Asst. TM Training Checklist

Name ______________________ Hire Date ______________________

Position ______________________ Manager ______________________

Facilitator(s) ______________________

Task Reviewed	Date Completed	Trainee Initials	Facilitator Initials
Processes:			
General Housekeeping: - Time punches/punctuality		☐	☐
- Breaks/ Start Times		☐	☐
- Away from desk sign, etc		☐	☐
File Flow Process		☐	☐
Discuss importance of including TM/AEs on communication to brokers		☐	☐
AEs/Brokers not to be included on internal OPS emails		☐	☐
How to send AE Pipeline Reports (Mondays/Thursdays)		☐	☐
Set up all email templates		☐	☐
Vetting		☐	☐
How to correctly process CSC ITP in Byte Pro, DV and communication to Broker/AE		☐	☐
File escalations		☐	☐
BPO Check email – communication to accounting – Payment Restrictions		☐	☐
How to Order a BPO (Proteck, Consolidated, ServiceLink)		☐	☐
Review Appraisals Cleared Report #4400 and review for vetting; set task if needed		☐	☐
Send out AE Pipeline Reports/Condition Reports		☐	☐
Condition delivery/upload process/tasking to UW		☐	☐
BOX – Sync/drag and Drop/Moving to correct folders		☐	☐
Sending Initial Loan Approvals		☐	☐
Sending Suspense Notices		☐	☐
Sending Decline Notices		☐	☐
Clearing tasks/documenting Conversation Log		☐	☐
Requesting Doc Order Form and Settlement Agent Fee Confirmation		☐	☐
- What to look for to ensure forms are completed correctly		☐	☐
TM Forecast: Importance of updating, Hot List button, etc.		☐	☐
Cond #4105 – TRID Calendars/Expiration Date Calendar		☐	☐
Overview of CSC closing process (including but not limited to email templates, etc)		☐	☐
Re-Disclosure FAQ's; Verifying if UW Tasked File		☐	☐
Monitoring Emails for TM Out of Office		☐	☐
TM Follow Ups - Aged Loan Policy		☐	☐
CPL/ Wire Requests		☐	☐
ATM Doc Prep to Assist with CD/DOC Prep Requests		☐	☐
Sending Revised Approvals		☐	☐
Description of Tasks/ When to Use Each Task		☐	☐
Program Flyers		☐	☐
BytePro Color Code and Status Desriptions		☐	☐
How to Cancel a File Out of BytePro		☐	☐
Status Screen - Ready for Docs/ Cancelled		☐	☐

Asst. TM Training Checklist

Name ______________________ Hire Date ______________________

Position ______________________ Manager ______________________

Facilitator(s)______________________

Task Reviewed	Date Completed	Trainee Initials	Facilitator Initials
Tasks:			
Creating Tasks for suspense condition review		☐	☐
Creating Tasks for vetting		☐	☐
Creating Tasks for Flood and when to task		☐	☐
Creating Tasks to UW & valuation review		☐	☐
Creating Tasks for POA & Entity review when needed		☐	☐
Creating Tasks for CD or Early Doc prep		☐	☐
Creating Tasks for Docs		☐	☐
Clearing Task: When loan approval comes out		☐	☐
Clearing Task: When updated loan approval comes out		☐	☐
Notes:			