



## Loan Officer – “Ready for Processing” Request

Business Solutions has added fields to the “Retail Lead Processing Checklist” screen.

The purpose of the “Ready for Processing” date field is to allow for timely delivery of a loan to our processing team’s work queues. Operations and Sales Management will also be included in the task email for visibility.

The “Ready for Processing” date is only editable to the Loan Officer profile. Prior to inputting this date, the Loan Officer should confirm that the minimum submission requirements have been met.

When this date is entered, a task for the Jr. Processor and Loan Processor will be created. This will allow for transparency on new files and the timing of title/appraisal ordering and initial Loan Processor review.

### New Tasks auto created:

Description	Assigned To	Assigned Role
LO - New Loan Review		Loan Processor
LO- File Ready For Processing		JR Processor

### A note will also be auto added to the conversation log:

🚩	06/27/2022 10:08 AM		File ready for processing; tasks set for Jr Processor and Loan Processor review
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## ITP VALIDATION


There is a hard stop validation that will popup if the Intent to Proceed Date is blank on a TRID loan when the “Ready for Processing” date is attempted to be entered. Loan Officer should contact the borrower if an Acra Intent to Proceed has not yet been returned.

Disclosure Processing will upload the signed disclosures to Doc Velocity and update the Intent to Proceed date in Byte Pro.

**TRID Compliance**

Initial Disclosures Uploaded to DV

Intent to Proceed Date  ☐ Non-TRID

[Ready for Processing](#)  ☒ 

BytePro Enterprise ×

Acra ITP has not yet been received. LO must follow up with borrower.  
ITP must be received prior to moving forward.

OK