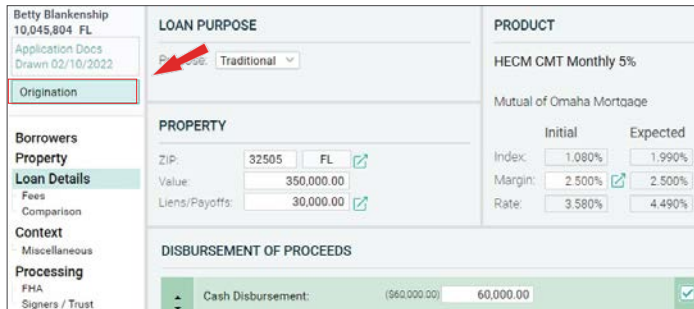


Submitting an Application to the Lender

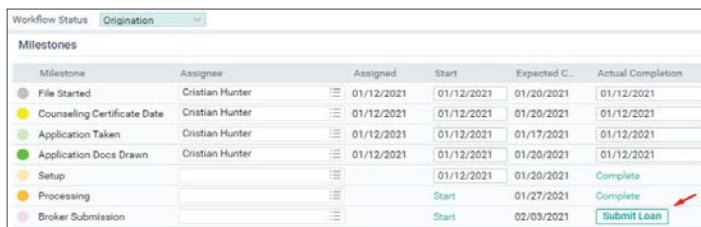
PLEASE NOTE: YOU MUST SUBMIT COUNSELING CERTIFICATE WITH APPLICATION

1. Click the “Status Bar” to open the Milestones.



The screenshot shows a loan application interface for Betty Blankenship. The 'Status Bar' is highlighted with a red box and a red arrow. The 'Milestones' section is also visible, showing a table of tasks and their completion status.

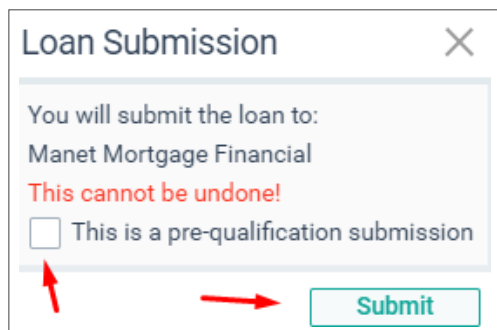
2. Once the user’s portion of the milestones is completed, click the “Submit Loan” button.



The screenshot shows the 'Milestones' table with columns for Milestone, Assignee, Assigned, Start, Expected C., and Actual Completion. The 'Submit Loan' button is highlighted with a red arrow.

Milestone	Assignee	Assigned	Start	Expected C.	Actual Completion
File Started	Cristian Hunter	01/12/2021	01/12/2021	01/20/2021	01/12/2021
Counseling Certificate Date	Cristian Hunter	01/12/2021	01/12/2021	01/20/2021	01/12/2021
Application Taken	Cristian Hunter	01/12/2021	01/12/2021	01/17/2021	01/12/2021
Application Docs Drawn	Cristian Hunter	01/12/2021	01/12/2021	01/20/2021	01/12/2021
Setup			01/12/2021	01/20/2021	Complete
Processing			Start	01/27/2021	Complete
Broker Submission			Start	02/03/2021	Submit Loan

3. A confirmation box will display. Click “Submit” to send the loan to the lender. Once this set is completed, the broker will lose access to some features on the loan.



The screenshot shows a 'Loan Submission' confirmation box with the following text: 'You will submit the loan to: Manet Mortgage Financial. This cannot be undone!'. There is a checkbox for 'This is a pre-qualification submission' and a 'Submit' button. Red arrows point to the checkbox and the 'Submit' button.

4. If the “Pre-Qualification” button is selected, it will check the box in the Underwriter screen.










The screenshot shows the 'Underwriter' screen with a 'Submitted as Pre-Qualification' checkbox checked. A red arrow points to the checkbox.

Note — When the broker submits the loan to the lender, the broker loses access to some features on the loan. Completing the Milestones is optional and will change the status of the loan card. Milestones are a tool to help manage tasks and organize activity for the loan process and do not push loans to stages.

Submitting an Application to the Lender

Note:

- The signature verification in the tracker will only display 60% completed regardless of the actual completion progress.
- Open and view the scanned documents to ensure the signature is present before you submit to the lender.
- The missing signature 60% warning doesn't hinder anything, just move forward with the loan

Documents			
Application	Step	Progress	Actions
Broker Participation Disclosure	MissingSignatu...	 60%	View Printed View Scanned
Finance Lender Disclosure	MissingSignatu...	 60%	View Printed View Scanned
Impound Account Statement	MissingSignatu...	 60%	View Printed View Scanned
Cooling-Off Period Disclosure	MissingSignatu...	 60%	View Printed View Scanned
Reverse Mortgage Interest Disclosure	MissingSignatu...	 60%	View Printed View Scanned
Domestic Partnership Disclosure	MissingSignatu...	 60%	View Printed View Scanned
Face to Face Counseling Form	MissingSignatu...	 60%	View Printed View Scanned