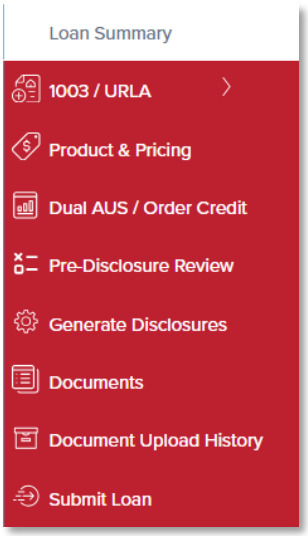
NATIONS DIRECT MORTGAGE
Your Partner For Prosperity

Broker Disclose Prior to Submit Job Aid

Purpose

To support and streamline the loan workflow, updates have been implemented within the Loan Manager system. These updates include the removal of the requirement to submit a loan prior to generating disclosures.

Updated Workflow



After you have added a new loan to the system, you will go through the following tasks:

- Review the 1003/URLA to ensure all data points flowed over correctly
- Select Product & Pricing for the loan
- Order or Reorder Credit and AUS
- Click on Pre-Disclosure Review to ensure all data is accurate to register the loan
- Generate Disclosures – for additional details on how to complete this step, please refer to the Broker Generated Disclosure Job Aid
  ***Please note**: If you are uploading a Correspondent submission or have selected a different disclosure path on your Wholesale loan, generate disclosures may be unavailable or skipped*
- Upload Documents you wish to have reviewed at the time of submission.
  ***Please note:** Document Upload History is a new feature you can use to review what documentation has been submitted and when.*
- Submit Loan – this is when the loan will come over to us for review.

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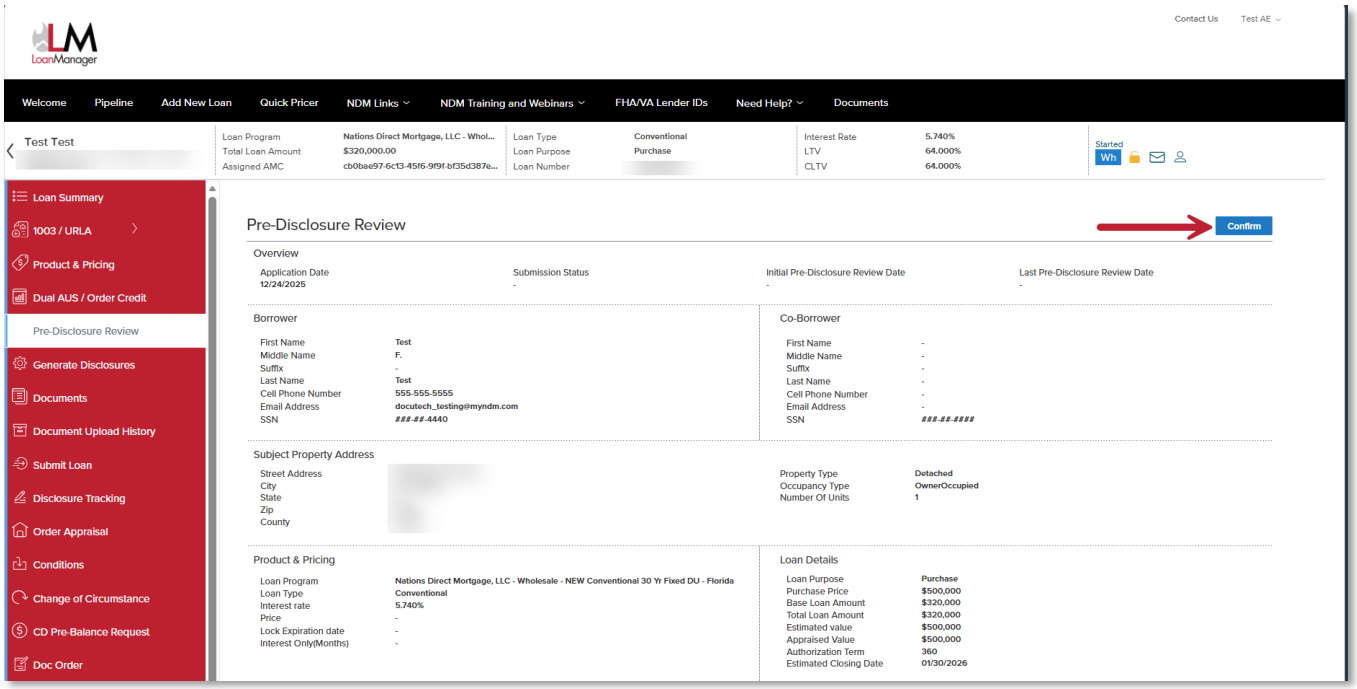
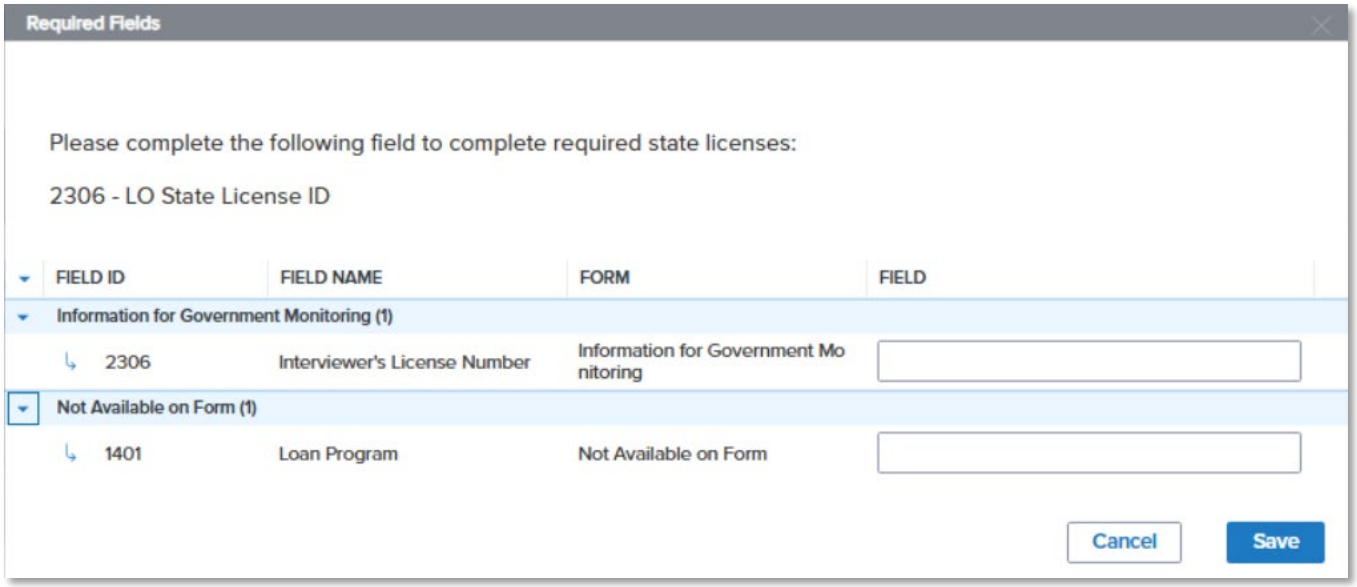
Instructions

STEP 1

- Click on the Pre-Disclosure Review.
- Review the information to ensure it is accurate, then click Confirm.
- This is going to register the loan within our system but will not be submitted. *Note: If anything is inaccurate, go back to the 1003/URLA section to update and save.*



If anything is incomplete, you will receive a pop-up message that looks like this. The information must be completed to move forward.



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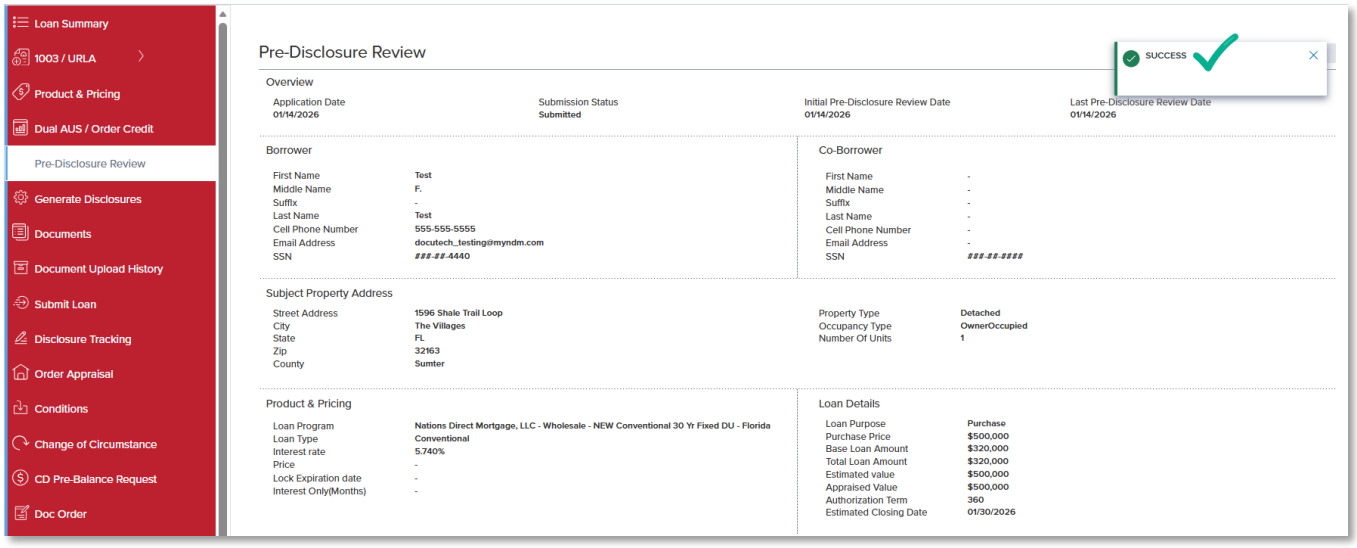
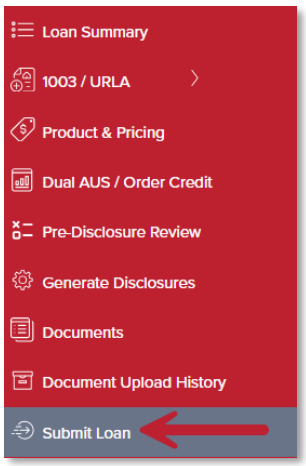
STEP 2

Once registered, you will receive a Success message.
Next steps *(not documented here)* are to Generate Disclosures and Upload Documents.



STEP 3

When you are ready for the loan to go over to our Loan Setup Team for review, click on Submit Loan



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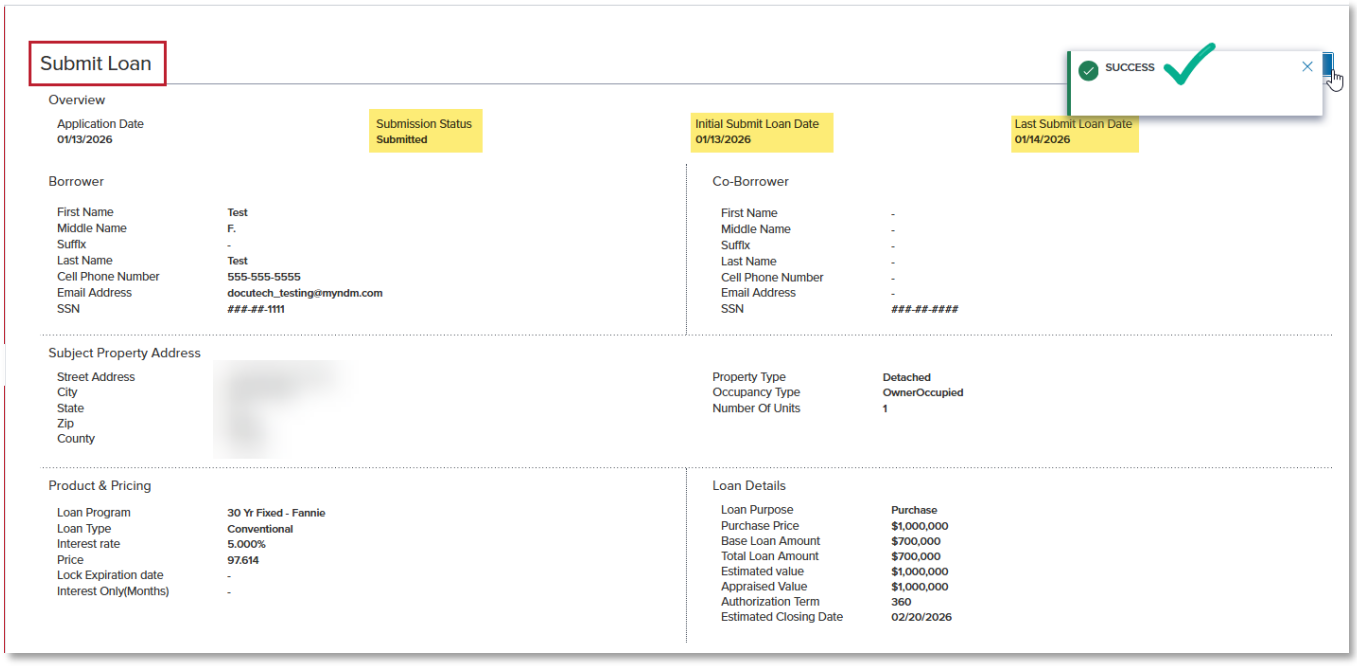
STEP 4

Once submitted, you will receive a notification showing the submission is successful.
In addition, it will show the Submission Status as Submitted along with the Initial Submit Loan Date and Last Submit Loan Date.



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