



CD-Initial Doc Prep Second Review Process

(Effective 11/20/19)

Effective, Tuesday, 11/26/19, all Doc Drawers must begin using the Second Review process when a file is being submitted for second review.

STEP 1.

Doc Drawer to select the “assigned” “Second Review team member listed in the Doc Drawer – 2nd drop down.

HOME SCREEN

FILE ASSIGNMENTS	
Account Executive	JesseK
Transaction Manager	YStacey
JR Transaction Manager	[Not Assigned]
Disclosure Processor	lytaA
Disclosure Supervisor	JorgeM
Assistant TM	DianaJ
Underwriter	RGlover
Doc Drawer	RMariucci
Doc Drawer - 2nd	[Not Assigned]
Funder	[Not Assigned]

STEP 2.

Doc drawer to submit for CD 2nd Review using the new CD/DOC PREP REVIEW SUBMITTED field located at the bottom of the CD-INITIAL DOC PREP screen. A note will be automatically added to the conversation log to document that the file has been submitted for second review.

The Doc Drawer must “send” the task email to the assigned second review team member.

CD/Doc Prep Review Submitted		
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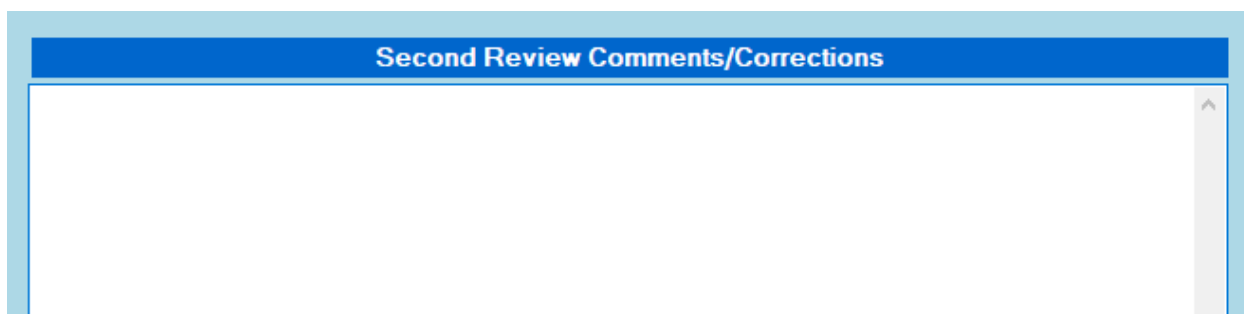
11/20/2019 5:36 PM		CD/Doc Prep Review request submitted for second review
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STEP 3.

NEW SCREEN

CD-Initial Doc Prep Screen
CD-Initial Doc Prep Second Review Screen
Changed Circumstances

Second Review team member to complete the checklist on the CD-Initial Doc Prep Second Review Screen. The Second Review team member must review and validate the data in Byte Pro, compared to the documents in DV. Once all questions have been answered, the Second Review team member is to document the findings/corrections to be completed by the Doc Drawer.



STEP 4.

The Second Review team member will input the date the review was completed so that the file can be tasked back to the Doc Drawer. A note will be automatically added to the conversation log to document that the doc prep review was completed.

It is the responsibility of the doc drawer to make all corrections identified and if additional assistance or clarification is needed, the doc drawer should escalate to Funding Management.



11/20/2019 5:40 PM		CD/Doc Prep Review Completed; Doc Drawer must complete all corrections outlined
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