LIBRARY

Investor Overlay Form
- Custom form that lists all approved correspondent investors
- Form allows Underwriting to alert Secondary where loan can or cannot be sold to based on underwriting decision
- Form comes with custom hedge allocation report which assists in loan allocation process
- Limits re-allocations/buy-backs

Lock Comparison Form
- Custom form that compares a series of crucial pricing data points between loan data and lock data
- Form comes with business rules that prevents file from proceeding if there is a lock to loan discrepancy
- Instantly notify Secondary when discrepancy occurs
- Allows for discrepancies to be addressed prior to loan close.

Reverse Mortgage Form
- Custom form that tracks Reverse Mortgage loans to be entered for pipeline tracking
- Form comes with Reverse Mortgage Loan Program creation and custom report and pipeline view for tracking Reverse Mortgages
- Form consists of Reverse Mortgage Datapoints that allows for NMLS report generation & tracking

Secondary Pricing Form
- Custom form that tracks 4 levels of Secondary pricing for true mandatory loan level profitability tracking
- Form identifies Best Effort expectations & Mandatory pricing based on Purchase Advice reconciliation

Shipping Details Form
- Custom form to track Shipping Allocation
- Custom data points to track packages received & sent dates as well as Metric tracking for Early Delivery Rebates

Title Order Form
- Title orders through National Title Company & returns automatically to efolder
- Title Calculator with National Title Company updates fees on GFE to limit tolerance cures or lender credit incurred with underdisclosed loans
- Status updates to National Title Company to limit processing of adverse loans

VA Checklist
- Custom form that tracks all company specific VA loan workflow requirements
- Form includes all company required data and document requirements for VA loans

Post Closing Suspense Form
- Custom form that tracks all Investor related suspense items to allow firm to track trending of investor suspense items
- Form includes suspense categories within drop down on custom form and creation of custom reports and/or pipeline views allocation of responsible dept/loan team member to assist in determining source of suspended item

Post Closing Form
Custom Form that tracks workflow specific post closing items including business rules, tracking of dates, and loan program requiredItems, including Shipping, Loan Insuring, MERS registration and Transfer, Investor purchase, and trailing document

CUSTOM DEVELOPMENT LIBRARY

igniting ideas for the mortgage industry.

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UW Tracking/Touches Form
- Custom form that tracks number of touches between Underwriting and Processing from Conditional Approval to Clear to Close.
- Form tracks key date & data components to be utilized in a custom report or dashboard that displays number of touches from a variety of views

Escrow Holdback Form
- Custom form that gets triggered when there is a property related escrow hold-backs are required on loan.
- Custom Form will track Escrow requirements and Escrow line level categories with Due dates, Approved Dates, Disbursement Dates, and comments fields

Loan Insuring Details Form
- Custom form that tracks key components needed for Insuring Tracking within Loan (MIP Remittance Amt, Remittance Date, Case #, Previous Case #, etc)
- Rating Screen
- Custom Form for rating specific loan level & borrower details that can be used by the Loan Officer to determine potential flaws with the loan or credit profile of borrower

Appraisal Tracking Form
- Custom form that tracks company specific Appraisal related information including Order Date, Order Received Date, Underwriter comments, and second appraisal requests
- Form includes custom Appraisal tracking report

Warehouse Line Advance Form
- Custom form that tracks accurate warehouse funding amounts based on haircut levels and gross and net funding requirements
- Form comes with warehouse required custom funding request form with haircut levels linked into form

UW Snapshot Form
- Custom Underwriting form that takes a snapshot of loan file at time of Initial UW & identifies items that have changed since last UW review
- Form includes audit check at loan level to determine changes & highlight those changes to the UW

SubServicer - DMI Integration
- DMI custom form with automation to ensure accurate SubServicer tracking & delivery to DMI
- Custom report with translations to ensure accurate data delivery to SubServicer

SubServicer - LoanCare Integration
- Loan Care custom form with automation to ensure accurate
- SubServicer tracking & delivery to Loan Case

Custom report with translations to ensure accurate data delivery to SubServicer

Suspense Reconciliation Form
- Custom form that tracks Suspended Items within a loan & allows for (LO/LP) rebuttal or Suspense reconciliation

MI Form Form
- Custom Mortgage Insurance Form that tracks key Mortgage Insurance Data points at loan level.

Trailing Docs Tracking Form
- Workflow process that creates trailing document requirement for all funded loans
- Operation includes a process that tracks Recorded Mortgage and final title policy and end investor
- Form comes with Investor specific report that tracks open trailing documents for all loans sold to investor

Disclosures Instructions Shortcut
- Custom button that will generate pop up screen with specific step by step instructions for accurate disclosure issuance
- Form identifies RESPA points & allows user to identify items in a single popup

COC Instructions Shortcut
- Custom button that will generate pop up screen with specific step by step instructions for Change of Circumstance process

Net Tangible Benefit Shortcut
- Custom button that will generate pop up screen with specific step by step instructions for proving Net Tangible Benefit on a loan level

FHA Addendum Shortcut
- Custom button that will generate pop up screen with specific step by step instructions for correctly completing FHA addendum for accurate disclosure issuance

Borrower Summary Form
- Custom Borrower Summary that drives full loan origination process via the Borrower Summary
- Form includes Loan Origination workflow review and full development of origination requirements
- Form also include shortcuts & instructions to key loan components completed by the user

NMLS Info Form
- Custom Form that identifies all NMLS info on a single screen.
- Streamlines NMLS reporting & allows Compliance to easily identify NMLS exceptions generated through NMLS reporting

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