

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
- Enter Borrower First and Last Name (*Import 3.4 file with application information, but not required*)
- Under Additional Fields (Click Register, then these fields will pop up to complete)
 - Specialty Products>Select from dropdown
 - Income documents>Select income type for underwriter to calculate income
- Under Lender Loan Information tab
 - Subject Property State (confirm licensing)
 - Complete Property will be (Primary, Secondary, Investment)
 - Purpose of Loan (Purchase, Cash-Out Refi, No Cash-out Refi)
 - Mortgage Type Applied For (Conventional)
 - Mortgage Lien Type (First Lien)
- Click Register

Upload Loan Documents

- Click on Loan Documents tab
 - Upload Income documents to **Loan Submission folder** for Underwriter to calculate income

Request Income Only Review

- Click on **Income Review Request**
 - Underwriting Department notified to review request