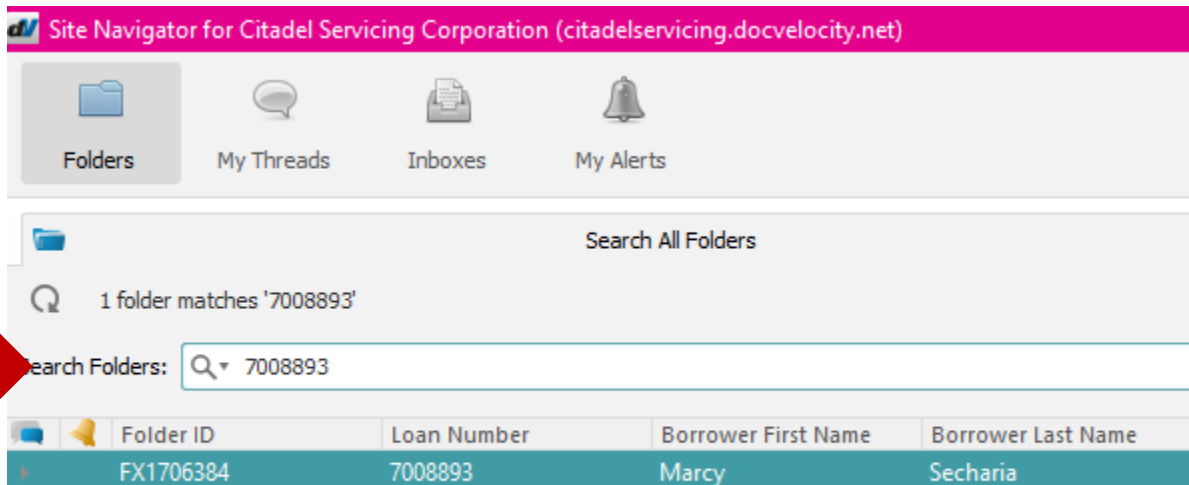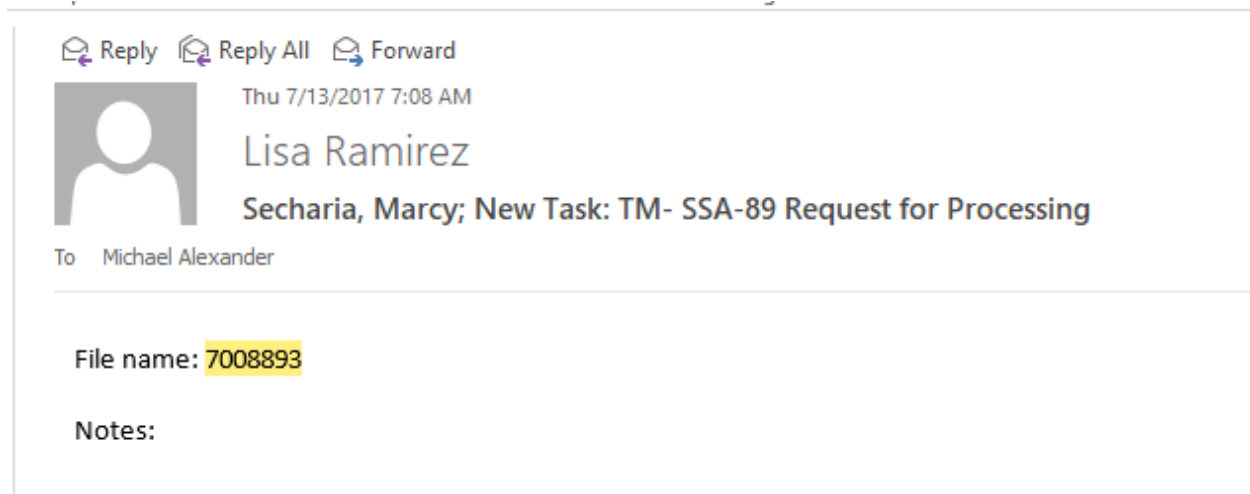# PROCESSING SSA-89 – Informative Research

(Revised 08/29/2017)

The TM will create a TASK in Byte Pro requesting the SSA-89 to be processed. Below is a SAMPLE email that you will receive when this task has been created "TM- SSA-89 Request for Processing".

From the home page of DV, enter the loan number in SEACRH FOLDERS and press enter. The file will pop up highlighted in green. Double click to open it.
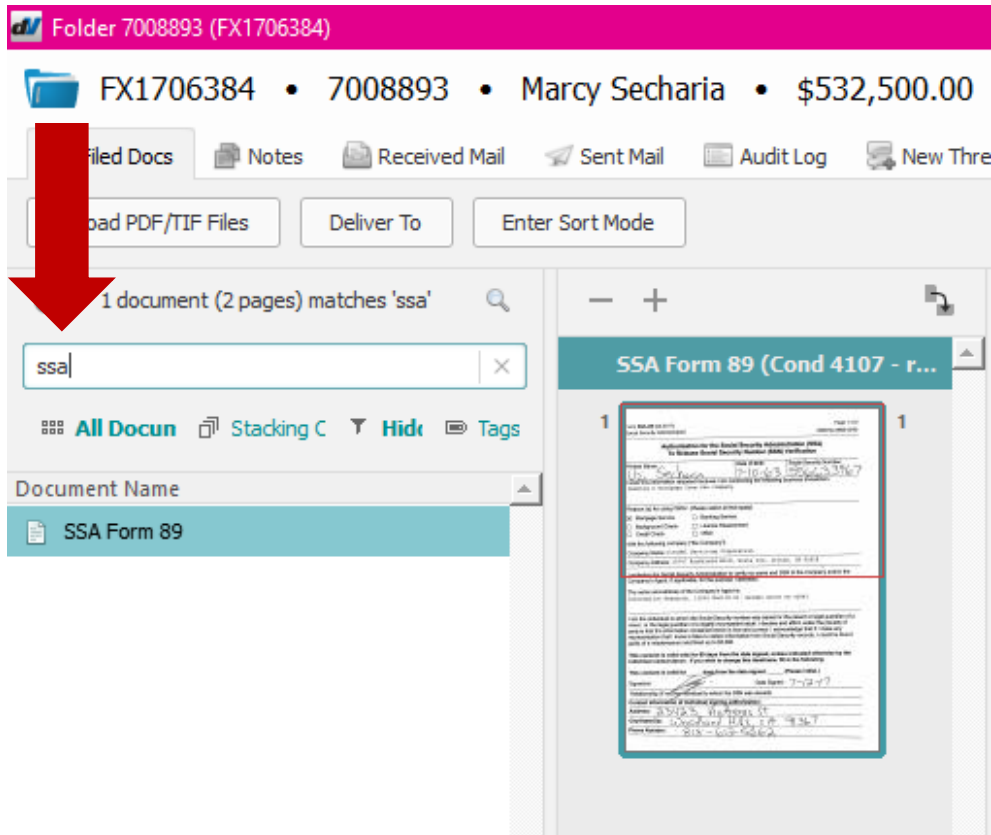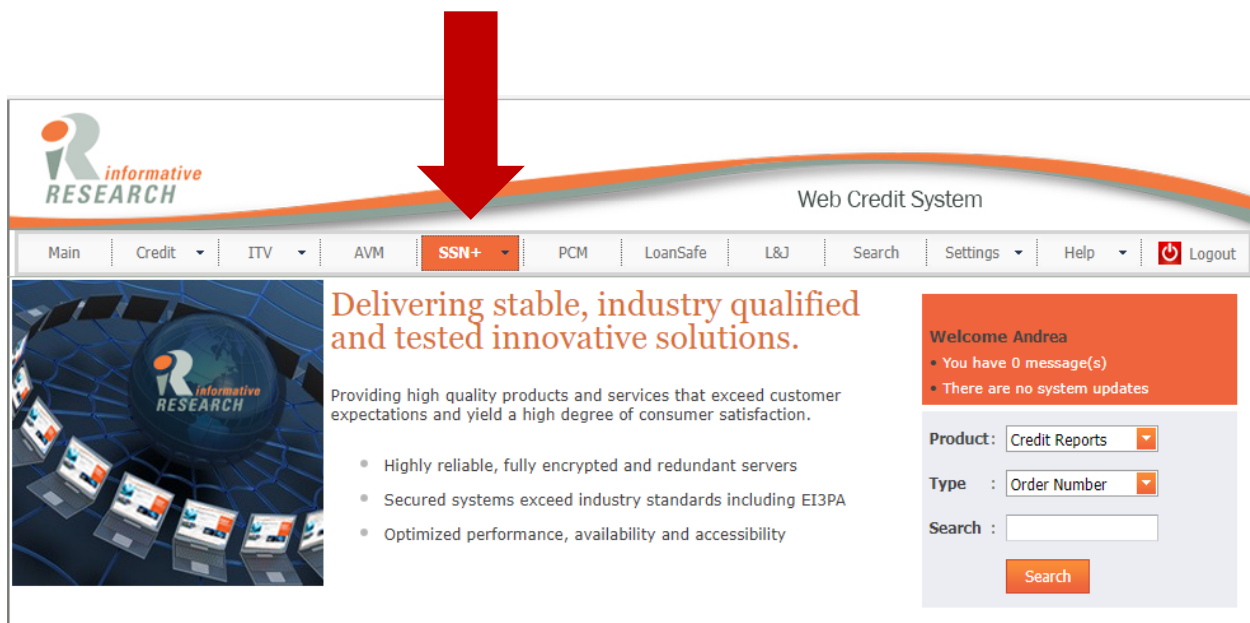
Search "SSA" to pull up the form. Make sure the form is fully completed.

<mark>NOTE: MUST UPLOAD PAGE 1 AND PAGE 2 (even though Page 2 is informational only). INFORMATIVE RESEACRH WILL NOT ACCEPT ONLY 1 PAGE.</mark>

Right click on the highlighted verbiage "SSA FORM 89" to save to your desktop.

Using Google Chrome, log into the Informative Research website.

Click on the "SSN+" drop down and choose ORDER SSN+ REPORT.

Using the form in DV as a reference, fill out the information on the website appropriately, attach the form from your desktop and click ADD TO CART.

Your order will pop under SSN+ ORDER SUMMARY, check the little box & click ORDER.

Highlight and right click to copy the order submitted successfully status. You will need to paste this in the conversation log in Byte Pro.
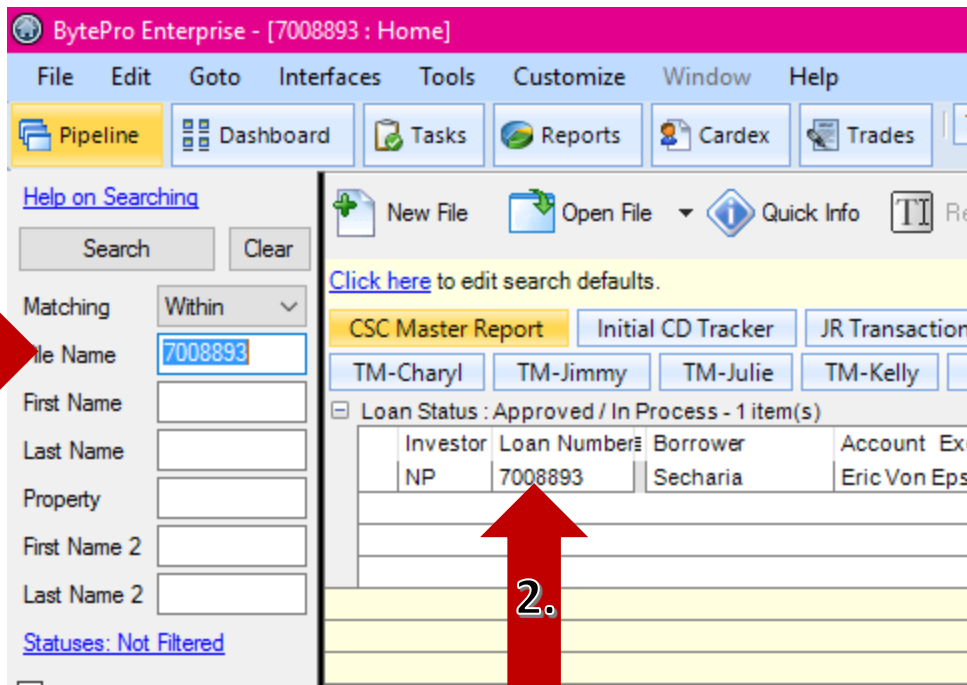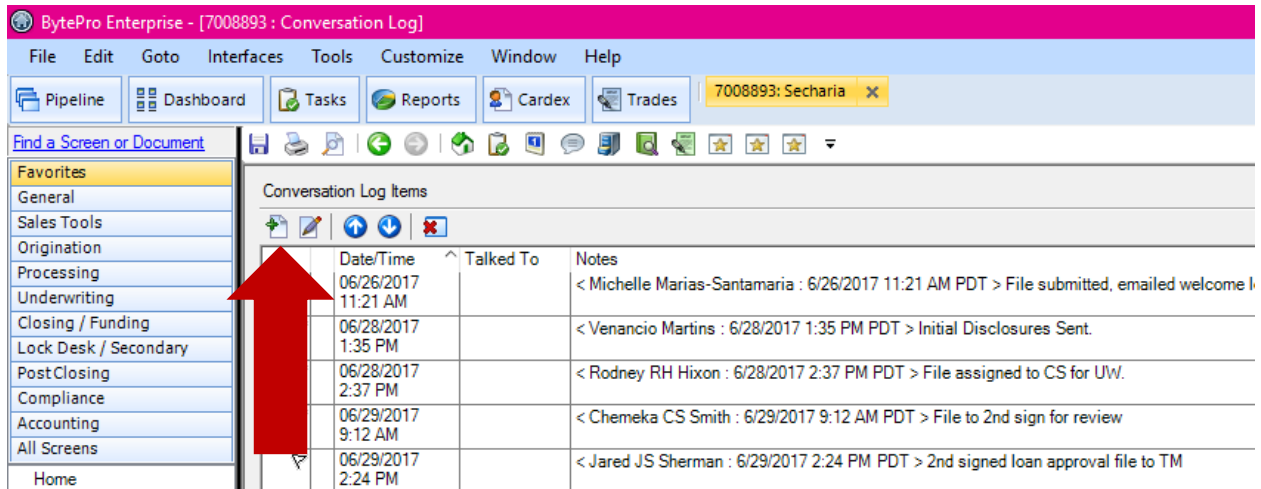
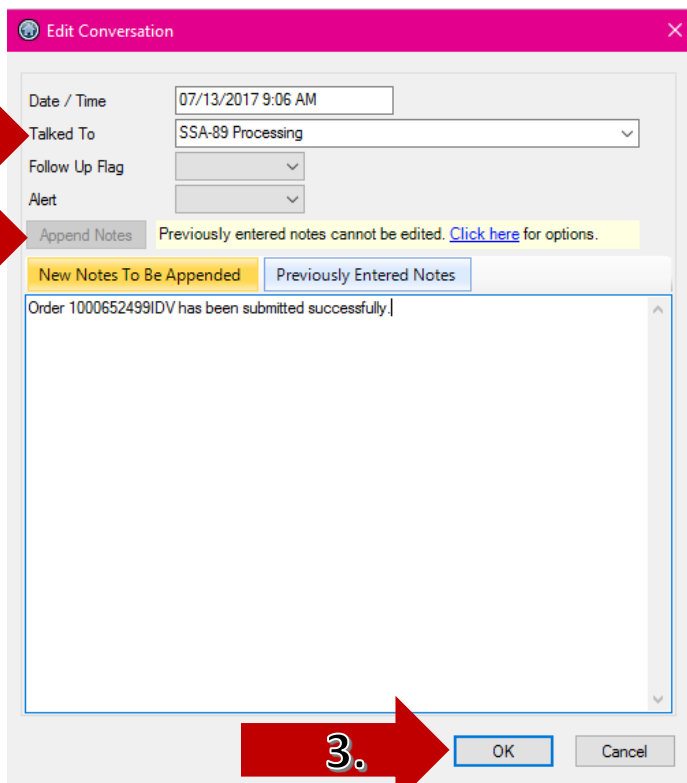From the home screen of Byte Pro, enter the loan number under FILE NAME and press enter.

Double click on the file to open it.
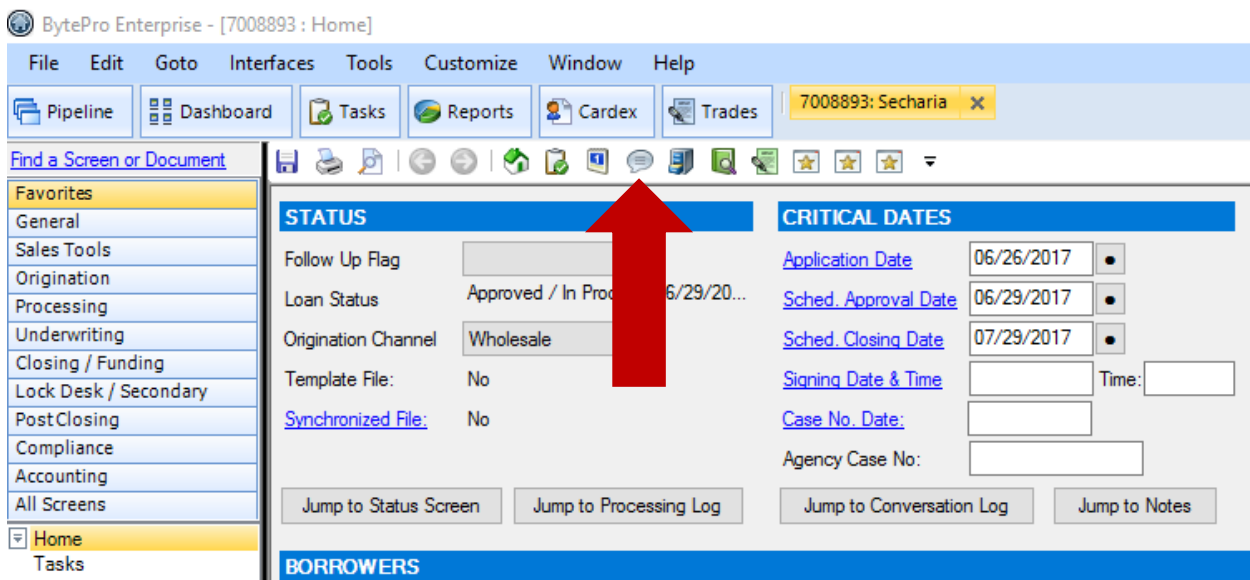
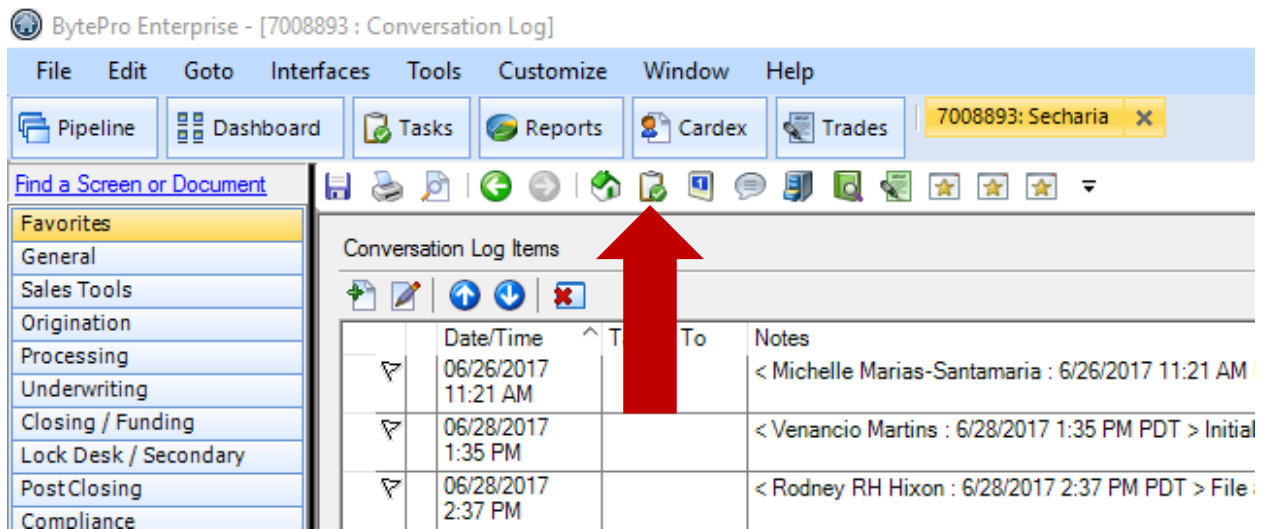Click on the "Thought Cloud" sub-icon to go to the conversation log.

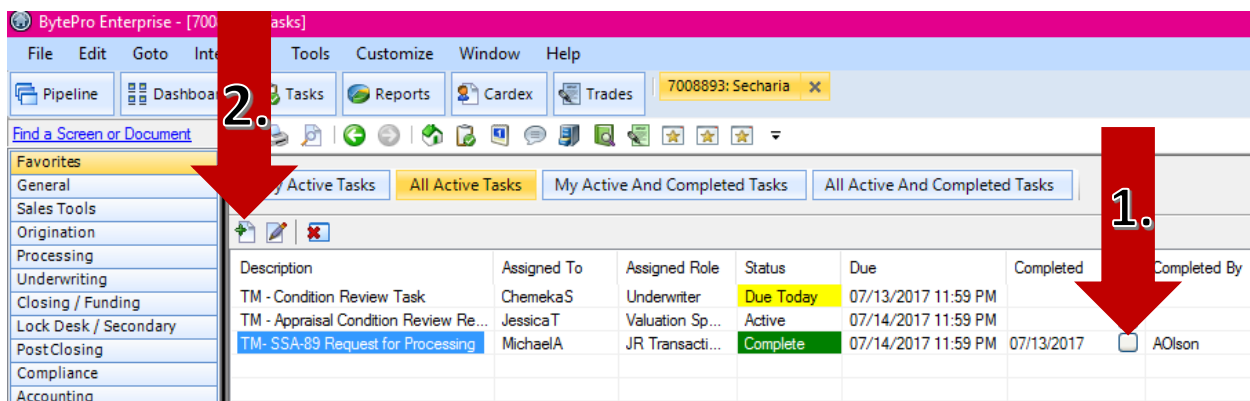Click on the "Green + and Paper" sub-icon to leave a no

Talked To (aka Header): SSA-89 Processing

Click on APPEND NOTES and paste the order submitted successfully status message.
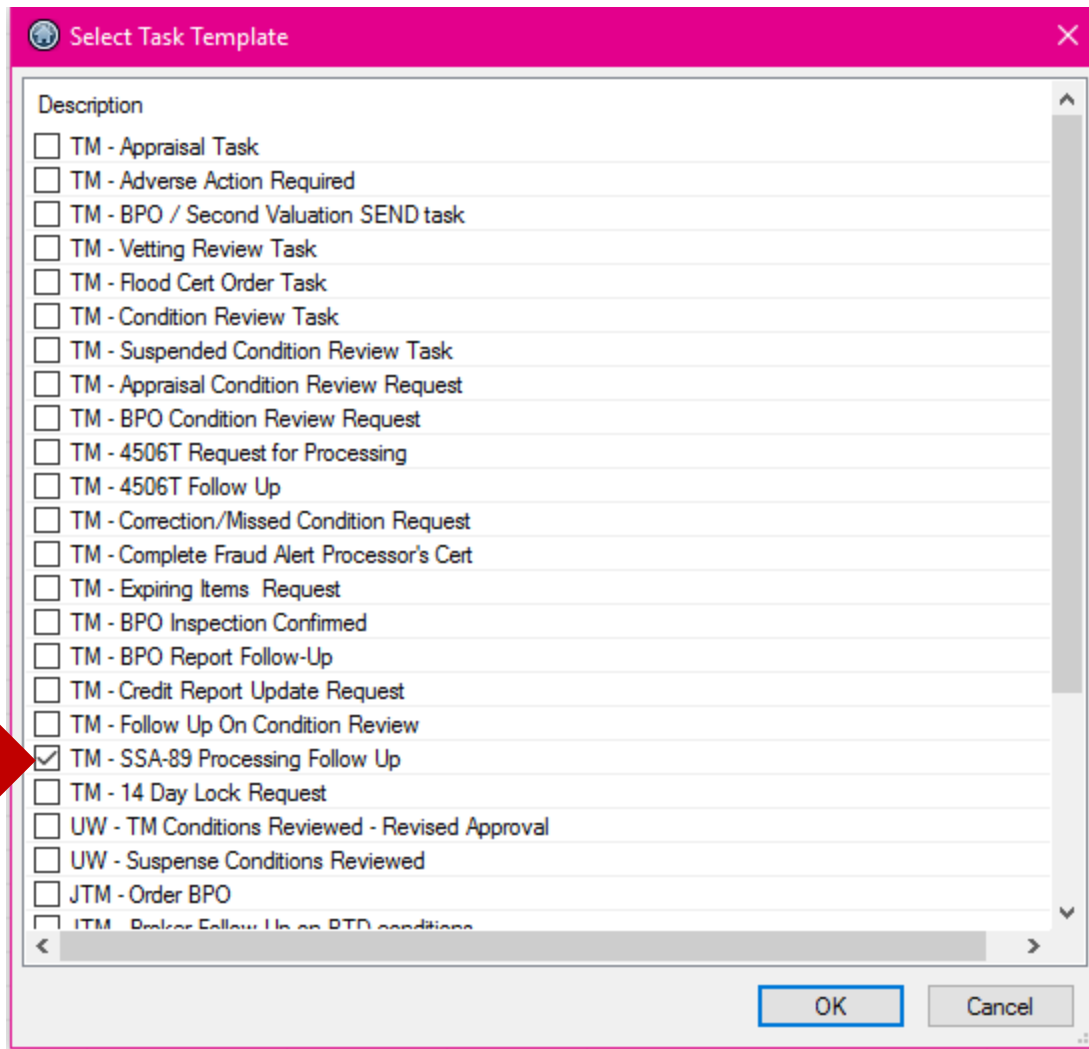
Click OK.

Click on the "Clipboard and Green Checkmark" sub-icon to go to the tasks screen.

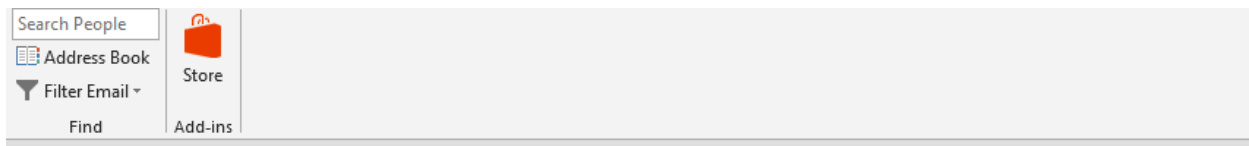Click on the little box and MARK AS COMPLETE.

After you have completed the task, click on the "Green + and Paper" sub-icon and choose CREATE ONE OR MORE TASKS FROM A TEMPLATE.

The SELECT TASK TEMPLATE window will pop up. Choose TM – SSA-89 PROCESSING FOLLOW UP.

Click OK.

Wait for email from Informative Research

Note: Check your Junk Email box.

Thu 7/13/2017 9:12 AM

no-reply@informativeresearch.com

Order Accepted : Secharia, Uzi1000652499IDV

To   Andrea Olson

ⓘ Links and other functionality have been disabled in this message. To turn on that functionality, move this message to the Inbox.
This message was marked as spam using a junk filter other than the Outlook Junk E-mail filter.
We removed extra line breaks from this message.
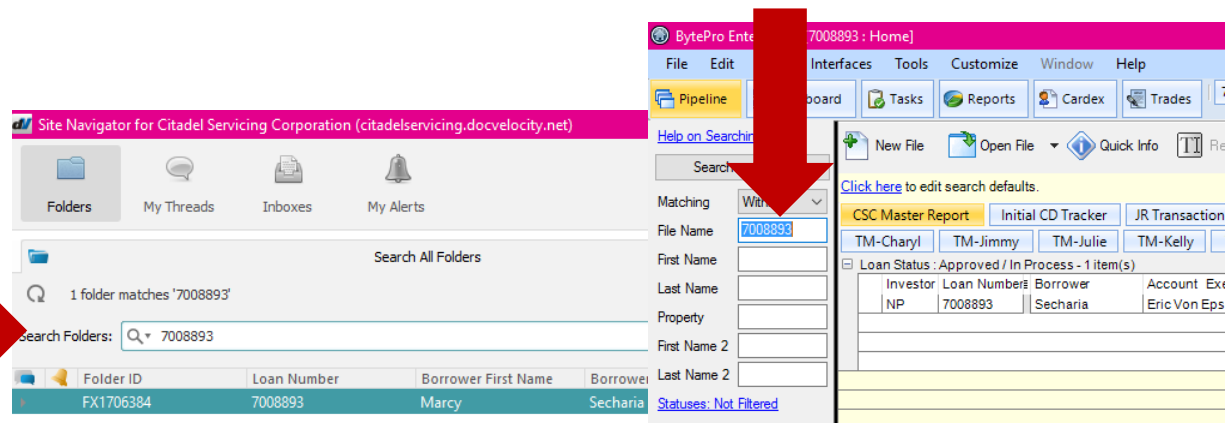We converted this message into plain text format.

Andrea Olson,

SSN Plus Order Number 1000652499IDV has been accepted by the Informative Research SSN Plus system. To view your order click here:

https://order.informativeresearch.com/WCS/IDV/IDVOrderList.aspx
<https://order.informativeresearch.com/WCS/IDV/IDVOrderList.aspx?FromBOPS=1000652499IDV&ClientID=2005626>
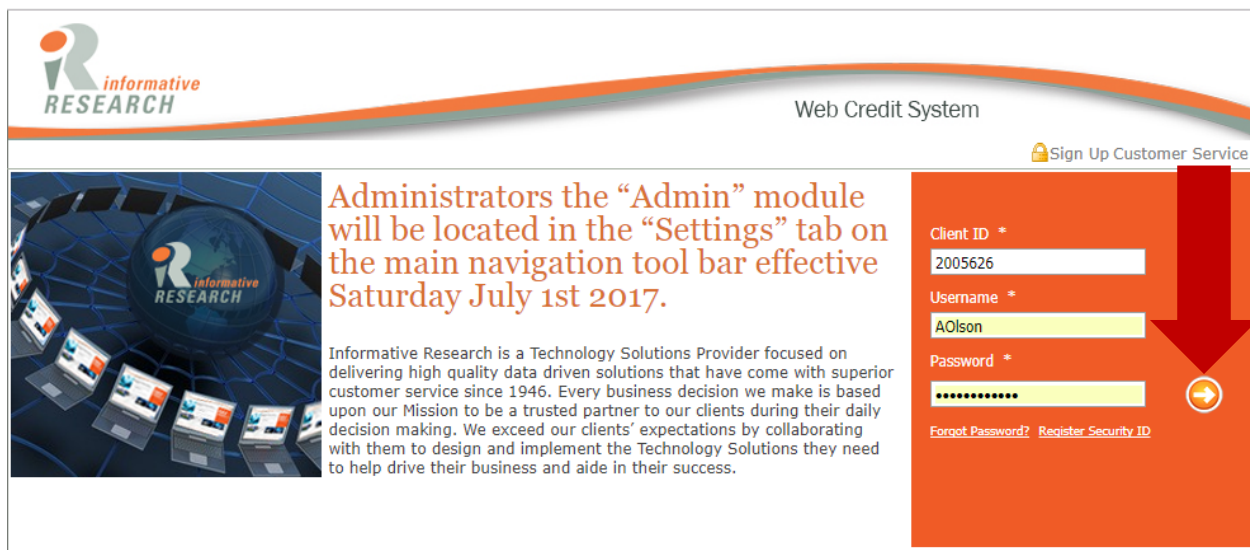
- IR Order Center

Here is an example of what the email will look like. Open the file in Doc Velocity & Byte Pro.

Once you have entered the loan number click ENTER.

Double click to open the file in each system.

Using Google Chrome, log into the Informative Research website.

Click on SSN+ dropdown and choose SSN+ REPORT LIST.

Once the request is complete the ORDER NUMBER will show blue in color. Click on the ORDER NUMBER to open the report.

When the report pulls up, right click and select print.

Make sure your printer is set to UPLOAD TO DOC VELOCITY.
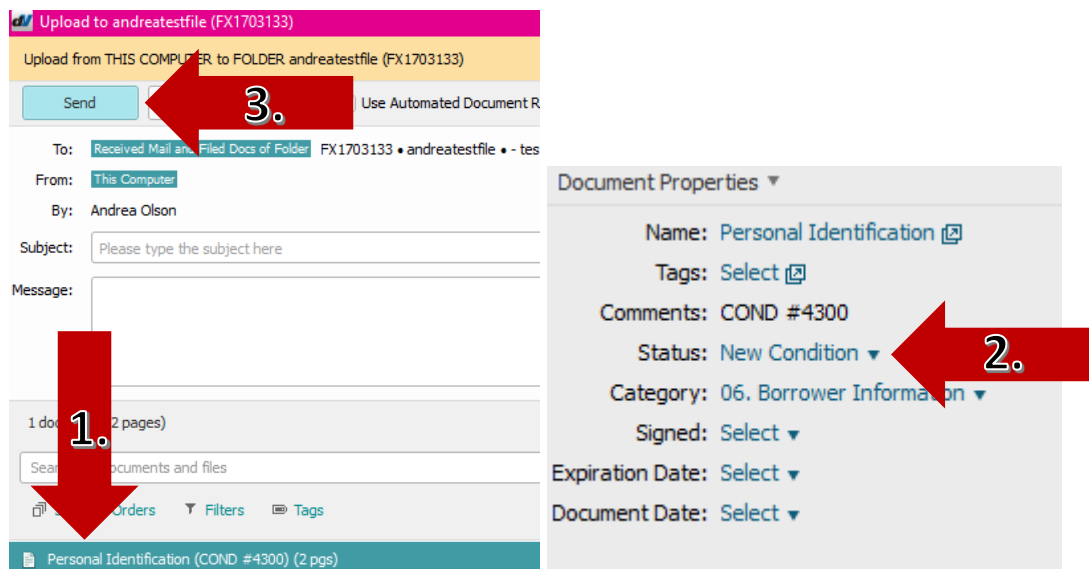
Click PRINT.
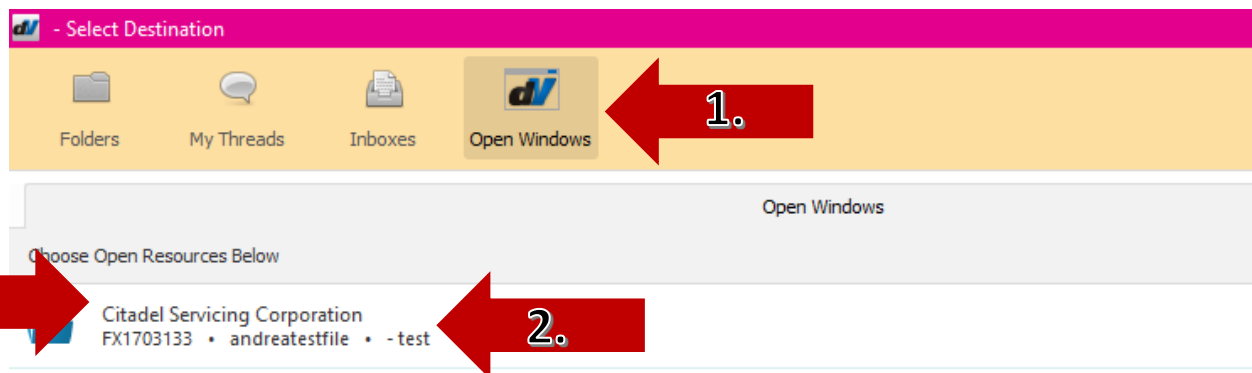
Your "upload" window will pop for DOC VELOCITY.

<mark>NOTE: The bright orange color is how you know you are uploading.</mark>

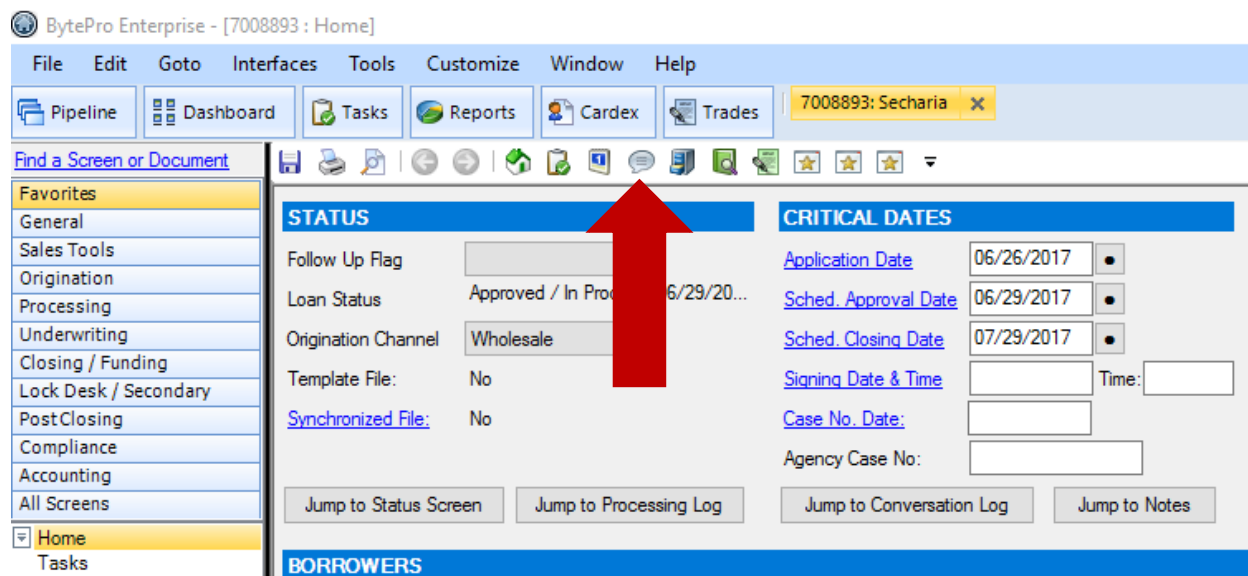Since we opened the file in BOTH DV & BYTE PRO you can select OPEN WINDOWS & double click on the file.

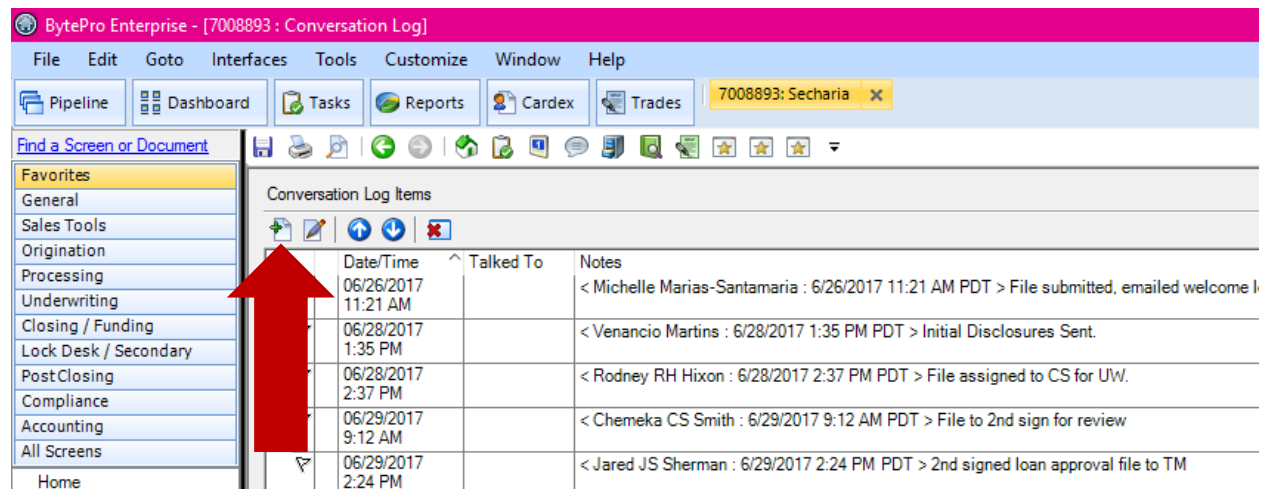On the left hand side click on the document to highlight it and press spacebar.

Title: PERSONAL IDENTIFICATION

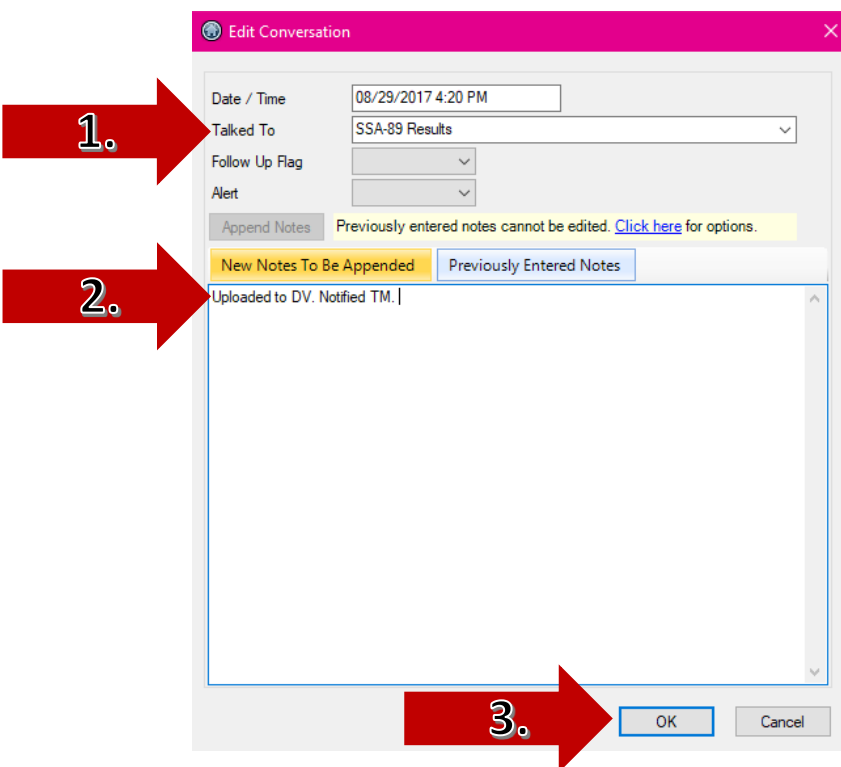**Comment**: COND #4300

<mark>**CHANGE STATUS TO NEW CONDITION and click SEND.**</mark>

From Byte, click on the "Thought Cloud" sub-icon to leave a comment in the conversation log.
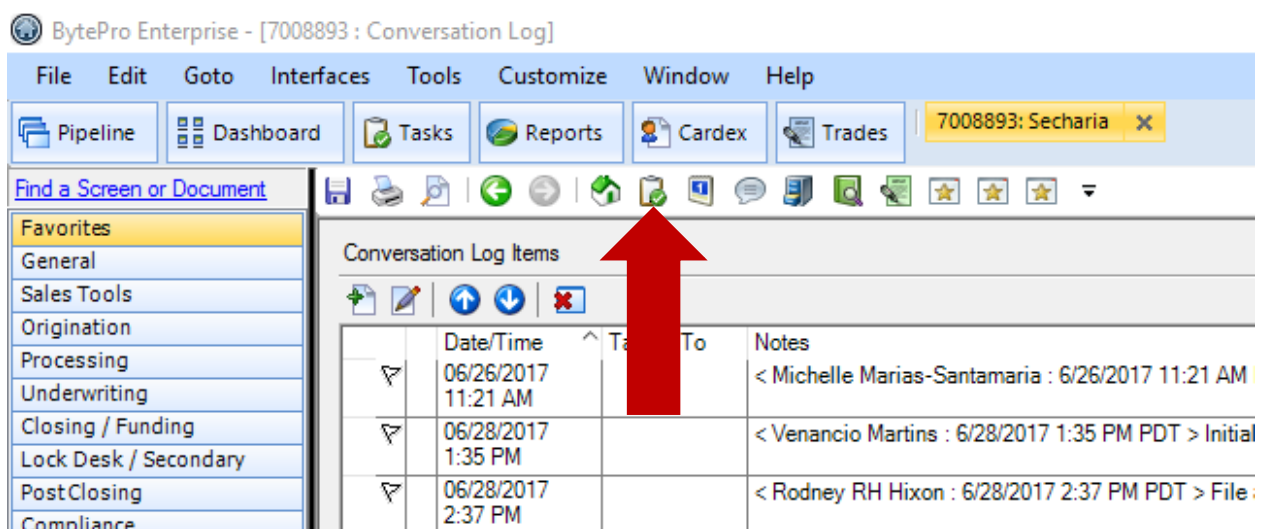

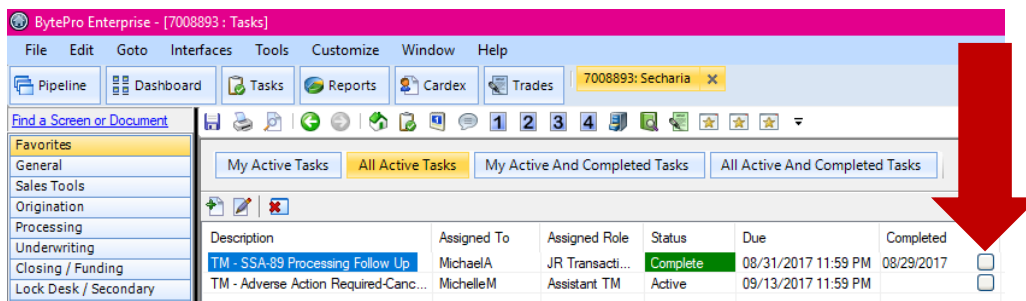Click on the "Green + and paper" sub-icon to add a note.

Talked To (aka Header): SSA-89 Results

Append Notes: Uploaded to DV. Notified TM.

Click OK.

After leaving your comment, click on the "Green checkmark and Clipoboard" sub-icon to clear the task.

Click on the box under completed and select MARK AS COMPLETE.

Forward the email you received from Informative Research.

TO: TM

CC: TRUDY

BODY OF EMAIL: Uploaded to DV. Updated conversation log.

SEND