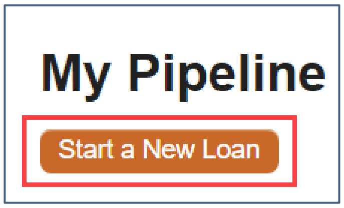
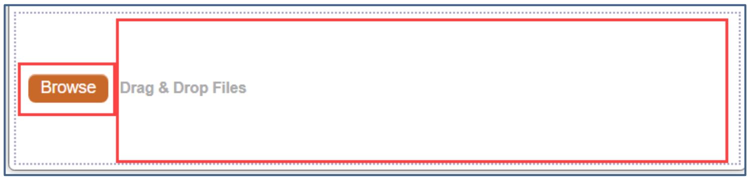
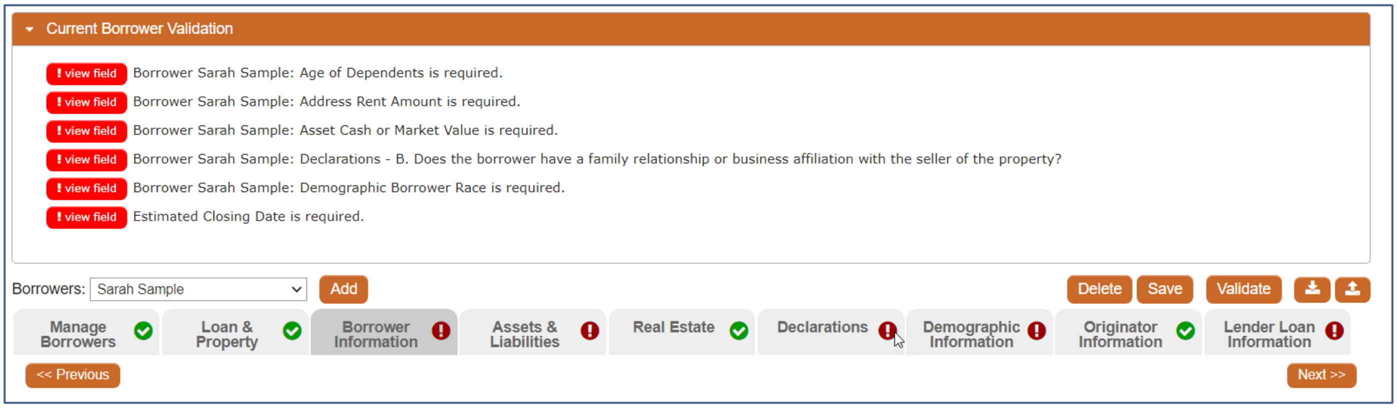
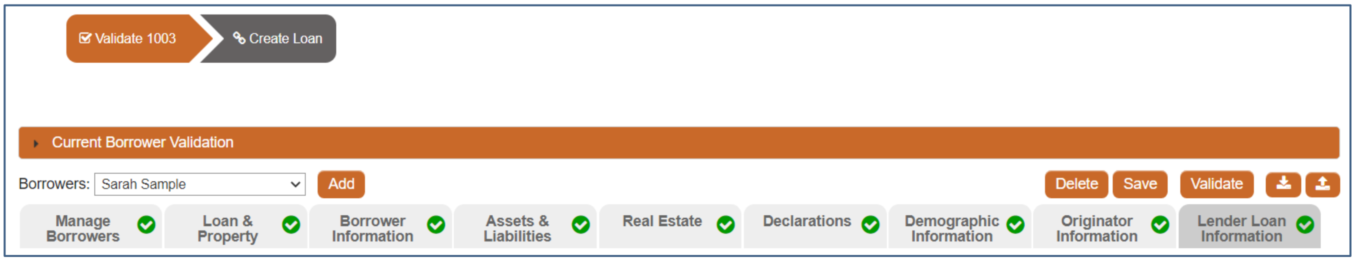
NEW FILE SUBMISSION
Non-Delegated Quick Guide

Introduction

This Quick Guide outlines the new file submission process. For complete details, refer to the [Non-Delegated Portal Guide] located on our website.

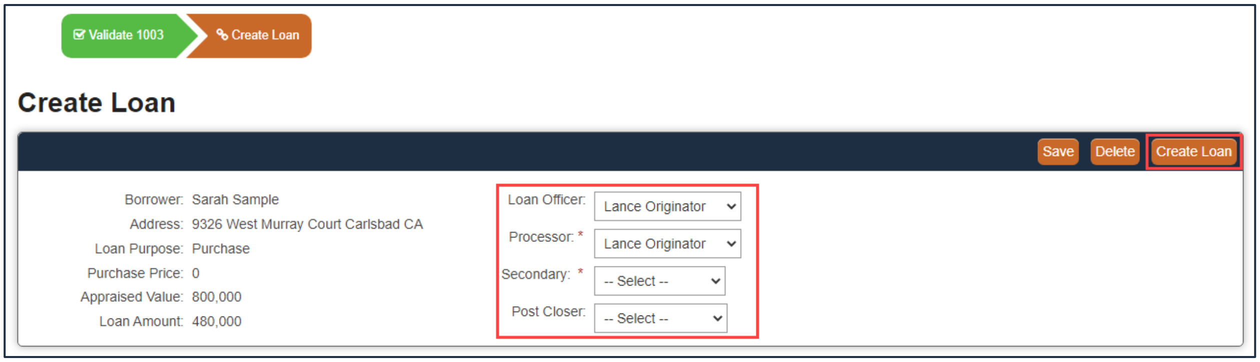
Step	How To	
1.	From the **My Pipeline** screen in the Portal, click on the **Start New Loan** button.	
2.	Export the MISMO 3.4 file from your LOS to your computer. Click to **Browse** or **Drag & Drop** the file to start the loan.	
3.	Validation errors (if applicable) will be notated in the upper section of the 1003 editor. Click each **!View Field** button and updated field notated in red. Once all validation errors are clear, click **Save** and **Validate.** 		
4.	Once the validation errors are cleared, click **Create Loan** to continue. 		

5.

Loan Officers and Processors: Your name will show as both Loan Officer and Processor, this is intentional. Please leave as is. Select the appropriate person from the **Secondary** menu for locking purposes (mandatory). You may also select the Post Closer if known (optional).

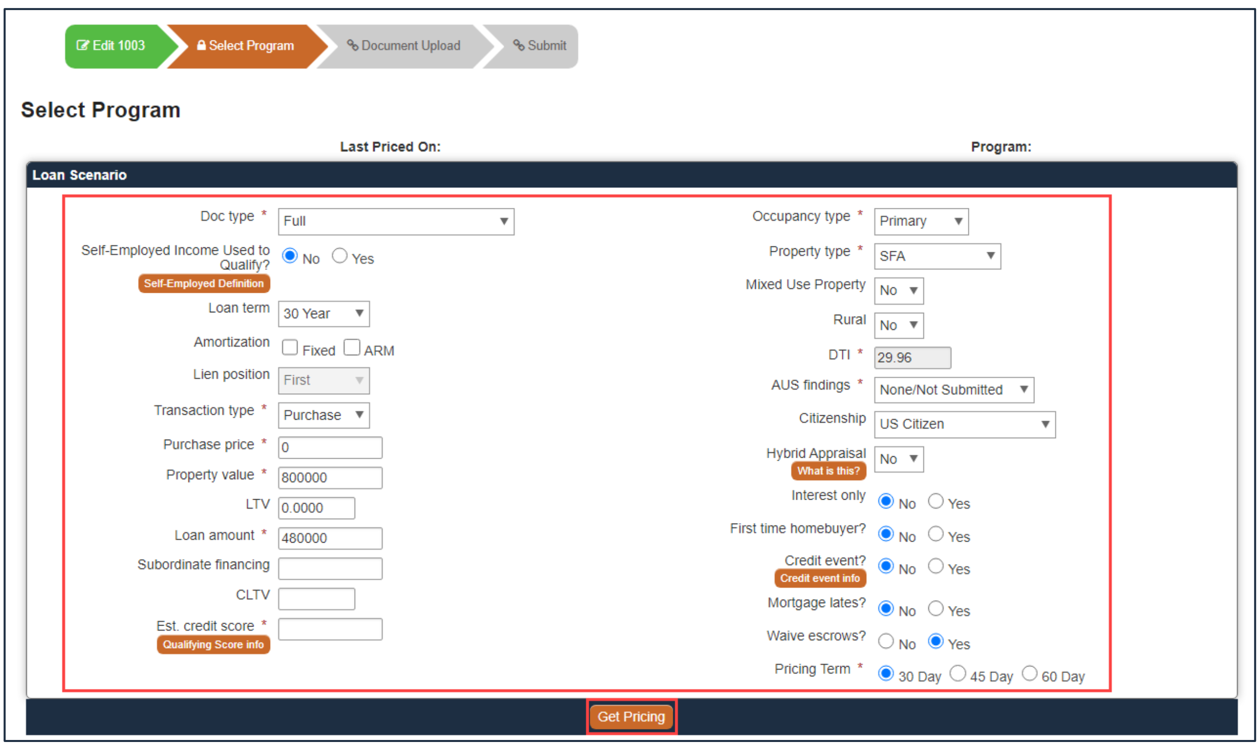
Secondary: Your name will show as both Loan Officer and Processor, this is intentional. Please leave as is. You will also be assigned as the **Secondary** role for locking purposes (mandatory). You may also select the Post Closer if known (optional).

Post Closers: Your name will show as both Loan Officer, Processor and Post Closer, this is intentional. Please leave as is. Select the appropriate person from the **Secondary** menu for locking purposes (mandatory).



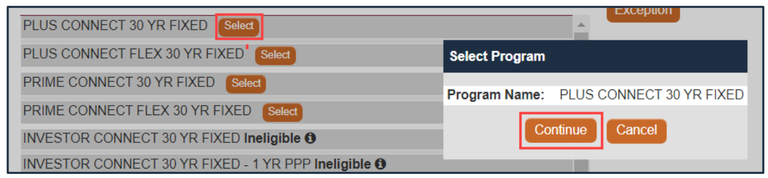
6.

Enter **Loan Scenario** details. Once all fields are entered, click the **Get Pricing** button.



7.

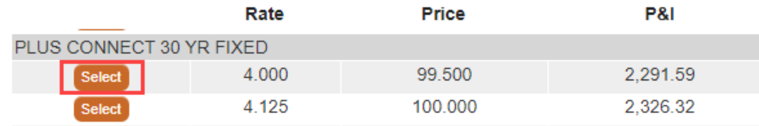
Loan Officers, Processors, Post Closers: You will **not** see complete rate and pricing details. This is intentional. Select the loan program and click **Continue.**



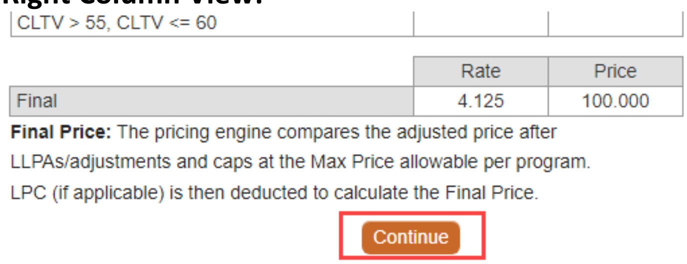
Secondary: You will see complete complete rate and pricing details. Click **Select** next to the rate under the appropriate program.

Click **Continue.**

Left Column View:

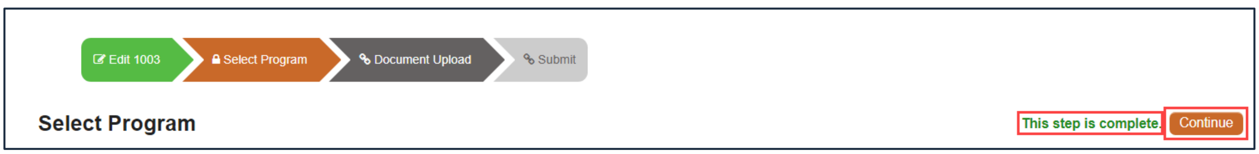


Right Column View:



8.

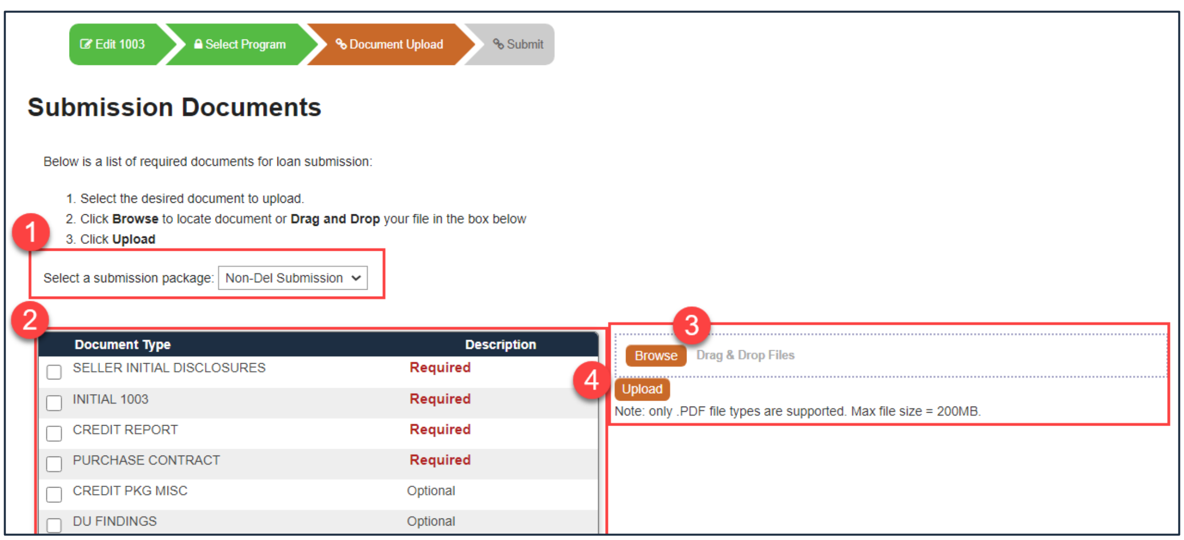
Once the program is selected, the message **This step is complete** will appear, click **Continue.**



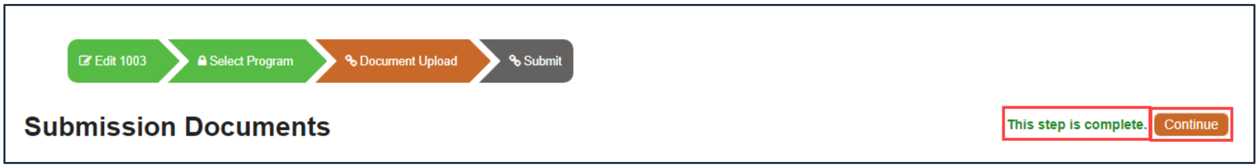
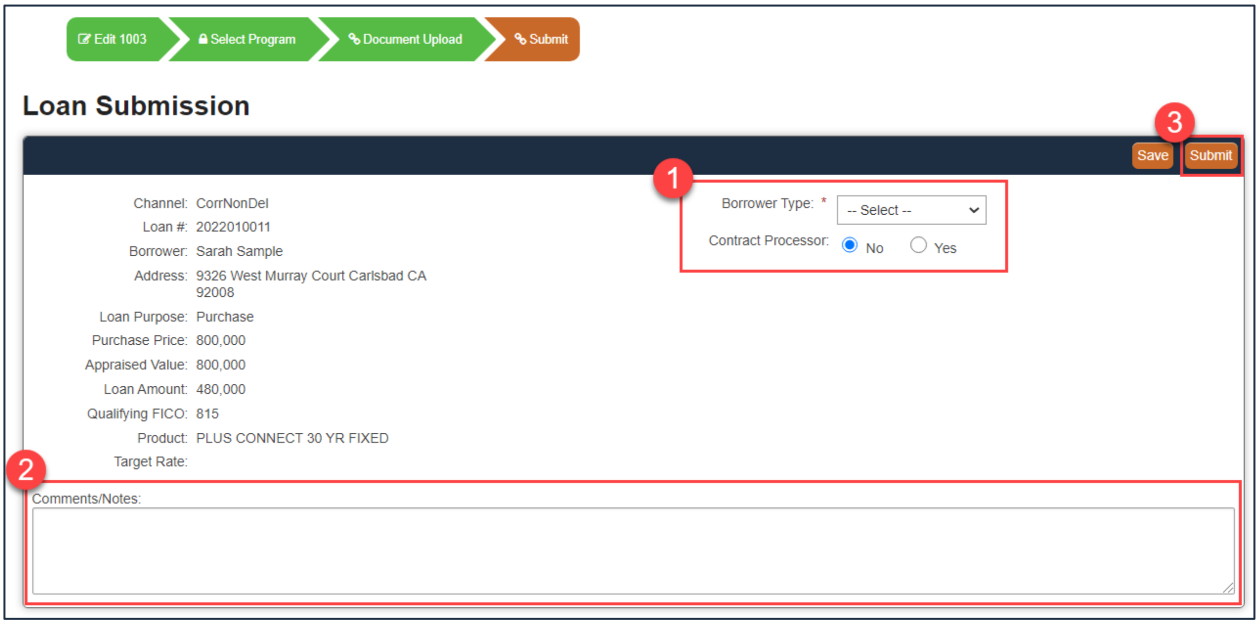
9.

Complete the Document Upload Process:

1. Select **Non-Del Submission** from the drop-down menu
2. Select the checkbox next to the document for upload
3. **Browse** or **Drag & Drop** the PDF
4. Click **Upload** to complete the upload



You may also select multiple checkboxes and upload 1 PDF with all the submission documents.

<table>
<tr><td>10.</td><td>Once the documents are uploaded, This step is complete will appear, click Continue.

</td></tr>
<tr><td>11.</td><td>Complete the Loan Submission details:
1. Select the Borrower Type from the drop down menu
2. Enter any loan details you would like our team to consider as they review the file
3. Click Submit

</td></tr>
</table>

Congratulations, you have submitted your loan!

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