



HERO Broker Portal Training:

TBD to Approval



TBD to Approval

Pipeline



Step 1:

From your pipeline, please click the TBD icon.

Return to Dashboard Pipeline

Reset Pipeline Filters Print Export

Loan Open x Registered x Submitted x In Underwriting x Pre-Approved x Approved x Condition Review x Final Underwriting x Clear To Close x

Docs Ordered x Docs Out x Docs Back x Funding Conditions x Funded x Exception x

Loan #	Borrower	Program	Note Amt	Status	Status Date	TBD	Lock	Lock Exp	Options
<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>		
12024050576	Sanches, Lisa	Activator	\$888,630	Registered	05/20/2024				
12024050267	Bailus, Connie	Ally	\$450,000	Condition Review	05/20/2024				

Showing records 1-2 of 2

Contact Support

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Pipeline Cont.



Step 2:

You will then be asked to plug in the property address and go from there. Snippets below of the process.

Please reach out to Scenarios@ChampsTPO.com if you run into any issues.

The screenshot shows a loan dashboard interface. At the top, there is a navigation bar with tabs: Conditions, Product & Pricing, Loan Dashboard (active), Important Dates, DocBox, and 1003. Below the navigation bar is a progress bar with steps: 1. Not Submitted, 2. Submitted (current step), 3. Approved, 4. Condition Review, 5. Clear to Close, 6. Docs, 7. Funded. Below the progress bar, there is a summary row with fields: Loan #: 12024030723, Program: CACT 30 YR FIXED, Borr: America, Ln Amt: \$250,400, LTV/CLTV: 59.6%/59.6%, DTI: 0.00/22.35, and Status: In Underwriting. Below this is a 'Loan Dashboard' section with a 'Return to Pipeline' button. The 'Primary Borrower' section includes fields for Name (Arzly), America, SSN (999 80 1333), Citizenship (US Citizen), and FICO (677). The 'Co-Borrower' section includes fields for Name (Arny), America, SSN (900 40 2222), and Citizenship (US Citizen). The 'Loan Information' section includes fields for Total Income (\$12,400.00), Property Type (Condo), Loan Amount (\$250,400), Property Value (\$420,000.00), Credit Seasoning (N/A), Housing Event (N/A), Doc Type (1099), and Purchase Price (\$420,000.00). The 'Property Information' section includes a checkbox for 'TBD Property Address', a 'Convert to App' button, and fields for Address (TBD), City (1), State (CA), Zip (90006), and Country (LOS ANGELES). At the bottom, there are labels for 'AE' and 'UW'.

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Property Address



Step 3:

It requires broker to enter the property address and the app date (please use today for app date).

Convert to App

Address:

Please enter.

Santa Ana CA 90026

County: LOS ANGELES

Application Date: 04/16/2024

Save Cancel

TBD to Approval

Full Application



Step 4:

You will then they see this:

You'll need to click to Send Initial Disclosures on that popup. If you don't send disclosures the same day, the loan will be reverted to a TBD loan with the property address removed over night.

This loan is a full application now.

Please be sure to [send initial disclosures](#) today to keep this converted application, and upload the required documentation on the [Conditions](#) page.

Send Initial Disclosures

Upload Documentation