JOB AID: Loan Submission

Practical guidance for CWL brokers & partners

Community Wholesale Lending

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Version: 1.0   Date: 08/25/2025

Community Wholesale Lending
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1. Overview

This job aid provides step-by-step guidance on loan submission in the CWL system, including managing borrowers, uploading underwriting packages, and requesting document checks.

1. Loan Submission Screen

- Navigate to the Loan Submission screen. (you will be prompted to submit your loan, once disclosures have been ordered)

- This section will allow you to see the process of your loan as it works through the system

Figure 1. Loan Submission Screen

2. Manage Borrowers

- Confirm borrowers are paired correctly.

- Upon uploading a loan with <u>married applicants</u>, you need to confirm the borrowers are paired in P.A.R.C. before proceeding
- Select on the "additional application" borrower and drag them to the Primary Application section
- "confirm borrower pairs are correct and select next

Figure 2. Primary Application View

3. Confirm Borrower Pairings

- Drag and drop applicants to ensure proper pairing.

Figure 3. Confirming Borrower Pairings

4. Loan Progress

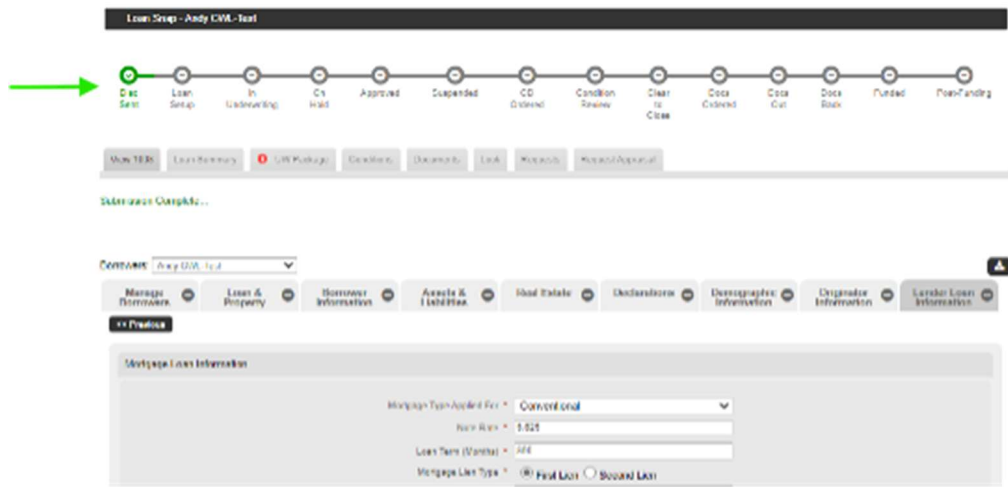- Review the process of the loan as it works through the system.

Figure 4. Loan Progress Tracking

5. Upload UW Package

- Upload your loan documents by browsing or dragging and dropping into the system.

- Select to "browse" for your documents or "drag and drop"
- Select "package documents"
- Once all documents have been selected, click "upload"

6. Request Document Check

- Once all documents have been uploaded and your file is ready to be submitted to UW, select 'Request Document Check' to finalize submission.

Figure 6. Requesting Document Check

💡 TIP: Always confirm borrower pairing before proceeding.

⚠ WARNING: Do not skip required documents, as it will delay submission.

3. Quick Tips / Common Errors to Avoid

✓ Always confirm borrower pairing before proceeding.

✓ Ensure all required documents are uploaded before requesting a document check.

4. Support

Need help? Contact CWL Support at parcsupport@cwlend.com.