Transaction Manager 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			
Set up all email templates			
Closing Process Overview – Internal Work Flow			
Byte Pro Color Code and Status Descriptions			
Vetting Training			
How to correctly process CSC ITP in Byte Pro, DV and communication to Broker/AE			
Recommended Email folder set up to effectively manage emails			
File escalations			
Review Appraisals Cleared Report #4400 and review for vetting; set task if needed			
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 convo 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.			
Revised approvals/UW Revisit Condition Valuation Review Process			
Re-disclosure FAQ's			
Sending Revised Loan Approvals			
How to complete the CD/Initial Doc Prep Checklist			
How to complete TM CD Doc Prep Screen in Byte Pro			
Cond #4105 – TRID Calendars/Expiration Date Calendar			
Overview of CSC closing process (including but not limited to email templates, etc)			
Use test files to: - Request Initial CD/Initial Doc Prep			
- Final Doc Prep			
- Move file Ready For Docs			

Transaction Manager Training Checklist

Name _____   Hire Date _____

Position _____   Manager _____

Facilitator(s)_____

Task Reviewed	Date Completed	Trainee Initials	Facilitator Initials
Processes Continued:			
LPC vs BPC			
TRID vs Non TRID			
TRID Training			
CIM #29			
QC Escalation Process			
Escrow Holdback			
Subject Property Address FAQ's			
Hazard Insurance Review			
Condo Master Insurance Review			
Insurance Exceptions and Escalation Process			
Set up BytePro Shortcuts			
Set up DV Preferences and Login Defaults			
How to Cancel a file out of BytePro			
Status Screen—Ready for Docs or Cancelled			
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 Tasks:			
When loan approval comes out			
When updated loan approval comes out			