

Non-Delegated Correspondent – How to Register and Submit a Loan

Register Loan

- **Login** to TPOC
- Go to **Add New Loan**
- Select Channel (Correspondent Non-Delegated)
- Select Loan Officer and Loan Processor
- Import 3.4 File > Click Next (May manually input loan)
- 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**

Reissue Credit Report

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

Product and Pricing

- Click on Product Pricing & Lock tab
- Select loan program and rate then Register

Upload Loan Documents

- Click on Loan Documents tab
- Under Loan Documents tab> Upload a copy of the Credit Report
- Under Loan Documents tab>Upload income and property documents (Appraisal not required for initial submission) to **Loan Submission folder**

Request UW Review

- Click on **UW Review Request** > Continue
 - Intake Coordinator notified to prepare file for Underwriting