



## Submitting a TBD Loan

Version 2.0 CS 11/27/2018

Click “Create” scroll to “Create a loan” (if you want to type in the 1003)

or

“Import a loan” if you are importing a fnma 3.2 file

Choose the Loan Officers name from the dropdown list

Check the Box next to **Preapproval**

Select Submit

5TH STREET  
CAPITAL

Create Pipeline Rates Reports Bulk Delivery Resources

Home

### New Loan Setup

In the text box below, enter a few sequential characters contained in any of the following: Institution ID, Institution Name, Originator First Name, or Originator Last Name. Then, select an item from the drop down menu, and click Submit.

Originator: 100 > ABC Community Bank > Cami Originator

Action: Create A Loan

PreApproval:

Submit Cancel

Fill out info in red (Name, Last name, SSN, Product)

Under property information, Make sure the box for "Pre Approval" is checked

Enter City, State, County, and Zip if it is available at the time of submission

The screenshot shows a web form titled "Property Information". At the top, there is a section "Same as Borrower's Present Address?" with radio buttons for "Yes" and "No". To the right of this section is a checkbox labeled "PreApproval" which is checked. A red rectangular box highlights the "PreApproval" checkbox, and a red arrow points from the right towards it. Below this is a "Subject Property Address" field. Further down, there are fields for "Address Number", "Address Street", and "Address Unit". Below these are dropdown menus for "City", "State", and "County", and input fields for "Zip" and "Zip Ext.". The "City", "State", and "County" dropdown menus are highlighted in yellow.






Under Loan Information enter the following:

- “Sales Price”
- “Appraised Value”
- “Product”
- “Base Loan Amount”

Select “Save/Close” when complete

Loan Information			
<b>Sales Price</b> \$1,000,000.00	<b>Estimated Balance on Home</b> \$0.00	<b>Property Type</b> [Dropdown]	
<b>Appraised Value</b> Same as Sales Price \$1,000,000.00	<b>Approx. Mtg Payment</b> \$0.00	<b>Property will be</b> [Dropdown]	<b>Purpose of Loan</b> [Dropdown]
<b>Base Loan Amount</b> \$500,000.00	<b>Is Employee Loan?</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Product</b> Non-Conforming 5/1 Libor Arm 5SCh [Dropdown]	
<b>Financed FHA MIP or VAFF</b> \$0.00	<b>LTV</b> 50.000%	<b>Lien Type</b> First Mortgage [Dropdown]	<b>Mortgage Applied For</b> Conventional [Dropdown]
<b>Total Loan Amount</b> \$500,000.00	<b>CLTV</b> 50.000%	<b>Number of Months</b> 360	<b>Rate</b> 5.500%
<b>Down Payment</b> 50.000% % \$500,000.00	<b>Subordinate Financing LIAB</b> \$0.00		
<b>Subordinate Financing DOT</b> \$0.00	<b>New First Mortgage Amount</b> \$0.00	<b>Closing Costs from 2nd Lien</b> \$0.00	<b>Application Date</b> [Text Box]

The loan Purpose will reflect “PreApproval”

Forms & Docs 	<b>Application Criteria</b> <span style="float: right;">Hide</span>		
Doc Packages	<b>Application Date:</b>		<b>Property Address</b>
Closing Docs	<b>Name</b> 		<b>Value of Property</b>
Services	<b>Monthly Income</b> 		<b>Loan Amount</b> 
Status & Tracking	<b>Social Security Number</b> 		
Actions	<b>Loan Details</b> <span style="float: right;">Hide</span>		
Imaging	<b>Final:</b> 10/7/2018	<b>Product Code:</b>	NCA51L H
	<b>Loan Amount:</b> \$500,000.00	<b>Rate:</b>	5.500%
	<b>Loan Purpose:</b> PreApproval	<b>APR:</b>	0.000%
	<b>Institution:</b> ABC Community Bank (100)	<b>P &amp; I:</b>	\$0.00

**\*Do not “Register” the loan it will trigger compliance alerts**

The 1003 must be completed except for Property Address before the loan is submitted to Underwriting

<b>I. TERMS</b>	<b>II. PROPERTY</b>	<b>III. BORROWER</b>	<b>IV. EMPLOYMENT</b>	<b>V. INCOME, HOUSING</b>	<b>VI. ASSETS</b>	<b>VI. REO</b>
<b>VI. LIABILITIES</b>	<b>VII. TRANSACTION DETAILS</b>	<b>VIII. DECLARATIONS</b>	<b>IX. SIGNATURE</b>	<b>X. GOVERNMENT MONITORING</b>	<b>OTHER DATA</b>	<b>GOVERNMENT</b>

Proceed to upload documents to the loan.

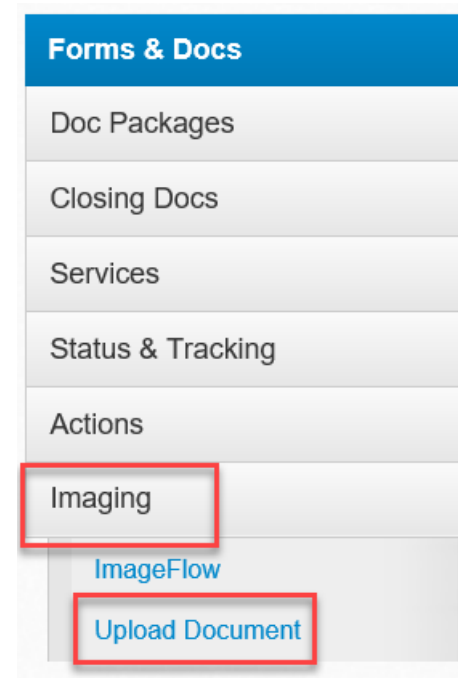
Select “Imaging”

Select “Upload Document”

- To find your document click ‘Browse’
  - Locate the file on your computer that you want to upload  
(make sure it is not password protected)
  - If the document is to be loaded in color check ‘Upload in Color’

NOTE: It is recommended that only appraisals be uploaded in color due to the speed of uploading

- Click the Arrow on right of ‘Document Type’ field and select the description that best matches what you are uploading
- Click ‘Submit’ and repeat process until all your documents are uploaded



Project: Loan Documents

Document Upload

File Information

File To Upload  Browse...

Upload in Color

Assign To Loan

Loan: [REDACTED] Change

Borrower: [REDACTED] Clear

Document Information

Document Type

Submit Reset



End of document