

Loan Officer - "Ready for Processing" Request

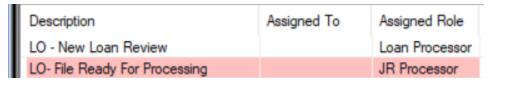
Business Solutions has added fields to the "Retail Lead Processing Checklist" screen.

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:



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

| P | | 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.

