

Wholesale – How to Register and Submit a Loan

Register Loan

- **Login** to TPOC
- Go to **Add New Loan**
- Select Channel (Wholesale)
- Select Loan Officer and Loan Processor
- Import 3.4 File > Click Next
- Add Estimated Closing Date, Loan Documentation Type and Closing Type
- Under Additional Fields>Product Indicator>Select from dropdown
- Review the remaining application uploaded, then **Click Register**
- **Once loan registered - eConsent will be sent to Borrower**

Reissue Credit Report

- Click on **Order Credit**
- Select Credit Provider
 - Click Reissue Credit
- Add Refence Number from the Credit Report
- Add Request Type from drop down
- Must be Tri-Merge Report

Upload Loan Documents

- Click on Loan Documents tab
- Upload a copy of the Credit Report
- Under Loan Documents tab>Upload all loan documents to **Loan Submission folder**
 - If **submission to Underwriting**, upload all documents on the checklist:
 - Wholesale = Wholesale Submission Checklist
 - If **income only review**, upload the income documents for Underwriter to calculate income

Request Income Only Review

- Click on **Income Review Request**
 - Underwriting will be notified of request

Request UW Review Request

- Click on **UW Review Request**
 - Intake Coordinator will be notified to prepare file for Underwriting and Disclosure Desk will be notified to send initial disclosures