”.
2. Enter Subject Property Address.

This will trigger RESPA and start the 3 day time frame to Disclose.
3. Change any information needed prior to Disclosing, if applicable.
4. Disclose the loan. See **Lesson 14 - Issuing Initial Disclosures** for more information.
5. Within a loan, click “E-Docs”.
6. Click “Document Upload”.

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The Document Upload page will appear.
8. Confirm the Confirmation To email is correct.
9. Enter additional emails, if needed.
10. Click “Additional Submission Documents”.

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11. Click “Add Files”.
14. Find and select all the documents needed.
15. Click “Open”.
16. Click “Upload Files”.
17. A confirmation window will appear.
18. Click “OK”.

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Two confirmation emails will also be sent, one when the documents are initially uploaded through the link, and one when the documents are validated/viewable in the loan.
20. The E-Docs page will return.
Important Information
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• The Subject Property Address must reflect “TBD” or “To Be Determined”.
  • Any variation from this will trigger RESPA and start the 3 Day time frame to Disclose, which could result in the loan being Canceled, if not Disclosed on-time.
THANK YOU FOR VIEWING

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