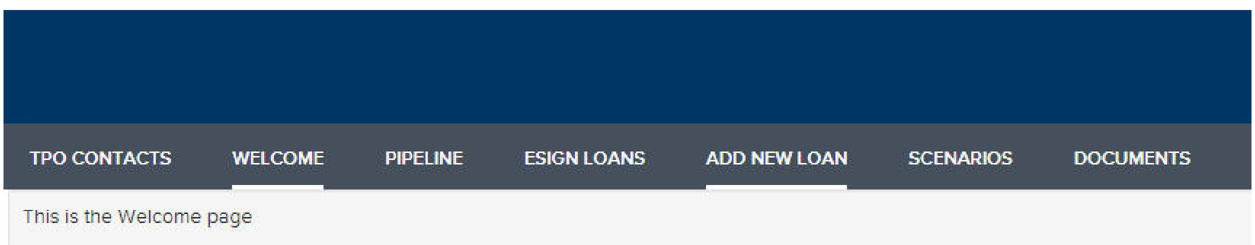
Tax ID Max -SMC -12 Months Bank Statements Submissions Steps

The Underwriting team will be responsible for calculating the income, please follow the steps listed below.

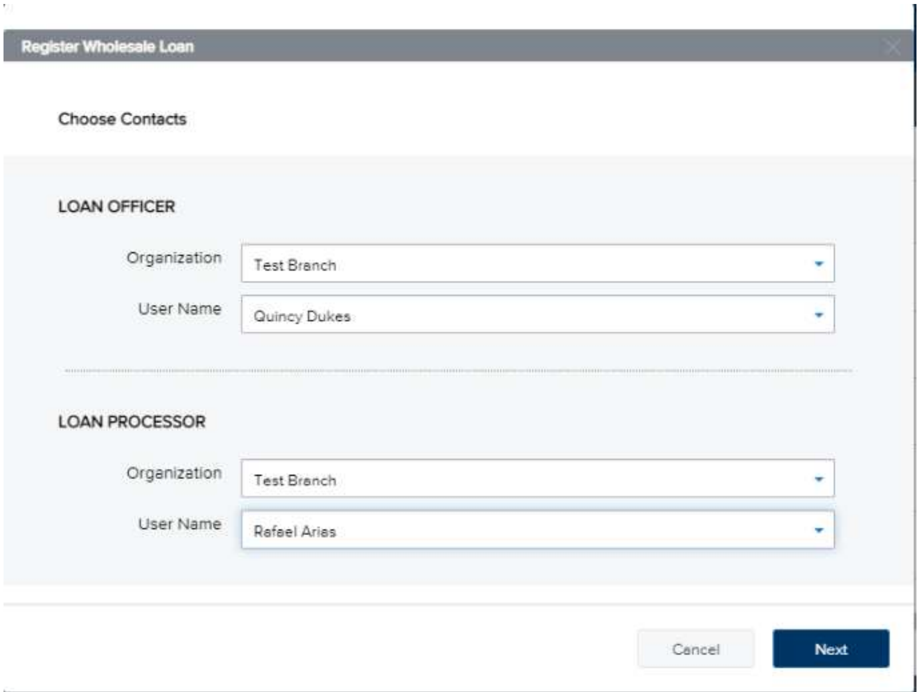
1. Create a loan on the TPO portal.
2. Upload to the file the following documentation
    a. Bank Statement Program - Borrower Business Narrative Submission form
    b. 12 months bank statement
3. Go to the Help desk/ Worksheets/ Forms
4. Submit a ticket through the help desk.
5. Please send an email to scenario desk email letting them know the ticket for the loan is submitted scenario@beinmortgage.com

Creating a new Loan

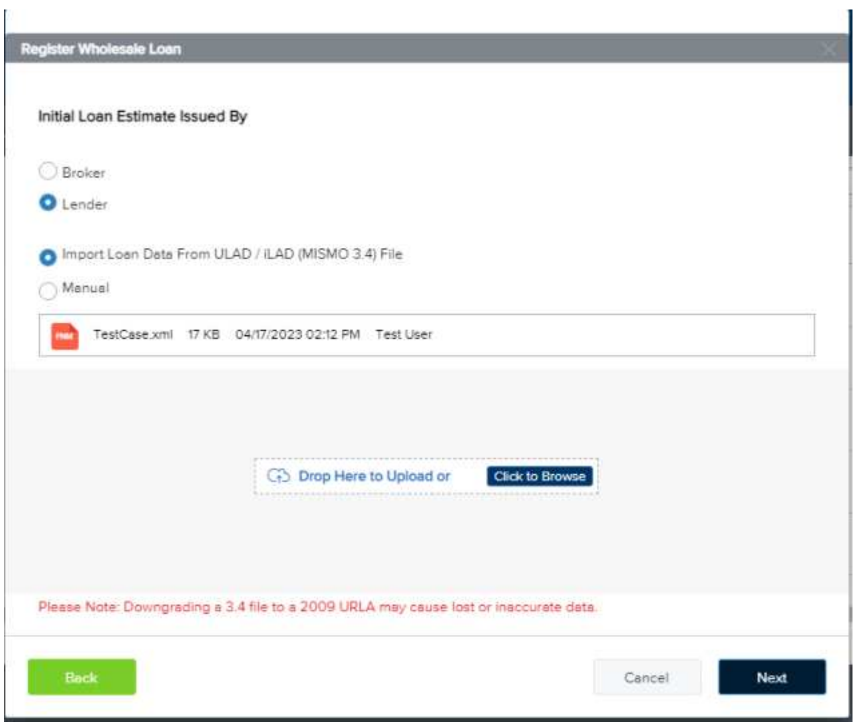
After signing in into your TPO user select the option "Add New Loan"



A new window will pop up to choose the Loan Officer and Loan Processor after finishing click on next to continue with the process.



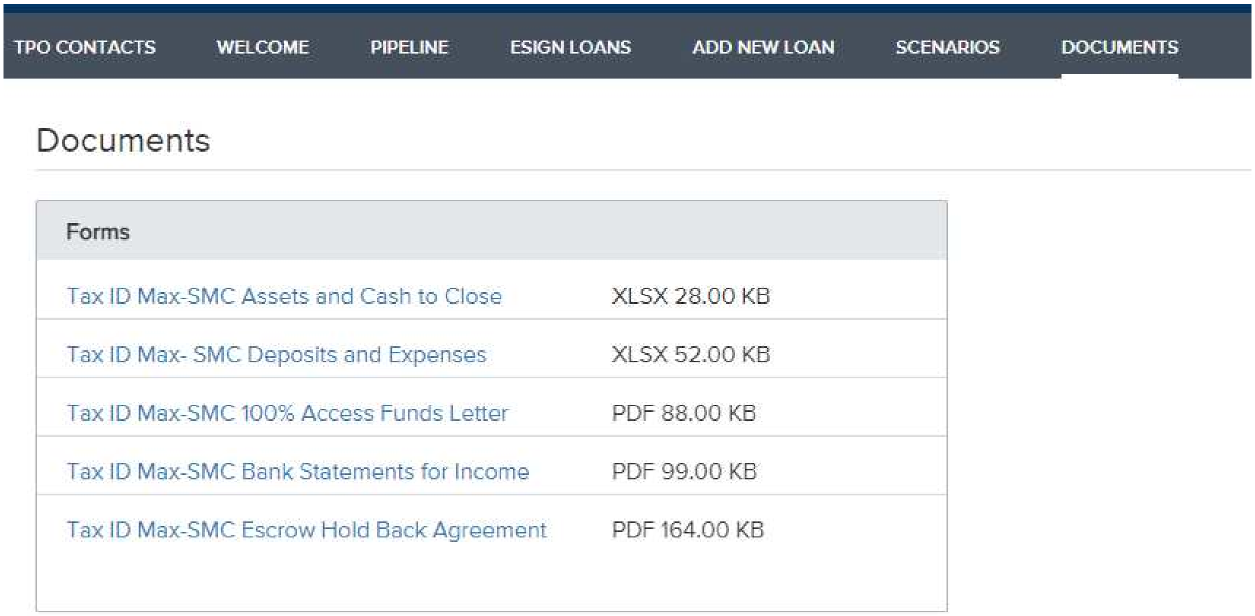
Another window one more time will open requesting information as the "Initial Loan Estimate Issued by." And how is the file going to start "importing your Mismo 3.4 File" or manually, please keep in mind that if the user is using a mismo 3.4 file must click on "Click to browse" to attach the file and once you finished click on "Next."



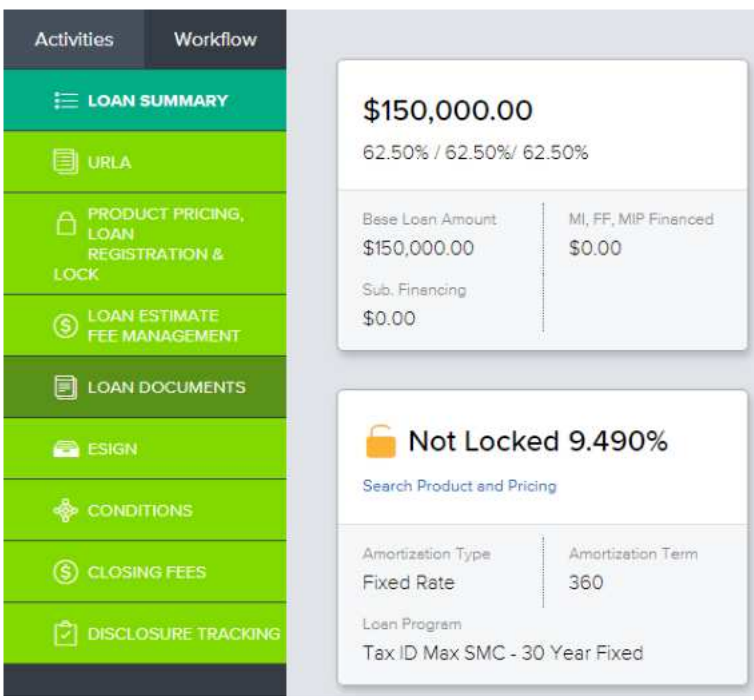
The file will open with all the imported information in case the user has used a 3.4 mismo in case the user has selected manually the form will open to complete the required information.

Uploading Documentation

Under the option "Documents" user will be able to find all the Tax Max ID Documentation.



On your Activities Left Panel select the option "Loan Documents"

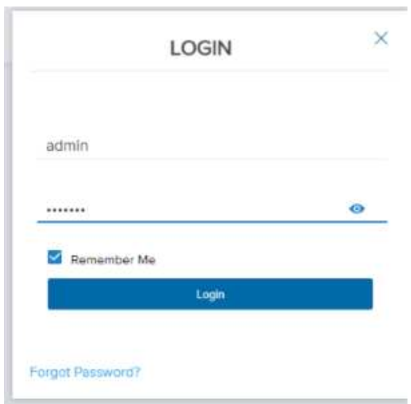


Be In Mortgage

Helpdesk

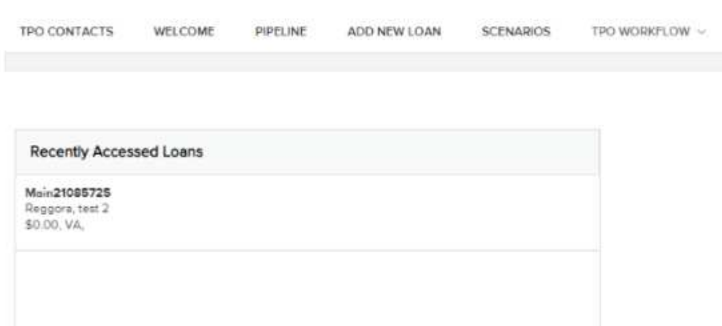
To start using this tool, log in through the TPO control panel.

After that we log in with the correct user and password for this action.

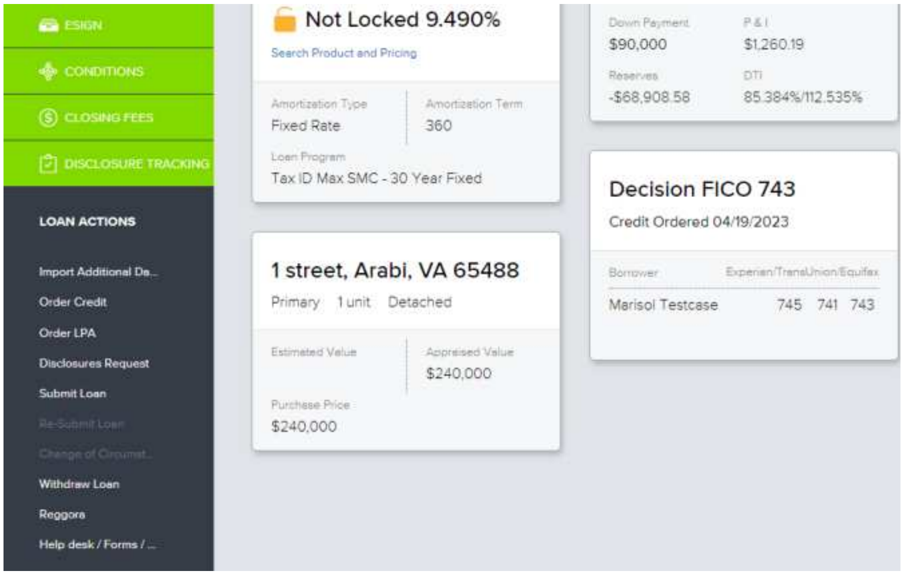


Enter the main page of the TPO control panel and select a user.

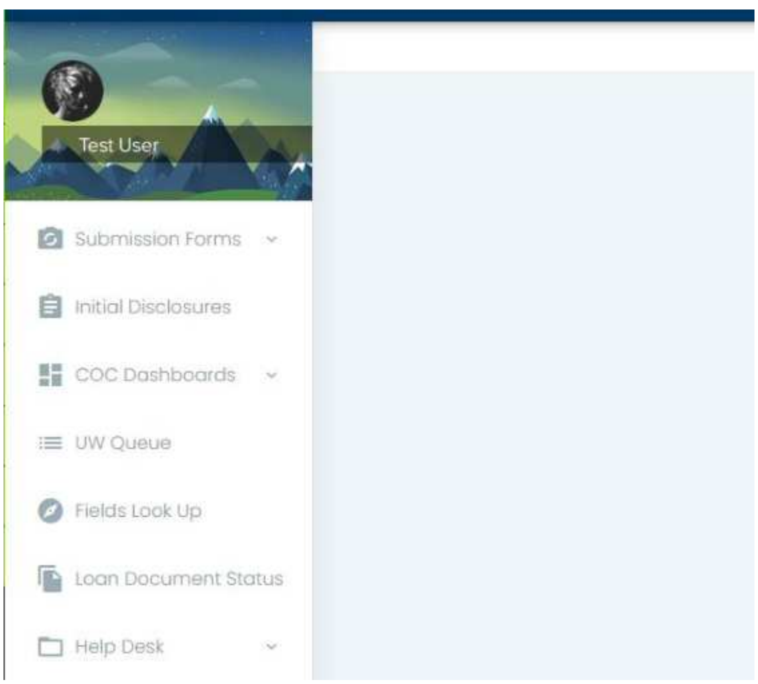
Select an available loan.



Next, the user will be redirected to the control panel where the helpdesk option can be selected in the lower left corner. See image below.



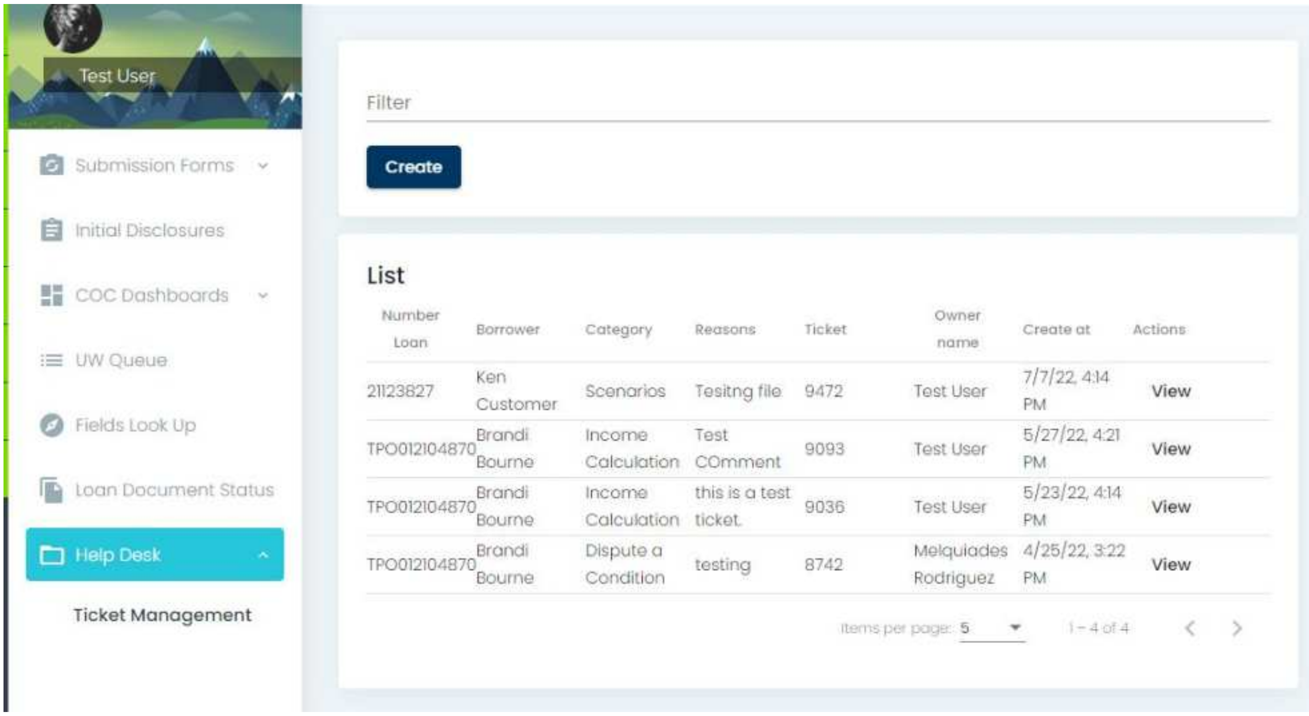
The "Help Desk" control panel home page will appear.



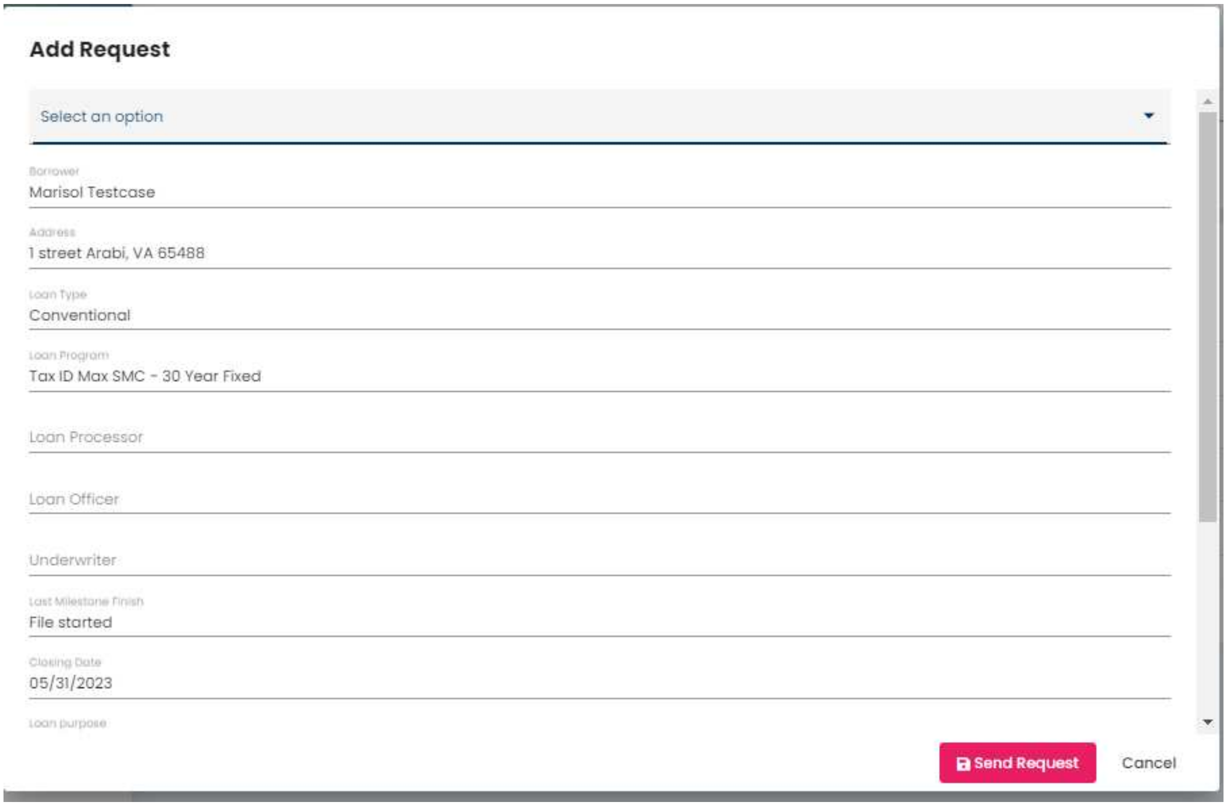
Select the option needed to display the loan information in the form.

Ticket Management

In the view "Ticket management" the requests made in the past are listed. The columns displayed are loan number, borrower, why (reason), ticket (number), owner name, created at and actions. All columns can be sorted in ascending and descending order, and users can also filter the rows by typing in the "Filter" field.



To make a request, click on the blue "Create" button Tab (1). Then, it displays a box with a form with the following fields:



- Loan Number, Borrower*
- Address*
- Loan Type*
- Loan Program*
- Loan Processor*
- Loan Officer*
- Underwriter*
- Last Milestone Finish