



Disposition of Prequalification Requests – Reference Guide

Purpose:

When a file is moved to Inactive Retail Lead status and a Credit Report has been pulled by CSC a “Disposition of Prequalification Request” form will be issued to the borrower.

Loan Status:

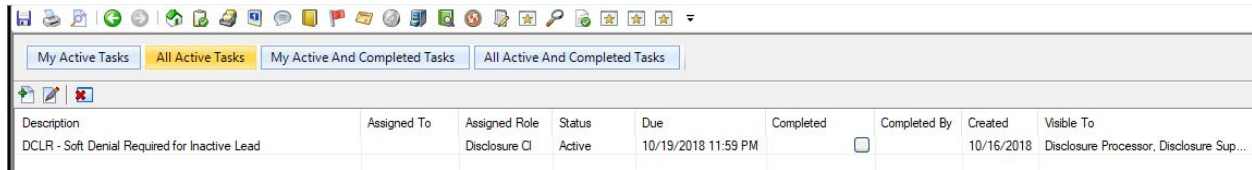
Loan Status will be Inactive Retail Lead

Current Loan Status	
<input type="radio"/> Submitted	
<input type="radio"/> Incomplete Retail Submission	
<input type="radio"/> Suspended	
<input type="radio"/> Approved / In Process	
<input type="radio"/> Ready for Docs	
<input type="radio"/> Lenders Out-WET/DRY	
<input type="radio"/> Docs Out-WET	
<input type="radio"/> Docs Out-DRY	
<input type="radio"/> Docs Back-DRY	
<input type="radio"/> Funded	
<input type="radio"/> Docs Back-WET	
<input type="radio"/> Closed	
<input type="radio"/> Declined	
<input type="radio"/> Canceled	
<input type="radio"/> Withdrawn	
<input type="radio"/> Correspondent - Submitted - Flow	
<input type="radio"/> Correspondent - Submitted - Bulk	
<input type="radio"/> Correspondent - Approved / In Pro...	
<input type="radio"/> Correspondent - CL Sub-Eligible	
<input type="radio"/> Correspondent - Eligible Bulk	
<input type="radio"/> Correspondent - Clear To Close	
<input type="radio"/> Correspondent - Clear to Purchase	
<input type="radio"/> Correspondent - Purchased	
<input type="radio"/> Correspondent - Commitment Docs	
<input type="radio"/> Correspondent - Canceled	
<input type="radio"/> Correspondent - Denied	
<input type="radio"/> Correspondent - Withdrawn	
<input checked="" type="radio"/> Inactive Retail Lead	10/16/2018
<input type="radio"/> Test File	

Credit Scores will be populated with the “Date Scores Created” field completed in Byte on the Credit Score Disclosure screen.

Date Scores Created	09/13/2018 8:54 AM	•
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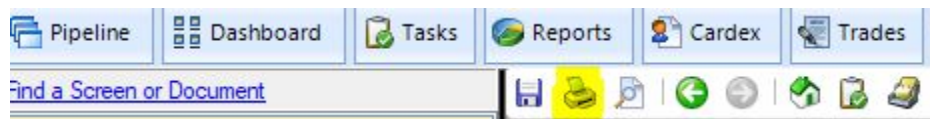
The “DCLR – Soft Denial Required for Inactive Lead” task will be auto-generated in Byte and assigned to the Disclosure Clerk.



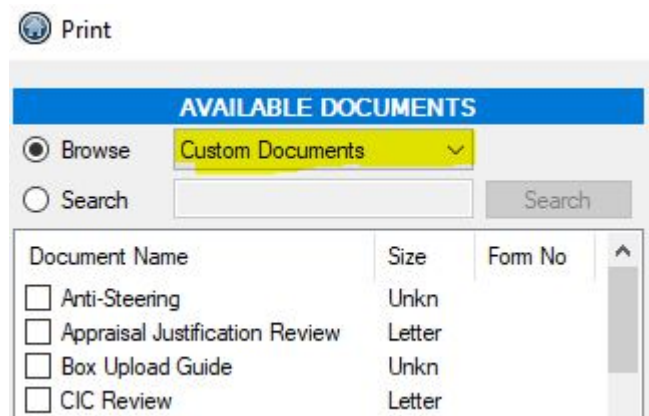
Description	Assigned To	Assigned Role	Status	Due	Completed	Completed By	Created	Visible To
DCLR - Soft Denial Required for Inactive Lead		Disclosure Cl	Active	10/19/2018 11:59 PM	<input type="checkbox"/>		10/16/2018	Disclosure Processor, Disclosure Sup...

Process:

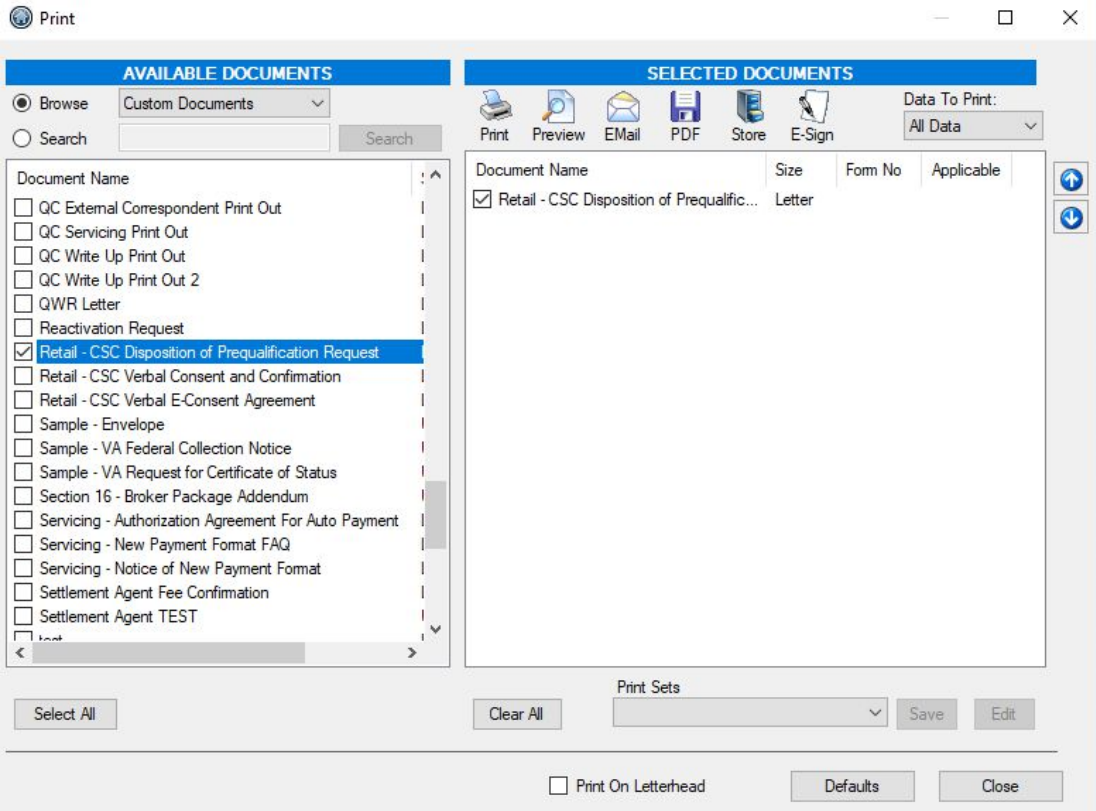
1. To generate the required document, enter the print menu in Byte by clicking the printer icon from any screen.



2. In the print menu, select “Custom Documents” from the Browse dropdown



3. From the list of documents – Check the box next to “Retail – CSC Disposition of Prequalification Request” which will cause the form to populate with a checked box on the right side of the menu titled “Selected Documents”



AVAILABLE DOCUMENTS

☒ Browse Custom Documents ☐ Search Search

Document Name
<input type="checkbox"/> QC External Correspondent Print Out
<input type="checkbox"/> QC Servicing Print Out
<input type="checkbox"/> QC Write Up Print Out
<input type="checkbox"/> QC Write Up Print Out 2
<input type="checkbox"/> QWR Letter
<input type="checkbox"/> Reactivation Request
<input checked="" type="checkbox"/> Retail - CSC Disposition of Prequalification Request
<input type="checkbox"/> Retail - CSC Verbal Consent and Confirmation
<input type="checkbox"/> Retail - CSC Verbal E-Consent Agreement
<input type="checkbox"/> Sample - Envelope
<input type="checkbox"/> Sample - VA Federal Collection Notice
<input type="checkbox"/> Sample - VA Request for Certificate of Status
<input type="checkbox"/> Section 16 - Broker Package Addendum
<input type="checkbox"/> Servicing - Authorization Agreement For Auto Payment
<input type="checkbox"/> Servicing - New Payment Format FAQ
<input type="checkbox"/> Servicing - Notice of New Payment Format
<input type="checkbox"/> Settlement Agent Fee Confirmation
<input type="checkbox"/> Settlement Agent TEST

SELECTED DOCUMENTS

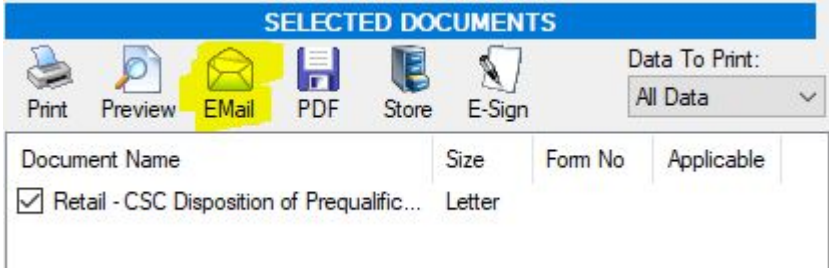
Print Preview EMail PDF Store E-Sign Data To Print: All Data

Document Name	Size	Form No	Applicable
<input checked="" type="checkbox"/> Retail - CSC Disposition of Prequalific...	Letter		

Select All Clear All Print Sets Save Edit

☐ Print On Letterhead Defaults Close

4. If an E-consent has been provided by the applicant the “Disposition of Prequalification Request” may be emailed to the borrower by clicking the “Email Icon”.

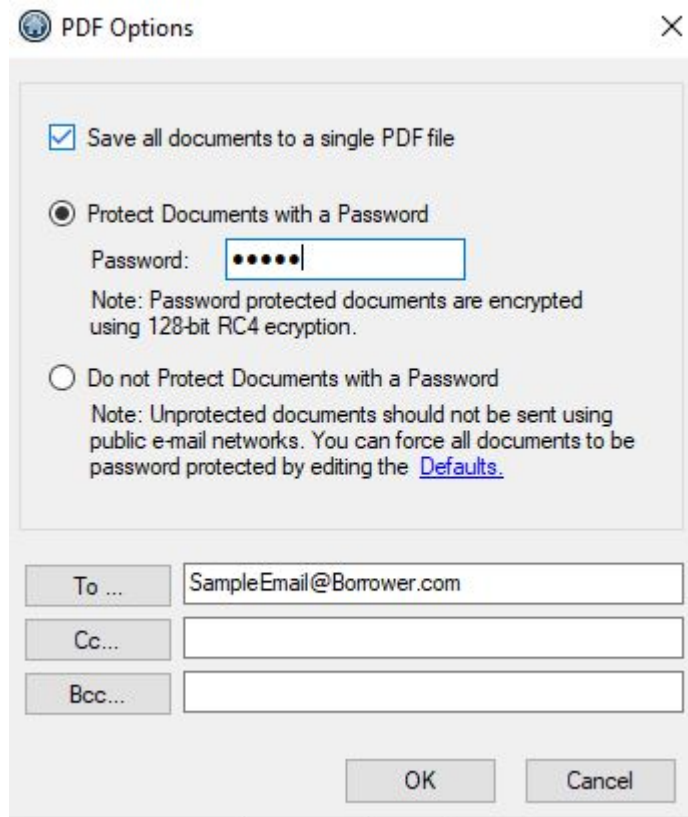


SELECTED DOCUMENTS

Print Preview **EMail** PDF Store E-Sign Data To Print: All Data

Document Name	Size	Form No	Applicable
<input checked="" type="checkbox"/> Retail - CSC Disposition of Prequalific...	Letter		

5. Enter the borrower's contact information and a password before issuing the email to the borrower.



PDF Options

☒ Save all documents to a single PDF file

☒ Protect Documents with a Password

Password:

Note: Password protected documents are encrypted using 128-bit RC4 encryption.

☐ Do not Protect Documents with a Password

Note: Unprotected documents should not be sent using public e-mail networks. You can force all documents to be password protected by editing the [Defaults](#).

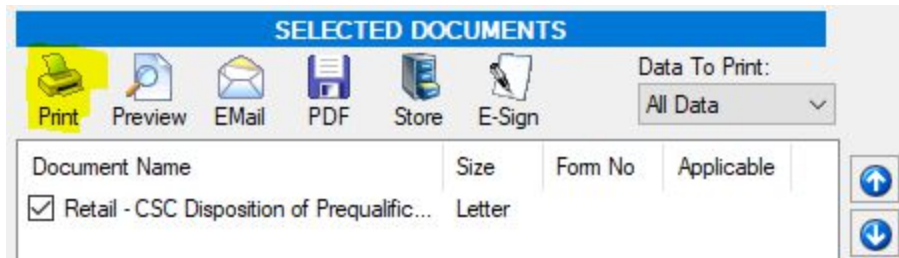
To ...

Cc...

Bcc...

OK Cancel

6. If a signed E-consent has not been provided by the applicant the notice will need to be printed and mailed to the applicant.



SELECTED DOCUMENTS

Print Preview EMail PDF Store E-Sign

Data To Print: All Data

Document Name	Size	Form No	Applicable
<input checked="" type="checkbox"/> Retail - CSC Disposition of Prequalific...	Letter		

Up Down

7. Create a note in the conversation log

8. Upload proof of delivery to the Stored Documents in BytePro using the “New” and selecting “Import New Documents from Disk”. (User can drag and drop documents into the document list as well if desired instead of using the “New” button

Status	Category	Type	Description	Expires	Date/Time Created	Format	Source
Not Reviewed			Z Documents		4/30/2018 8:01:09 AM	PDF	Interface
Not Reviewed			G Documents		4/30/2018 8:02:34 AM	PDF	Interface
Not Reviewed			G Documents_2		4/30/2018 8:09:41 AM	PDF	Interface
Not Reviewed			G Documents_3		4/30/2018 8:13:06 AM	PDF	Interface
Not Reviewed			G Documents_4		4/30/2018 8:18:36 AM	PDF	Interface
Not Reviewed			G Documents_5		4/30/2018 8:20:01 AM	PDF	Interface
Not Reviewed			Z Documents_2		4/30/2018 8:21:38 AM	PDF	Interface
Not Reviewed			G Documents_6		4/30/2018 8:27:21 AM	PDF	Interface
Not Reviewed			G Documents_7		4/30/2018 8:31:05 AM	PDF	Interface
Not Reviewed			Z Documents_3		4/30/2018 8:32:54 AM	PDF	Interface
Not Reviewed			G Documents_8		4/30/2018 1:13:37 PM	PDF	Interface
Not Reviewed			G Documents_9		4/30/2018 1:15:20 PM	PDF	Interface
Not Reviewed			G Documents_10		4/30/2018 1:17:44 PM	PDF	Interface
Not Reviewed			G Documents_11		4/30/2018 1:19:25 PM	PDF	Interface
Not Reviewed			G Documents_12		4/30/2018 1:21:35 PM	PDF	Interface
Not Reviewed			G Documents_13		4/30/2018 1:23:37 PM	PDF	Interface
Not Reviewed			G Documents_14		4/30/2018 1:26:14 PM	PDF	Interface
Not Reviewed			G Documents_15		4/30/2018 1:28:56 PM	PDF	Interface

9. On the “Statement of Credit Denial” Screen enter the date the Disposition of Prequalification Request form was sent.

10. Mark the “DCLR – Soft Denial Required for Inactive Lead” task as completed by clicking the checkbox in the “Completed” column on the Tasks screen.

<div> <div>My Active Tasks</div> <div>All Active Tasks</div> <div>My Active And Completed Tasks</div> <div>All Active And Completed Tasks</div> </div>					
<div> <div></div> <div></div> <div></div> </div>					
Description	Assigned To	Assigned Role	Status	Due	Completed
DCLR - Soft Denial Required for Inactive Lead		Disclosure Cl	Overdue	10/19/2018 11:59 PM	<input type="checkbox"/>

Contact the Compliance Department with any questions.