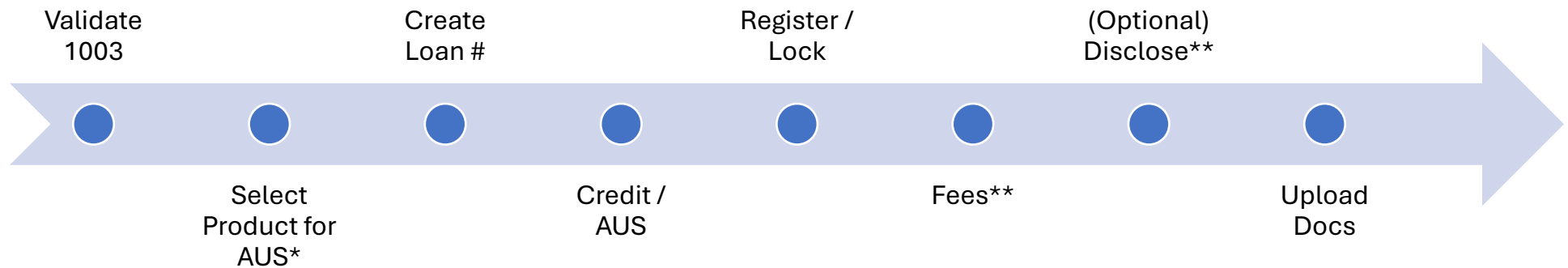


Bolt – How to Submit a Loan

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Select Product (Agency Loans)	7
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Overview of Submission Process

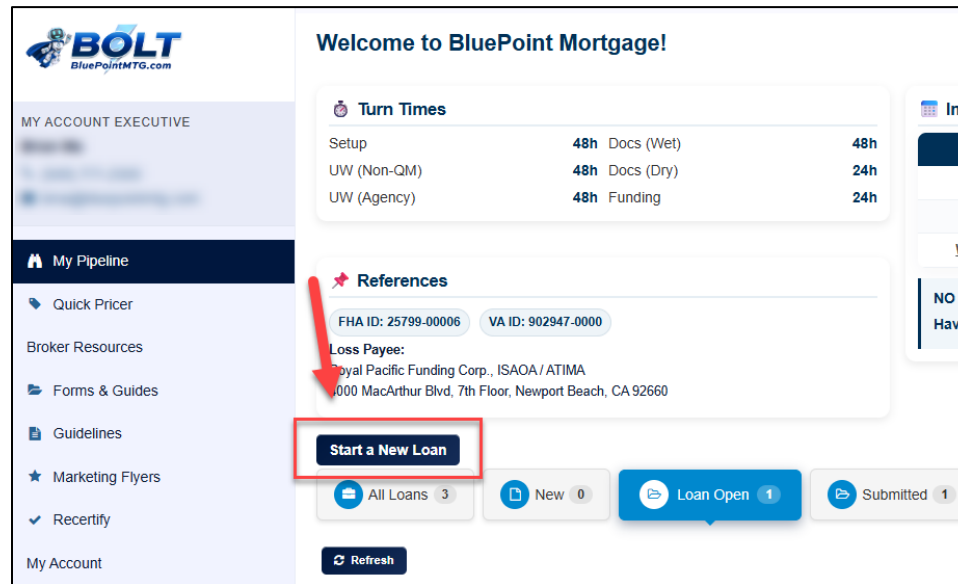


*Agency loans only

**Not applicable to correspondent submissions

Start Loan

From the pipeline tab, go to “Start a New Loan”:



BOLT
BluePointMTG.com

MY ACCOUNT EXECUTIVE

My Pipeline

- Quick Pricer
- Broker Resources
- Forms & Guides
- Guidelines
- Marketing Flyers
- Recertify
- My Account

Welcome to BluePoint Mortgage!

Turn Times

Item	Time	Docs	Time
Setup	48h	Docs (Wet)	48h
UW (Non-QM)	48h	Docs (Dry)	24h
UW (Agency)	48h	Funding	24h

References

FHA ID: 25799-00006 VA ID: 902947-0000

Loss Payee:
Royal Pacific Funding Corp., ISAOA / ATIMA
1000 MacArthur Blvd, 7th Floor, Newport Beach, CA 92660

Start a New Loan

All Loans 3 New 0 Loan Open 1 Submitted 1

Refresh

Start a Loan

There are two ways to start a new loan registration:

Loan Setup

Is this file Non-QM? * ☐ Yes ☒ No

File Upload
Upload an existing MISMO 3.4 file

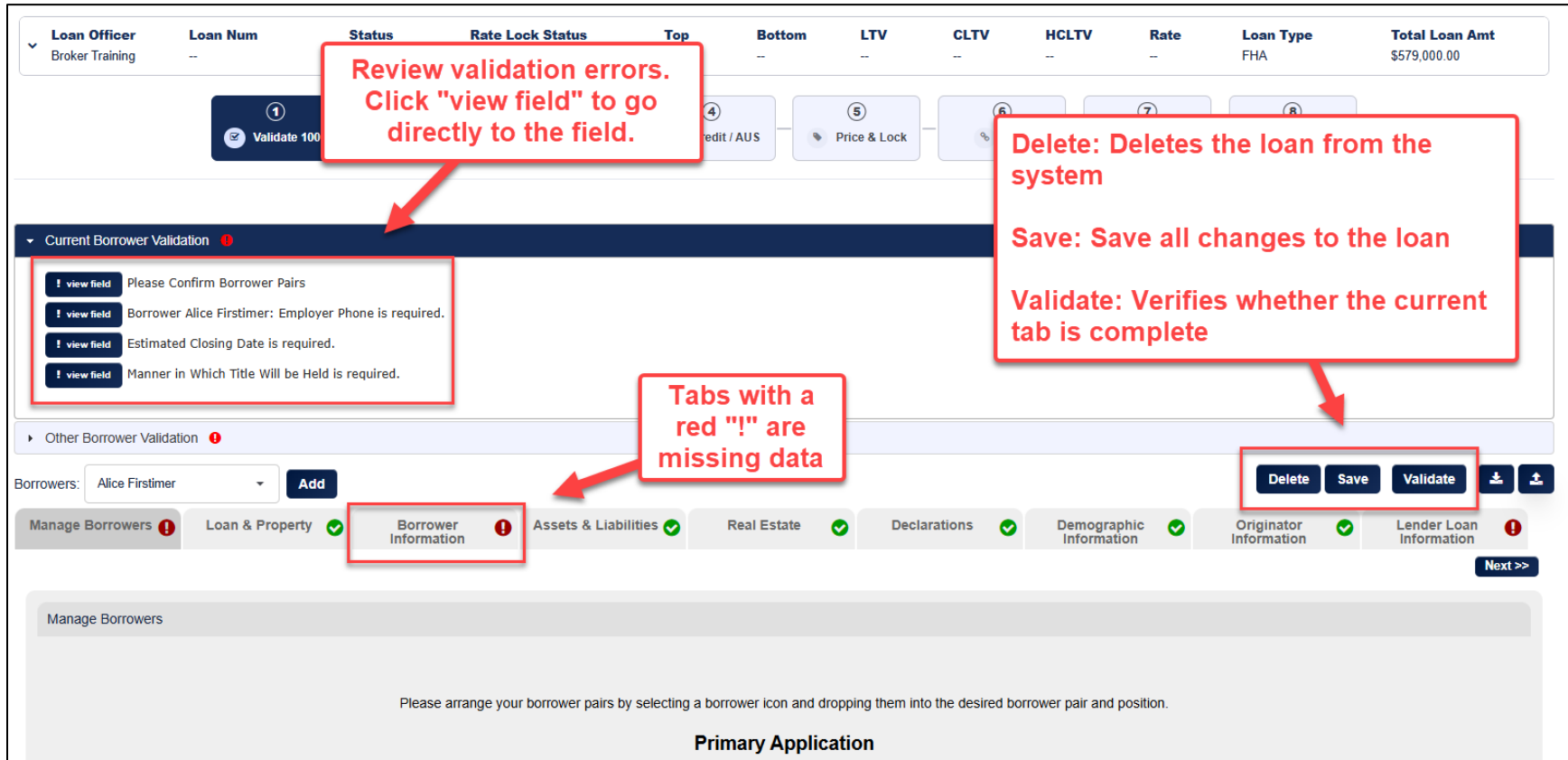
Import 3.4...

...or create a manual app

1003 Form
Use our online 1003 form to create a new file

Validate 1003

Verify that the loan application data is correct. The system flags missing/incomplete info.



Review validation errors. Click "view field" to go directly to the field.

Delete: Deletes the loan from the system

Save: Save all changes to the loan

Validate: Verifies whether the current tab is complete

Tabs with a red "!" are missing data

Current Borrower Validation

- view field Please Confirm Borrower Pairs
- view field Borrower Alice Firsttimer: Employer Phone is required.
- view field Estimated Closing Date is required.
- view field Manner in Which Title Will be Held is required.

Other Borrower Validation

Borrowers: Alice Firsttimer **Add**

Manage Borrowers **Loan & Property** **Borrower Information** **Assets & Liabilities** **Real Estate** **Declarations** **Demographic Information** **Originator Information** **Lender Loan Information** **Next >>**

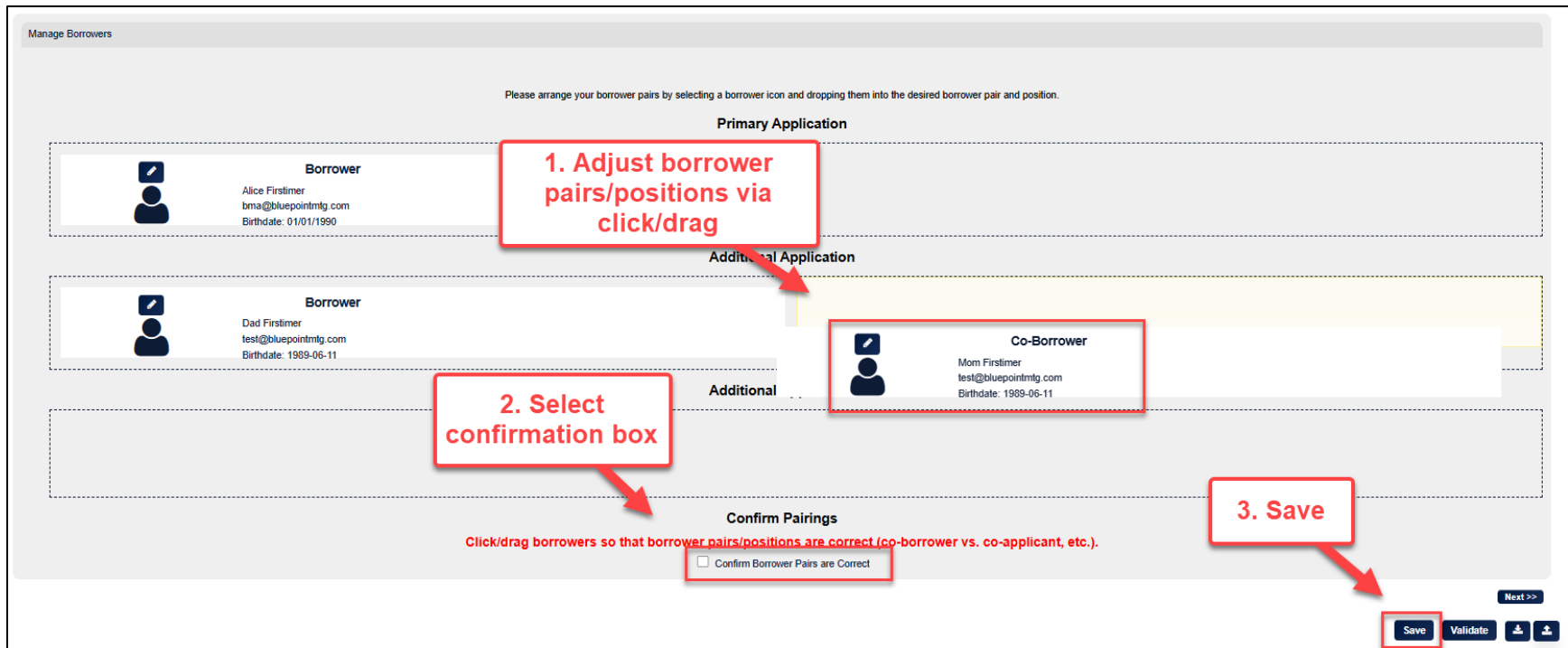
Primary Application

Please arrange your borrower pairs by selecting a borrower icon and dropping them into the desired borrower pair and position.

Verify Borrower Pairings

Confirm that the borrowers' placements are correct. For joint applications, click/drag borrowers as needed.

 For joint applications with two borrowers on the same credit report, please ensure both borrowers are placed into a single application. This step must be completed accurately to ensure a successful credit reissue later.

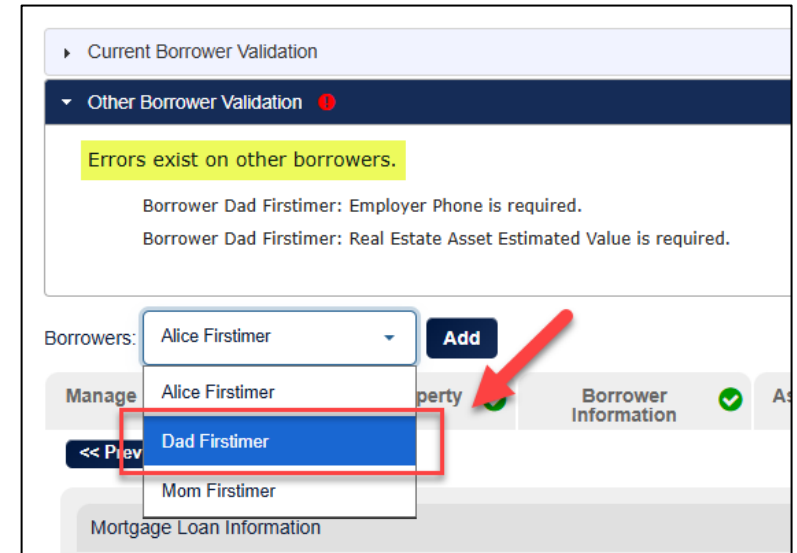


The screenshot shows the 'Manage Borrowers' interface. At the top, it says 'Please arrange your borrower pairs by selecting a borrower icon and dropping them into the desired borrower pair and position.' Below this, there are three sections: 'Primary Application', 'Additional Application', and 'Additional'. The 'Primary Application' section contains a 'Borrower' card for Alice Firstimer. The 'Additional Application' section contains a 'Borrower' card for Dad Firstimer. The 'Additional' section contains a 'Co-Borrower' card for Mom Firstimer. A red callout box labeled '1. Adjust borrower pairs/positions via click/drag' points to the borrower cards. A red callout box labeled '2. Select confirmation box' points to a checkbox labeled 'Confirm Borrower Pairs are Correct' in the 'Confirm Pairings' section. A red callout box labeled '3. Save' points to a 'Save' button in the bottom right corner. The 'Confirm Pairings' section also includes the text 'Click/drag borrowers so that borrower pairs/positions are correct (co-borrower vs. co-applicant, etc.).' and a 'Next >>' button.

Switching Applications

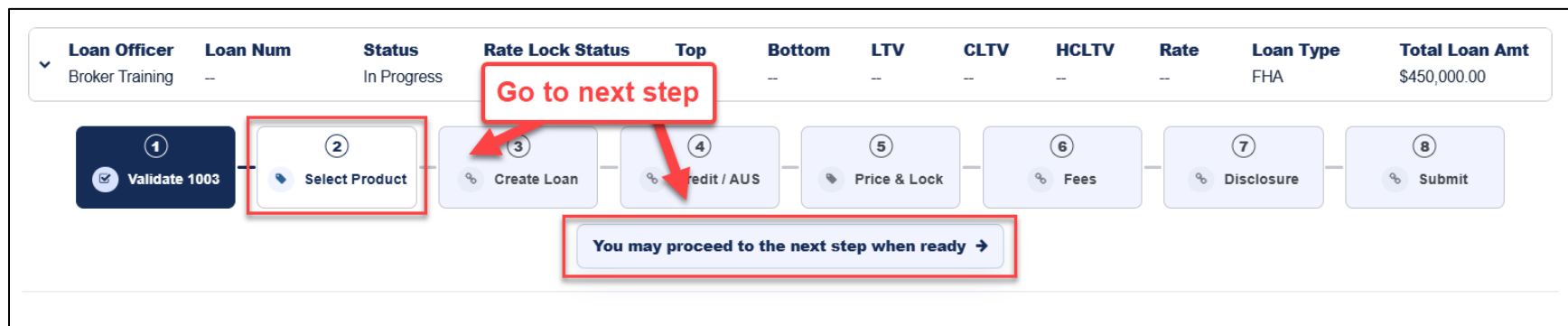


Switch to a different borrower to view their application. Loans with multiple borrowers may need validation for each borrower.



Advance to Next Step

Throughout the submission process, Bolt will open access to the next step once the current step is complete. To advance, click either the white icon in the status tracker or the “You may proceed...” button:



Select Product (Agency Loans)

This step prices and registers a rate for AUS submission.

Loan Officer	Loan Num	Status	Rate Lock Status	Top	Bottom	LTV	CLTV	HCLTV	Rate	Loan Type	Total Loan Amt
Broker Training	--	In Progress	Not Locked	--	--	--	--	--	--	FHA	\$579,000.00

1 Validate 1003

2 Select Product

3 Create Loan

4 Credit / AUS

5 Price & Lock

6 Fees

7 Disclosure

8 Submit

LOAN SCENARIO 2

PRICING DETAILS

GET PRICING

Loan Information

Non QM *

No

Property Value *

\$ 600,000

Loan Term *

30 Year

Loan Type *

FHA

Loan Amount *

\$ 579,000

Amortization *

Fixed

Doc Type *

Full Doc

LTV *

96.500

%

Subordinate Financing

\$ 0

Loan Purpose *

Purchase

CLTV *

96.500

%

Purchase Price *

\$ 600,000

Gross Loan Amount

\$ 589,132

Borrower Information

FICO *

Citizenship *

US Citizen / Permanent Resident

Property Information

1. Complete all missing fields labeled with a red *

2. Get Pricing

Loan Officer
Broker Training

Loan Num
--

Status
In Progress

Rate Lock Status
Not Locked

Top
--

Bottom
--

LTV
--

CLTV
--

HCLTV
--

Rate
--

Loan Type
FHA

Total Loan Amt
\$579,000.00

1
Validate 1003

2
Select Product

3
Create Loan

4
Rate Stack

5
Price & Lock

6
Fees

7
Disclosure

8
Submit

LOAN SCENARIO

PRICING DETAILS

GET PRICING

100 BASE

ZERO BASE

Search rate or price

Loan Information

Non QM *
No

Property Value *
\$ 600,000

Loan Term *
30 Year

Loan Type *
FHA

Loan Amount *
\$ 579,000

Amortization *
Fixed

Pricing Results

Rate	APR	30 Day Price	Rebate / Discount	P&I	DTI
BluePoint 30 Yr FHA Standard					
5.625	6.597	100.298	\$(1,755)	\$3,391.38	17.241
BluePoint 30 Yr FHA Standard 2/1 B					
5.625	6.597	100.298	\$(1,755)	\$3,391.38	17.241

Create Loan

Assign users to the role, then hit “Create Loan”:

Loan Officer

Broker Training

Loan Num

--

Status

In Progress

Rate Lock Status

Not Locked

Top

--

Bottom

--

LTV

--

CLTV

--

HCLTV

--

Rate

--

Loan Type

FHA

Total Loan Amt

\$579,000.00

1

Validate 1003

2

Select Product

3

Create Loan

4

Credit / AUS

5

Price & Lock

6

Fees

7

Disclosure

8

Submit

Create Loan

Save

Delete

Create Loan

Borrower:

Alice Firstimer

Co Borrower:

Dad Firstimer

Address:

123 Test Dr Avenel NJ

Loan Purpose:

Purchase

Purchase Price:

600,000

Appraised Value:

600,000

Loan Amount:

579,000

Credit Score:

700

Product:

BluePoint 30 Yr FHA Standard

Rate:

5.500

Price:

100.018

Channel:

Wholesale

Loan Officer: *

Broker Training

Processor:

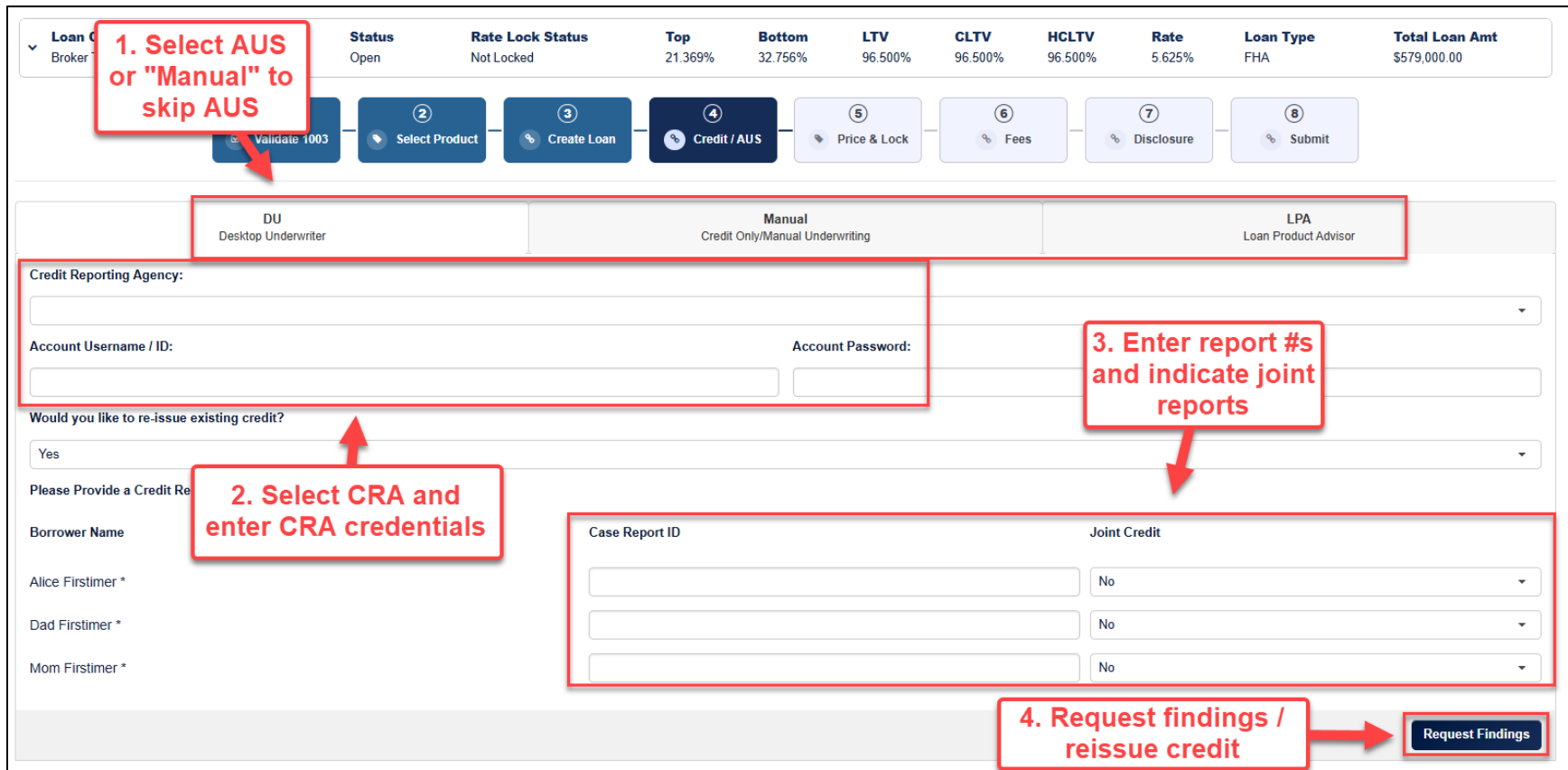
Broker Training

Additional Processor:

-- Select --

Credit / AUS

This step is for reissuing credit reports and (optionally) running an AUS.



The screenshot shows the 'Credit / AUS' step in the BluePoint Mortgage workflow. The interface includes a top navigation bar with loan details, a central progress bar with eight steps, and a main form area with various input fields and checkboxes. Four red callout boxes with arrows point to specific elements:

- 1. Select AUS or "Manual" to skip AUS:** Points to the 'Credit / AUS' step in the progress bar.
- 2. Select CRA and enter CRA credentials:** Points to the 'Credit Reporting Agency' dropdown and the 'Account Username / ID' and 'Account Password' fields.
- 3. Enter report #s and indicate joint reports:** Points to the 'Case Report ID' and 'Joint Credit' dropdowns.
- 4. Request findings / reissue credit:** Points to the 'Request Findings' button.

The form fields include:

- Loan Details:** Loan C Broker, Status (Open), Rate Lock Status (Not Locked), Top (21.369%), Bottom (32.756%), LTV (96.500%), CLTV (96.500%), HCLTV (96.500%), Rate (5.625%), Loan Type (FHA), Total Loan Amt (\$579,000.00).
- Progress Bar:** 1. Validate 1003, 2. Select Product, 3. Create Loan, 4. Credit / AUS, 5. Price & Lock, 6. Fees, 7. Disclosure, 8. Submit.
- Underwriting Options:** DU (Desktop Underwriter), Manual (Credit Only/Manual Underwriting), LPA (Loan Product Advisor).
- Credit Reporting Agency:** Dropdown menu.
- Account Username / ID:** Text input field.
- Account Password:** Text input field.
- Would you like to re-issue existing credit?:** Yes/No dropdown.
- Please Provide a Credit Report:** Section with Borrower Name (Alice Firstimer *, Dad Firstimer *, Mom Firstimer *).
- Case Report ID:** Text input field.
- Joint Credit:** No/Yes dropdown.
- Request Findings:** Button.

If AUS was run, go to “View DU Findings Report” to see the AUS results. If the results contain errors, consider revisiting the Validate 1003 step to confirm data accuracy:

Loan Officer	Loan Num	Status	Rate Lock Status	Top	Bottom	LTV	CLTV	HCLTV	Rate	Loan Type	Total Loan Amt
Broker Training		Open	Not Locked	21.369%	27.015%	96.500%	96.500%	96.500%	5.625%	FHA	\$579,000.00

1 Validate 1003

2 Select Product

3 Create Loan

4 Credit / AUS

5 Price & Lock

6 Fees

7 Disclosure

8 Submit

You may proceed to the next step when ready →

Account Username / ID:
asdfs

Account Password:

Would you like to re-issue existing credit?
Yes

Please Provide a Credit Report Case ID for Each Borrower

Borrower Name	Case Report ID	Joint Credit
Alice Firstimer *	sadfsad	No
Dad Firstimer *	asfassad	Yes
Mom Firstimer *	asdfasdf	Yes

DU run on 2026-07-16 15:17:30 Run Status: OK

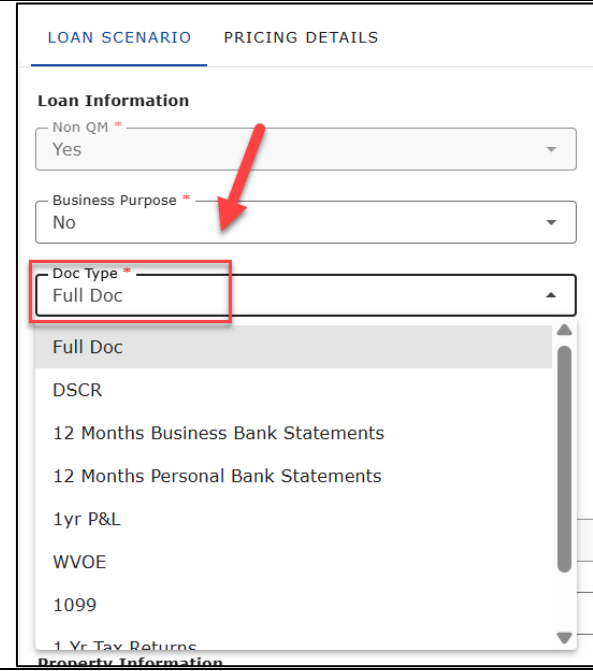
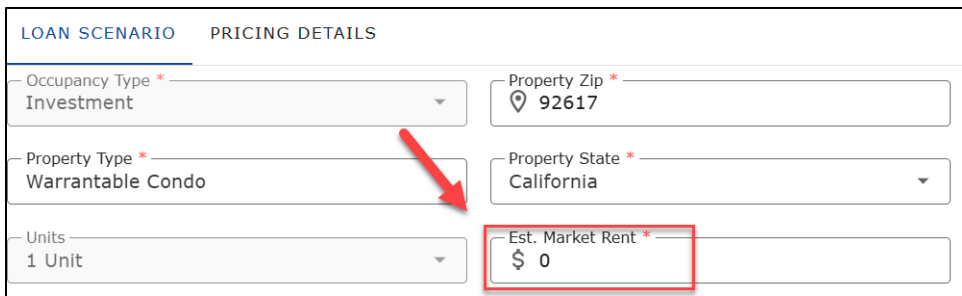
View DU Findings Report

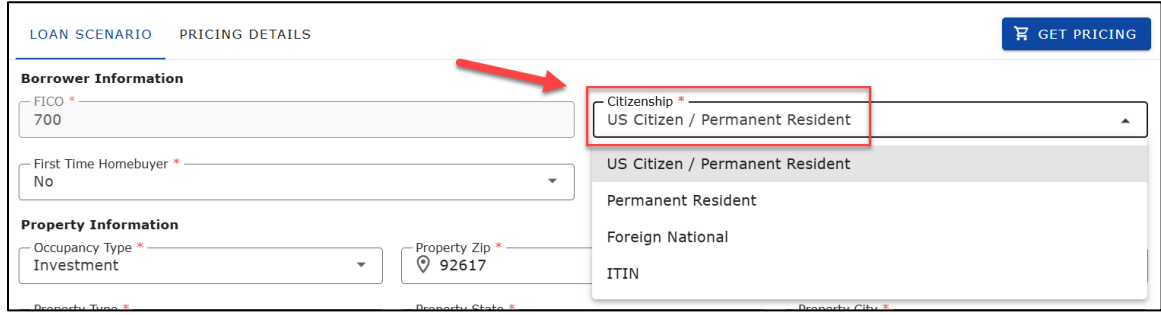
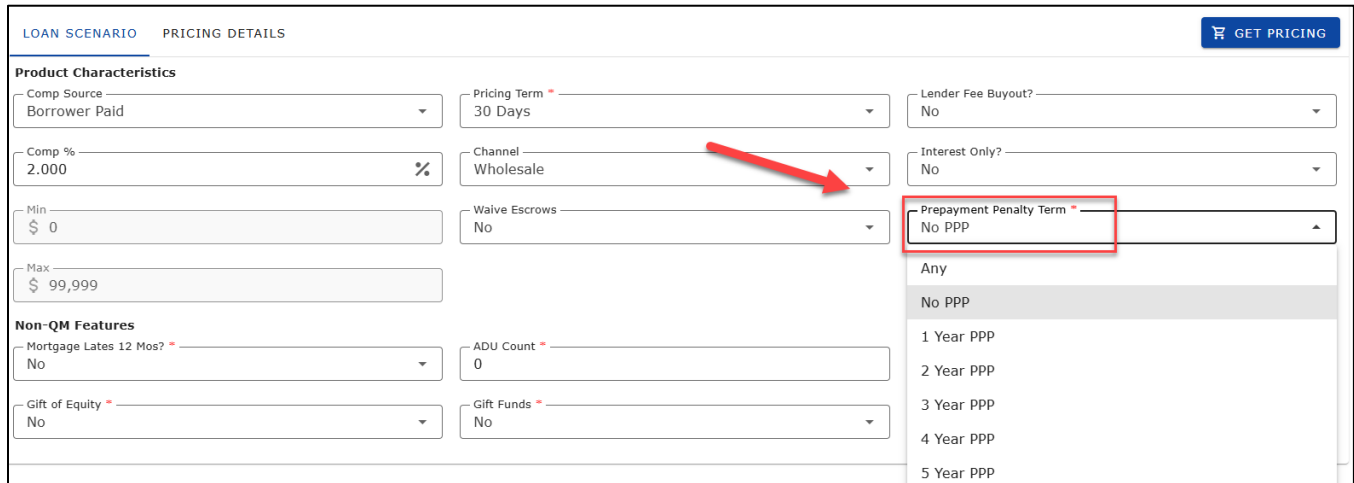
Printer Friendly DU Findings Report

Request Findings

Price & Lock

This step is for registering a rate/program and optionally requesting a rate lock. Please ensure the following fields are completed to ensure accurate results:

Field	Notes
Doc Type (Non-QMs)	Select the correct income documentation type (bank statements, DSCR, etc.): 
Estimated Market Rent (DSCRs)	Enter an estimated monthly rent so the engine can calculate the DSCR: 
Citizenship (ITINs)	Select "ITIN" if submitting with our ITIN program:

	
Prepayment Penalty Term (Investment Non-QMs)	Choose “Any” or a specific PPP term: 

Comp Source / Amount	Choose borrower- or lender-paid compensation and enter the amount:	LOAN SCENARIO PRICING DETAILS Product Characteristics Comp Source Borrower Paid Comp % 2.000 Min \$ 0 Max \$ 99,999	
Pricing Term (if locking)	Choose a lock period if you need to request a rate lock:	LOAN SCENARIO PRICING DETAILS Product Characteristics Comp Source Borrower Paid Comp % 2.000 Min \$ 0 Max \$ 99,999 Pricing Term * 30 Days 15 Days 30 Days 45 Days	

Once all scenario fields are complete, hit “Get Pricing” to price the loan:

Loan Officer	Loan Num	Status	Rate Lock Status	Top	Bottom	LTV	CLTV	HCLTV	Rate	Loan Type	Total Loan Amt
Broker Training		Open	Not Locked	21.376%	27.022%	96.500%	96.500%	96.500%	5.625%	FHA	\$579,000.00

1 Validate 1003

2 Select Product

3 Create Loan

4 Credit / AUS

5 Price & Lock

6 Fees

7 Disclosure

8 Submit

LOAN SCENARIO

PRICING DETAILS

GET PRICING

Product Characteristics

Comp Source Borrower Paid	Pricing Term * 30 Days	Lender Fee Buyout? NO
Comp % 2.000 %	Channel Wholesale	
Min \$ 0	Underwriting Result * DU Approve/Eligible	
Max \$ 99,999		



Pricing showing ineligible? Hover over the red “i” icon for the ineligibility reason(s).

5 Price & Lock	6 Fees	7 Disclosure	8 Submit
5.625	6.651	100.078	\$(459)
BluePoint 30 Yr FHA Standard 1/0 Buydown			
5.625	6.651	100.078	\$(459)
BluePoint 30 Yr FHA 0 Down			
BluePoint 30 Yr FHA 0 Down 2/1 Buydown			
Ineligible			
Ineligible			

Exclusion

2ND FINANCING
UP TO 100% CLTV
REQUIRED

Select a rate to register or lock:

Loan Officer

Broker Training

Loan Num

Status

Open

Rate Lock Status

Not Locked

Top

21.384%

Bottom

27.030%

LTV

96.500%

CLTV

96.500%

HCLTV

96.500%

Rate

5.625%

Loan Type

FHA

Total Loan Amt

\$579,000.00

1

Validate 1003

2

Select Product

3

Create Loan

4

Credit / AUS

5

Price & Lock

6

Fees

7

Disclosure

8

Submit

Last Priced: 2026-07-20 16:57:46

Program: BluePoint 30 Yr FHA Standard

Rate: 5.625

Price: 100.203

LOAN SCENARIO

PRICING DETAILS

Loan Information

Non QM *

No

Property Value *

\$ 600,000

Loan Term *

30 Year

Loan Type *

FHA

Loan Amount *

\$ 579,000

Amortization *

Fixed

Doc Type *

Full Doc

LTV *

96.500

%

\$ Subordinate ...

GET PRICING

100 BASE

ZERO BASE

Search rate or price

Pricing Results

Rate	APR	30 Day Price	Rebate / Discount	P&I	DTI
BluePoint 30 Yr FHA Standard					
★ 5.750	6.780	100.156	\$(919)	\$3,438.01	27.243
BluePoint 30 Yr FHA Standard 2/1 Buy					
★ 5.750	6.780	100.156	\$(919)		27.243

Program Name:	BluePoint 30 Yr FHA Standard	
Lock Term:	30 Day	
P&I Payment:	\$3,438.01	
MI Payment:	\$263.83	
Comp Source:	Borrower Paid	
Lender Fee Buyout:	No	
Applied lender credit:	\$919	
DTI:	27.243	

	Rate	Price
Base	5.750	100.156

Adjustments	Rate	Price

	Rate	Price
Final	5.750	100.156

Final Price: The Final Price compares the adjusted price after LLPAs/adjustments and caps at the Max Price allowable per program. LPC (if applicable) is then deducted to calculate the Final Price.

Register / Float

Lock

DISCLOSE AS FLOAT

DISCLOSE AS LOCK

Fees

This step applies SmartFees to the loan for disclosures.

i If you don't wish to use SmartFees, you may upload a fee worksheet or settlement statement later, and request BluePoint to disclose using the worksheet/statement.

Initial Questions

Answer any questions as required by the property state/jurisdiction, then save/continue:

Loan Officer	Loan Num	Status	Rate Lock Status	Top	Bottom	LTV	CLTV	HCLTV	Rate	Loan Type	Total Loan Amt
Broker Training		Registered	Not Locked	21.596%	27.243%	96.500%	96.500%	96.500%	5.750%	FHA	\$579,000.00

1 Validate 1003

2 Select Product

3 Create Loan

4 Credit / AUS

5 Price & Lock

6 Fees

7 Disclosure

8 Submit

1 SmartFees
Create a SmartFees record

2 Fee Validation & Disclosure
Review & update closing costs

? Additional Questions
More details are required to ensure accurate pricing of fees for this loan. Please provide your answers below.

Sellers qualify for partial exemption as blind/disabled/seniors occupying a 1 to 2 family residence *

Transaction qualifies as conveyance of low or moderate income housing *

1. Answer questions

2. Save & Continue

Back

Save & Continue

(Optional) Select Title/Closing Providers and Edit Recording Fees/Transfer Taxes

SmartFees will automatically select title/settlement providers and apply recording fees and transfer taxes. You can optionally choose different providers and edit the recording fees/transfer taxes:

Loan Officer

Broker Training

Loan Num

Status

Registered

Rate Lock Status

Not Locked

Top

21.596%

Bottom

27.243%

LTV

96.500%

CLTV

96.500%

HCLTV

96.500%

Rate

5.750%

Loan Type

FHA

Total Loan Amt

\$579,000.00

1

Validate 1003

2

Select Product

3

Create Loan

4

Credit / AUS

5

Price & Lock

6

Fees

7

Disclosure

8

Submit

Loan Number:

Property Address:

Map 5166-V2

Appraisal Management Company

BluePoint AMC Fees

Details

Remove

Select Provider

Title and Closing Services

Title Insurance

First American Title Insurance Company

Details

Remove

Select Provider

\$2,700.00

Settlement Services

First American Title Insurance Company

Details

Remove

Select Provider

\$929.00

Recording Fees/Transfer Taxes

Edit Recording Fees / Transfer Taxes

Recording Fees Total

Deed

Mortgage / Deed of Trust

Notice of Settlement

\$20.00

Transfer Taxes Total

Edit Split

\$5,185.00

Back

Save & Continue

1. (Optional) Select a different provider

2. (Optional) Edit recording fees / transfer taxes

3. Save & Continue

Add/Edit Other Fees



This step is your opportunity to enter 3rd party processing fees.

Add any other fees (such as a 3rd party processing fee) and edit fees here:

Loan Officer

Broker Training

Loan Num

Status

Registered

Rate Lock Status

Not Locked

Top

21.604%

Bottom

27.251%

LTV

96.500%

CLTV

96.500%

HCLTV

96.500%

Rate

5.750%

Loan Type

FHA

Total Loan Amt

\$579,000.00

1

Validate 1003

2

Select Product

3

Create Loan

4

Credit / AUS

5

Price & Lock

6

Fees

7

Disclosure

8

Submit

1

SmartFees

Create a SmartFees record

2

Fee Validation & Disclosure

Review & update closing costs

Loan Costs

Fee Name	Provider	Details/Term	Cost (\$)
A. ORIGATION CHARGES			
Investor Fee			\$0.00
B. SERVICES YOU CAN'T SHOP FOR			
Credit report			\$100.00
Appraisal Fee			\$1295.00
Appraisal fee	BluePoint AMC Fees		\$900.00
C. SERVICES YOU CAN SHOP FOR			
D. TAXES AND OTHER GOVERNMENT FEES			
Transfer Tax Total			\$0.00
Mortgage recording fee			\$95.00
Recording Fees			\$365.00
E. PREPAID			
		\$201 for 12 mos.	\$2400.00

Add a new fee (ex: 3rd Party Processing)

Edit an existing fee

Select the acknowledgement box at the bottom, then hit “Save & Continue”:

Courier Fee / Overnight / Wire	First American Title Insurance Company	\$39.00	City/Town Tax Adjustment	\$0.00
E-Recording Fee	First American Title Insurance Company	\$50.00	County Tax Adjustment	\$0.00

☒ understand that if I choose to disclose this loan in Bolt, the initial disclosures will be based on the terms and fees above, and I am responsible for any restitution resulting from under-disclosure. **Alternatively**, I may choose to skip disclosures in Bolt and allow BluePoint to reissue disclosures after submission. I may also request that BluePoint disclose the loan based on a fee worksheet or settlement statement that I will upload later.

[< Back](#) [Save & Continue >](#)

i Remember, you are not obligated to disclose with SmartFees. You may ask BluePoint to disclose using your fee worksheet or settlement statement later.

Disclosure

Choose whether to a) skip the disclosure step or b) disclose the loan yourself, then hit “Continue”.



Please skip this step for DSCR loans or if you need BluePoint to disclose using your fee worksheet/settlement statement.

Loan Officer	Loan Num	Status	Rate Lock Status	Top	Bottom	LTV	CLTV	HCLTV	Rate	Loan Type	Total Loan Amt
✓ Broker Training		Registered	Not Locked	24.191%	29.837%	96.500%	96.500%	96.500%	5.750%	FHA	\$579,000.00

1
Validate 1003

2
Select Product

3
Create Loan

4
Credit / AUS

5
Price & Lock

6
Fees

7
Disclosure

8
Submit

Disclosure Method

☒ Skip disclosures; let BluePoint disclose this loan for me
☐ I will disclose this loan in Bolt

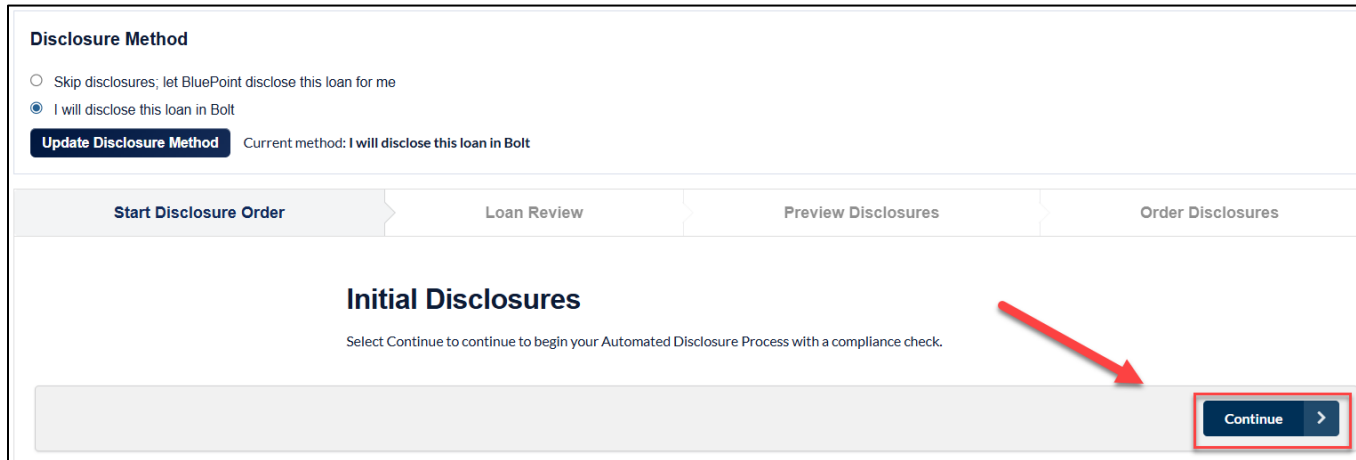
Continue

Please choose a disclosure method to continue.

Select an option
and continue

Start Disclosure

If you choose to disclose in Bolt, move onto the next step:



Disclosure Method

☐ Skip disclosures; let BluePoint disclose this loan for me

☒ I will disclose this loan in Bolt

Update Disclosure Method Current method: I will disclose this loan in Bolt

Start Disclosure Order | Loan Review | Preview Disclosures | Order Disclosures

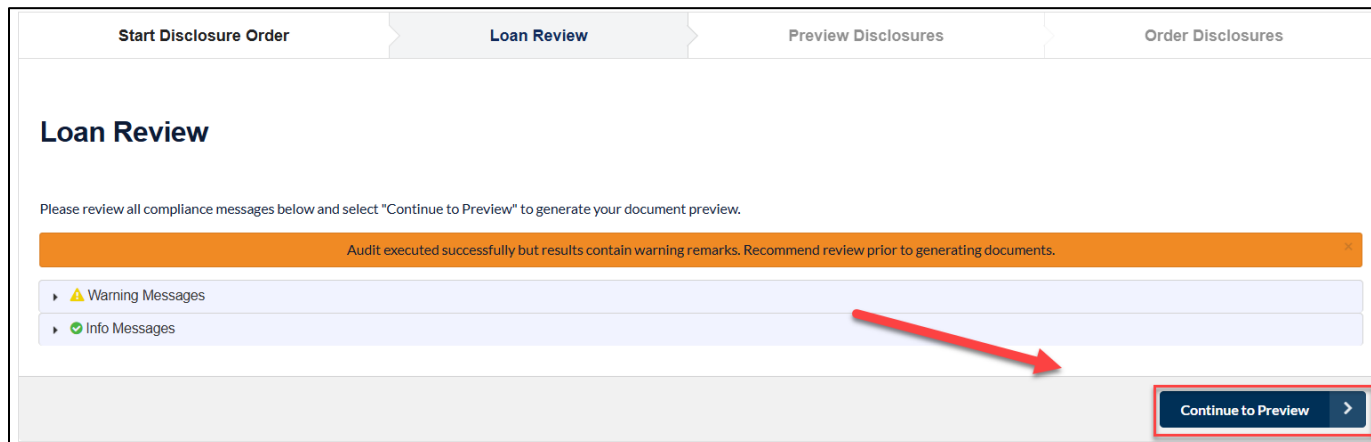
Initial Disclosures

Select Continue to continue to begin your Automated Disclosure Process with a compliance check.

Continue >

Loan Review

The loan will go through a data audit. If no fatal errors appear, proceed to the next step:



Start Disclosure Order | **Loan Review** | Preview Disclosures | Order Disclosures

Loan Review

Please review all compliance messages below and select "Continue to Preview" to generate your document preview.

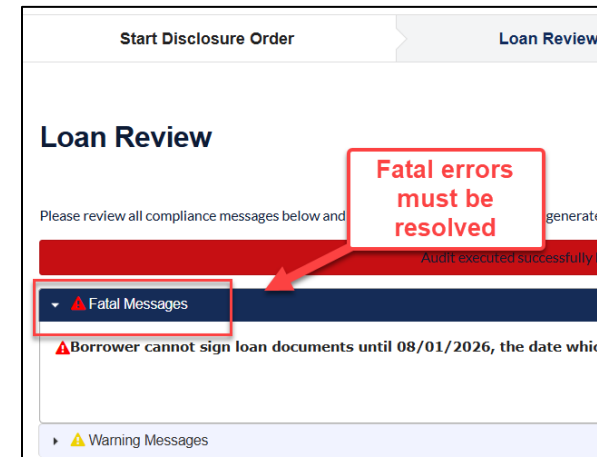
Audit executed successfully but results contain warning remarks. Recommend review prior to generating documents.

Warning Messages

Info Messages

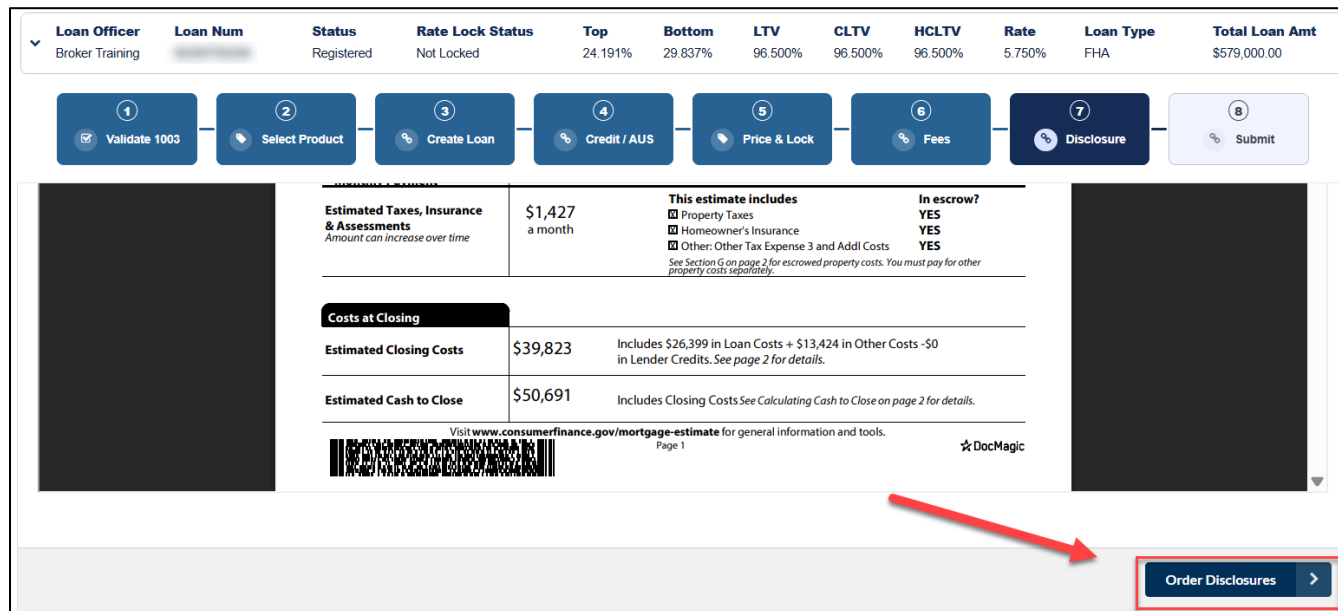
Continue to Preview >

If the audit produced a fatal error, please resolve it before proceeding. Contact us if you need assistance.



Preview Disclosures

Preview the Loan Estimate and the disclosure package for accuracy. If all looks good, hit “Order Disclosures” to complete the order and send the initials for e-signing:



Loan Officer	Loan Num	Status	Rate Lock Status	Top	Bottom	LTV	CLTV	HCLTV	Rate	Loan Type	Total Loan Amt
Broker Training		Registered	Not Locked	24.191%	29.837%	96.500%	96.500%	96.500%	5.750%	FHA	\$579,000.00

Estimated Taxes, Insurance & Assessments <i>Amount can increase over time</i>	\$1,427 a month	This estimate includes ☒ Property Taxes ☒ Homeowner's Insurance ☒ Other: Other Tax Expense 3 and Addl Costs See Section G on page 2 for escrowed property costs. You must pay for other property costs separately.	In escrow? YES YES YES
Costs at Closing			
Estimated Closing Costs	\$39,823	Includes \$26,399 in Loan Costs + \$13,424 in Other Costs -\$0 in Lender Credits. See page 2 for details.	
Estimated Cash to Close	\$50,691	Includes Closing Costs See Calculating Cash to Close on page 2 for details.	

Visit www.consumerfinance.gov/mortgage-estimate for general information and tools.
Page 1

★ DocMagic

Order Disclosures >

Submit

Add any 3rd party contacts to the loan (title, escrow, etc.), then hit “Submit”:

Loan Officer

Broker Training

Loan Num

Status

Registered

Rate Lock Status

Not Locked

Top

24.191%

Bottom

29.837%

LTV

96.500%

CLTV

96.500%

HCLTV

96.500%

Rate

5.750%

Loan Type

FHA

Total Loan Amt

\$579,000.00

1

Validate 1003

2

Select Product

3

Create Loan

4

Credit / AUS

5

Price & Lock

6

Fees

7

Disclosure

8

Submit

Loan Submission

Save

Submit

1. Add 3rd party contacts

Contacts for this loan:

3rd Party Processor

+

Select Provider

Title Company

+

Select Provider

Escrow / Closing Company

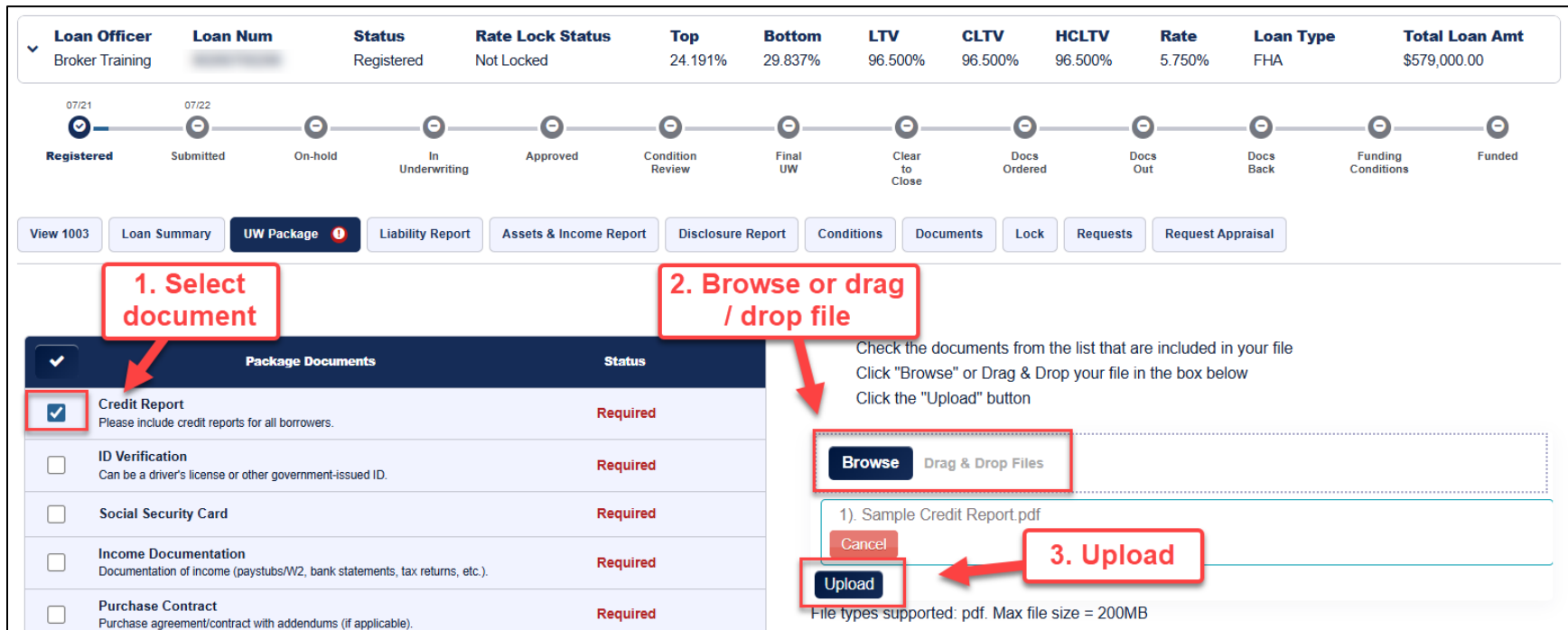
+

Select Provider

2. Submit

Upload Docs

Upload the loan submission documents shown on the UW Package tab. Some documents are required and others are optional:



The screenshot displays the BluePoint Mortgage loan submission interface. At the top, a header bar shows loan details: Loan Officer (Broker Training), Loan Num (redacted), Status (Registered), Rate Lock Status (Not Locked), Top (24.191%), Bottom (29.837%), LTV (96.500%), CLTV (96.500%), HCLTV (96.500%), Rate (5.750%), Loan Type (FHA), and Total Loan Amt (\$579,000.00). Below this is a progress timeline with stages: Registered (07/21), Submitted (07/22), On-hold, In Underwriting, Approved, Condition Review, Final UW, Clear to Close, Docs Ordered, Docs Out, Docs Back, Funding Conditions, and Funded. A navigation bar includes tabs: View 1003, Loan Summary, UW Package (active), Liability Report, Assets & Income Report, Disclosure Report, Conditions, Documents, Lock, Requests, and Request Appraisal. The main content area shows the 'Package Documents' table with a list of required documents and an upload interface.

Package Documents	Status
☒ Credit Report Please include credit reports for all borrowers.	Required
☐ ID Verification Can be a driver's license or other government-issued ID.	Required
☐ Social Security Card	Required
☐ Income Documentation Documentation of income (paystubs/W2, bank statements, tax returns, etc.).	Required
☐ Purchase Contract Purchase agreement/contract with addendums (if applicable).	Required

Instructions for document upload:

- 1. Select document**: Check the documents from the list that are included in your file. Click "Browse" or Drag & Drop your file in the box below. Click the "Upload" button.
- 2. Browse or drag / drop file**: The upload interface includes a "Browse" button, a "Drag & Drop Files" area, and a list of files (e.g., "1). Sample Credit Report.pdf").
- 3. Upload**: Click the "Upload" button to submit the selected documents.

File types supported: pdf. Max file size = 200MB

Request Document Check

Once all required documents have been uploaded, hit “Request Document Check” to complete the loan submission:

Loan Officer

Broker Training

Loan Num

90260700299

Status

Pre-Processing

Rate Lock Status

Not Locked

Top

24.191%

Bottom

29.837%

LTV

96.500%

CLTV

96.500%

HCLTV

96.500%

Rate

5.750%

Loan Type

FHA

Total Loan Amt

\$579,000.00

07/20

07/22

Registered

Submitted

On-hold

In Underwriting

Approved

Condition Review

Final UW

Clear to Close

Docs Ordered

Docs Out

Docs Back

Funding Conditions

Funded

View 1003

Loan Summary

UW Package

Liability Report

Assets & Income Report

Disclosure Report

Conditions

Documents

Lock

Requests

Request Appraisal

This loan is ready to request Document Check

Request Document Check

Package Documents

Status

☐

Credit Report

Please include credit reports for all borrowers.

☐

ID Verification

Can be a driver's license or other government-issued ID.

☐

Social Security Card

✓

✓

✓

Check the documents from the list that are included in your file

Click "Browse" or Drag & Drop your file in the box below

Click the "Upload" button

Browse

Drag & Drop Files

Upload

File types supported: pdf. Max file size = 200MB



Non-DSCR loans: If you did not disclose the loan, remember to upload a fee worksheet or settlement statement if you need us to disclose specific fees.

What's Next?

BluePoint's Setup team will review the submission and:

- Run AUS, if it wasn't already submitted to one
- Disclose, if the loan hasn't been disclosed yet
- Advise if we need anything else
- Queue the loan for underwriting

Questions?

Please contact your Account Executive if you have any questions about submitting a loan.