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 .

Date	of Birth:	12/15/1942		s F					
				1					
SSN		123-45-6879							
Loan Prope	Add Relat Informatio rty ZIP:	n 92101	Add (Col					
Relationship	with MARY S	MITH							
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3. Non-Borrowing Spouse

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

8	Add CoBorrower
&	Add Non-Borrowing Spouse
&	Add Other Household Member
	DisJoin Address of MARY SMITH
6	DisJoin Communication of MARY SMITH
肻	MARY SMITH passed away
W	Create Word Document

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 .





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5. FA Screens

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

Loan 🛛 🖓 🛛	Lender Information		Advanced Property Informati	on	
MARY SMITH	HUD Lender Number:	31215-0000-3	Property Appraised Value:	0.00	(as adjust
A MARY	Identification		Property Value Estimate:	250,000	
A Property	SimpleId :	2201544			
🌍 Loan	5110.0 #				
% Fees	FHA Case #:		APN Number:		
Comparison	FHA Case # Date:		Bed Rooms:	0	
Notes	Lender Loan #: Got				
Processing			Living Area:	1500	Sq. H.
Je Repairs	Broker Loan #:		Remaining Economic Life:	0	Years
Payoffs	Alternate Lender Loan #:		Flood Zone Code:		
Processing Input	CDM Lang #		Tibba Zone Code.		
Processing Tasks	CRIVI LOan #.		Flood Insurance Required:	?	
Appraisal Services	Settlement Agent Case #:		Property has a Well:	N	
🗇 Signatures	CounselingDocs.Org:	SHN752	Sentic Tank:	N	
Financial Assessment		()			
Data Collection	Credit Report		Direct Deposit Information fo	r Borrower	
Borrowers' Credit	Credit Expiration:		Servicing Payment Type:	NA	
Credit Accounts			Dards Manage		
Accet Discinction			Bank Name:		
Evpenser			Bank Routing Number:		
Property Charges			Bank Account Number:		
Cash Flow					
Assessment Result			Bank Account Type:	NA	
Underwriting			Scheduled Closing		
Conditions					-
Appraisal Apalysis			Scheduled Closing Date:		

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.

If not possible, add the individual accounts in the Credit Accounts screen.

n Ŧ×	Credit Order Report	Credit Report	
ARY SMITH ^	Service Provider: CoreLogic CREDCO -	Credit Ordered By:	
🚨 MARY	Report Type: Merge	Consumer Reporting Agency:	
A Property			
🜍 Loan	Order Credit	Credit Report Identifier:	
% Fees		Credit Report Attachments: Report Attachments:	
Comparison		67	
🤕 Notes	Add NBS Credit Information Add Other Household Cre	dit Information	
ocessing			
Je Repairs	Borrower Credit: MART SMITH (123-45-6879)		
🛃 Payoffs	Ørder Credit FICO S	icores: Experian 0 Equifax 0 TransUnion 0	Overall Credit Score: 0
🚊 Processing Input	New Inquiries Past 90 Days: 0	Part 12 Martha	
Processing Tasks	? Delinquent Federal Tax Debt? (Include	a Joint Accounts); 30 0 60 0 90 0	
Appraisal Services	Non-Traditional History Required	Det 24 Martin	
📝 Signatures	(Include	s Joint Accounts); 30 0 60 0 90 0	
ancial Assessment			
Data Collection	Bankruptcies	CAIVRS Screening	Other Names Found
🕞 Borrowers' Credit	Bankruptcy Exists	Authorization Code:	
Credit Accounts		0.11.1	
Income		Case Number:	
Asset Dissipation		EVA Insurance Chim Found	
Expenses			
R Property Charges		Delinquent Federal Non-Tax Debt Found	

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.

oan	+ Add New Note	View: All	▼
MARY SMITH MARY Property Case Loan Fees Notes Promotion		Miscellaneous	▼ Rhiannon Test



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.

Submit Loan		
venus venus	Rhiannon Test	9/9/2015 11:57 AM
		Submit Loan Application Documents Application Application Attach Application Package Submit to: Submit to: Submit to: Close

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".





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