REVERSE VISION: LOAN SUBMISSION

This job aid provides step-by-step instructions to ensure all fields are completed accurately in order to submit a loan through our Wholesale Channel to Mutual of Omaha Mortgage.

1. Complete the Borrower Screen

All fields must be completed in the Borrower Screen.
* *Add co-borrower information as needed.*

2. Alternate Contact

Within the borrower screen, select "Add Relationships" to add an alternative contact .

3. Non-Borrowing Spouse

Select anywhere in the "white" area of the borrower screen to add a non-borrowing spouse or household member .

4. Complete the Property Screen

Complete all field s in the Property Screen.

* *Make sure to fill out the month and year built as well as the property charge section.*
The loan will not be able to be submitted to Underwriting without these sections being filled .

5. FA Screens

In the Processing Input screen, complete the Living Area field.

6. FA Screens

In the Data Collection screen, input the Family Size for the subject property household.

This includes adult children if they are reported on the borrower 's taxes.

7. FA Screens

If possible, run or reissue credit in the Borrower's Credit screen. If not possible, add the individual accounts in the Credit Accounts screen.

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8. Upload Application Package and Documents

After changing the loan status to Origination, add the supporting documents in the Notes section of RV.

The application package and appraisal will be added when the "submit loan" icon is selected.

The loan cannot be submitted to underwriting without these documents and they must be separate from the application and appraisal.

9. Submit Loan

Select the Submit Loan con to submit the completed loan package to Mutual of Omaha Mortgage.

If the application and appraisal have NOT been attached to the notes section, attach them here.

After attaching, the "submit loan" icon will change to black lettering.

Click on "submit loan" to complete the process.
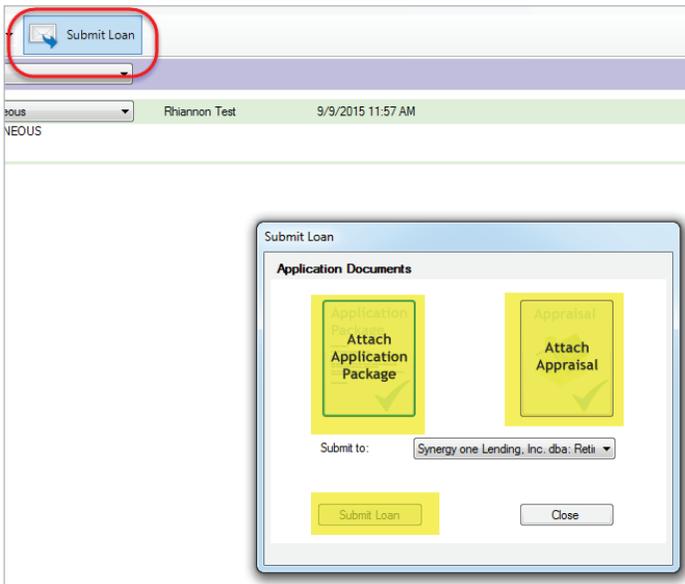
10. Submit Loan

The loan will submit to Mutual of Omaha Mortgage and an email will be sent to the Intake department.

The status of the loan will automatically change to "processing setup".