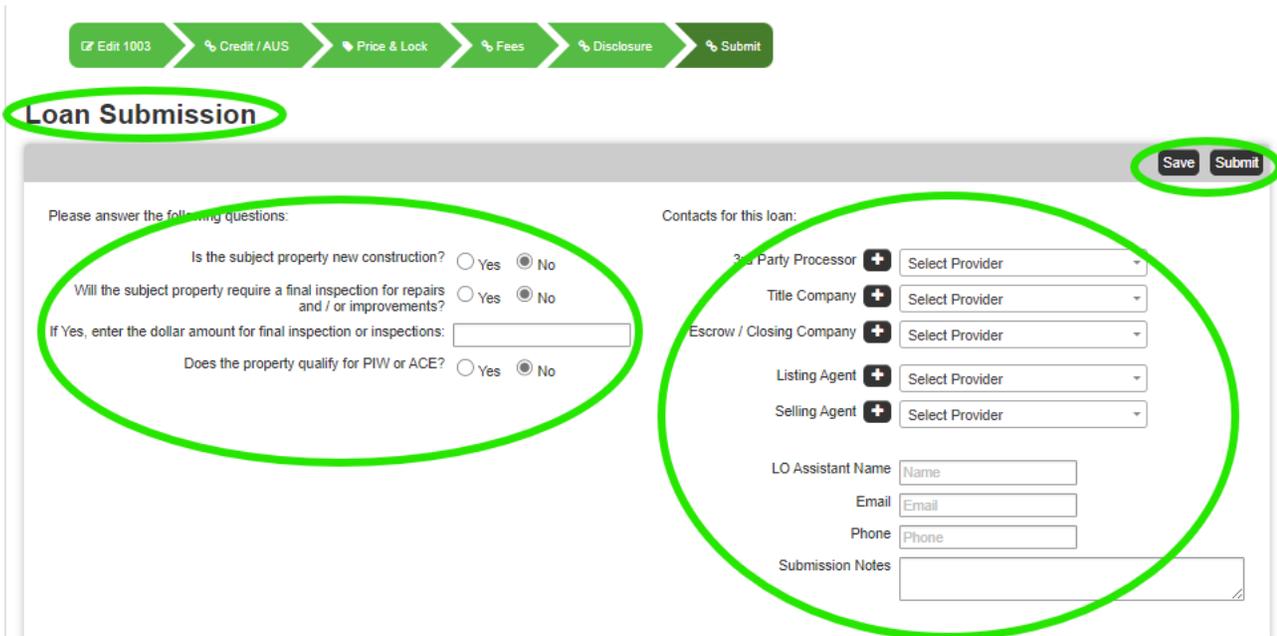


## Job Aid: Loan Submission

INITIAL DATE: 10-7-2024

REVISION DATE: 10-7-2024

- Loan Submission (you will be prompted to submit your loan, once disclosures have been ordered)
  - Please be sure to complete the Loan Submission screen
  - Once the con



Edit 1003  
  Credit / AUS  
  Price & Lock  
  Fees  
  Disclosure  
  Submit

**Loan Submission**

**Save** **Submit**

Please answer the following questions:

Is the subject property new construction?  Yes  No

Will the subject property require a final inspection for repairs and / or improvements?  Yes  No

If Yes, enter the dollar amount for final inspection or inspections:

Does the property qualify for PIW or ACE?  Yes  No

Contacts for this loan:

Third Party Processor  Select Provider

Title Company  Select Provider

Escrow / Closing Company  Select Provider

Listing Agent  Select Provider

Selling Agent  Select Provider

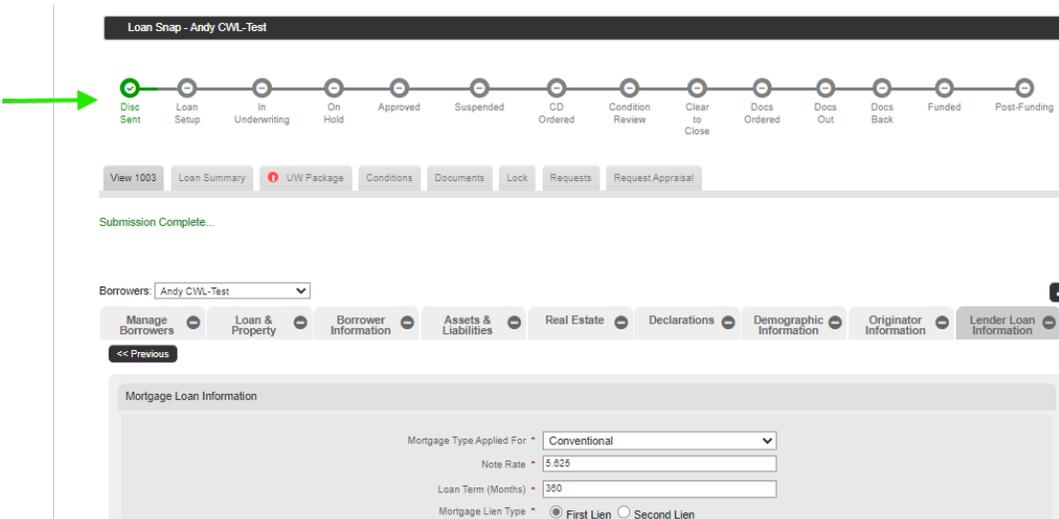
LO Assistant Name

Email

Phone

Submission Notes

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



Loan Snap - Andy CWL-Test

Disc Sent  
  Loan Setup  
  In Underwriting  
  On Hold  
  Approved  
  Suspended  
  CD Ordered  
  Condition Review  
  Clear to Close  
  Docs Ordered  
  Docs Out  
  Docs Back  
  Funded  
  Post-Funding

Submission Complete...

Borrowers:

<< Previous

Mortgage Loan Information

Mortgage Type Applied For:

Note Rate:

Loan Term (Months):

Mortgage Lien Type:  First Lien  Second Lien

- **Manage Borrowers (don't skip this step)**
  - Upon uploading a loan with married applicants, 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

Borrowers: Andy CWL-Test

Manage Borrowers | Loan & Property | Borrower Information | Assets & Liabilities | Real Estate | Declarations | Demographic Information | Originator Information | Lender Loan Information

Next >>

**Manage Borrowers**

Please arrange your borrower pairs by selecting a borrower icon and dropping them into the desired borrower pair and position.

**Primary Application**

Borrower  
Andy CWL-Test  
info@cwlend.com  
Birthdate: 02/28/1967

**Additional Application**

Borrower  
Amy CWL-Test  
info@cwlend.com  
Birthdate: 01/31/1967

**Confirm Pairings**

**\*\*IMPORTANT\*\* If borrowers are on a joint credit report, both must be dragged to primary applicant line. Do not confirm pairs prior to completing.**

Confirm Borrower Pairs are Correct

- You can now view the application and make any necessary changes

Borrowers: Andy CWL-Test

Manage Borrowers | Loan & Property | Borrower Information | Assets & Liabilities | Real Estate | Declarations | Demographic Information | Originator Information | Lender Loan Information

Next >>

**Manage Borrowers**

Please arrange your borrower pairs by selecting a borrower icon and dropping them into the desired borrower pair and position.

**Primary Application**

Borrower  
Andy CWL-Test  
info@cwlend.com  
Birthdate: 02/28/1967

Co-Borrower  
Amy CWL-Test  
info@cwlend.com  
Birthdate: 01/31/1967

- UW Package; Uploading your loan documents
  - Select to “browse” for your documents or “drag and drop”
  - Select “package documents”
  - Once all documents have been selected, click “upload”

Loan Snap - Andy CWL-Test

Disc Sent, Loan Setup, In Underwriting, On Hold, Approved, Suspended, CD Ordered, Condition Review, Clear to Close, Docs Ordered, Docs Out, Docs Back, Funded, Post-Funding

View 1003, Loan Summary, **UW Package**, Conditions, Documents, Lock, Requests, Request Appraisal

This loan is ready to request Document Check: **Request Document Check**

Package Documents	Status
<input type="checkbox"/> INITIAL 1003	Optional
<input type="checkbox"/> BORROWER'S CERTIFICATION & AUTHORIZATION-B	Optional
<input type="checkbox"/> EXECUTED PURCHASE AGREEMENT	Optional
<input type="checkbox"/> W-2'S BORROWER	Optional
<input type="checkbox"/> W-2'S CO-BORROWER	Optional
<input type="checkbox"/> PAYSTUBS CO-BORROWER	Optional
<input type="checkbox"/> PAYSTUBS BORROWER	Optional
<input type="checkbox"/> BANK STATEMENTS	Optional
<input type="checkbox"/> PRELIM TITLE REPORT	Optional
<input type="checkbox"/> AUS CERTIFICATE (DO/DULP/GUS FINDINGS)	Optional
<input type="checkbox"/> LETTER OF EXPLANATION	Optional
<input type="checkbox"/> APPRAISAL Including SSR's, Invoices, Appraisal Delivery & Compliance Cert	Optional
<input type="checkbox"/> ESCROW INSTRUCTIONS	Optional
<input type="checkbox"/> CLOSING FEE WORKSHEET	Optional
<input type="checkbox"/> UNCLASSIFIED	Optional
<input type="checkbox"/> Other Description	

1. Check the documents from the list that are included in your file
2. Click "Browse" or Drag & Drop your file in the box below
3. Click the "Upload" button

**Browse** Drag & Drop Files

**Upload**

File types supported: pdf. Max file size = 200MB

Uploaded Documents	
disclosure_contacts.pdf	Disclosure Submission Form
initial_disclosures.pdf	Initial Disclosures
initial_disclosures_preview.pdf	Initial Disclosures

- Once all documents have been uploaded, and your file is ready to be submitted to underwriting, select "request document check"

Loan Snap - Andy CWL-Test

Disc Sent, Loan Setup, In Underwriting, On Hold, Approved, Suspended, CD Ordered, Condition Review, Clear to Close, Docs Ordered, Docs Out, Docs Back, Funded, Post-Funding

View 1003, Loan Summary, **UW Package**, Conditions, Documents, Lock, Requests, Request Appraisal

This loan is ready to request Document Check: **Request Document Check**

Package Documents	Status
<input checked="" type="checkbox"/> INITIAL 1003	✓
<input checked="" type="checkbox"/> BORROWER'S CERTIFICATION & AUTHORIZATION-B	✓
<input checked="" type="checkbox"/> EXECUTED PURCHASE AGREEMENT	✓
<input checked="" type="checkbox"/> W-2'S BORROWER	✓
<input checked="" type="checkbox"/> W-2'S CO-BORROWER	✓
<input checked="" type="checkbox"/> PAYSTUBS CO-BORROWER	✓
<input checked="" type="checkbox"/> PAYSTUBS BORROWER	✓
<input checked="" type="checkbox"/> BANK STATEMENTS	✓
<input checked="" type="checkbox"/> PRELIM TITLE REPORT	✓
<input checked="" type="checkbox"/> AUS CERTIFICATE (DO/DULP/GUS FINDINGS)	✓
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<input checked="" type="checkbox"/> APPRAISAL Including SSR's, Invoices, Appraisal Delivery & Compliance Cert	✓
<input checked="" type="checkbox"/> ESCROW INSTRUCTIONS	✓
<input checked="" type="checkbox"/> CLOSING FEE WORKSHEET	✓
<input checked="" type="checkbox"/> UNCLASSIFIED	✓
<input type="checkbox"/> Other Description	

1. Check the documents from the list that are included in your file
2. Click "Browse" or Drag & Drop your file in the box below
3. Click the "Upload" button

**Browse** Drag & Drop Files

**Upload**

File types supported: pdf. Max file size = 200MB

Uploaded Documents	
CWL_SSA89_form_04.23.pdf	INITIAL 1003 BORROWER'S CERTIFICATION & AUTHORIZATION-B EXECUTED PURCHASE AGREEMENT W-2'S BORROWER W-2'S CO-BORROWER PAYSTUBS CO-BORROWER PAYSTUBS BORROWER BANK STATEMENTS PRELIM TITLE REPORT AUS CERTIFICATE (DO/DULP/GUS FINDINGS) LETTER OF EXPLANATION APPRAISAL ESCROW INSTRUCTIONS CLOSING FEE WORKSHEET UNCLASSIFIED
disclosure_contacts.pdf	Disclosure Submission Form
initial_disclosures.pdf	Initial Disclosures
initial_disclosures_preview.pdf	Initial Disclosures