

Blueprint for Brokers

User Guide



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The Blueprint for Brokers Portal is an exclusive platform that makes it even easier to do business with Newrez. This training manual will provide details on what you can expect to see.

Benefits of using the Blueprint for Brokers Portal include:

- Increased Productivity
- Streamlined processes to boost efficiency
- An overall improved broker experience

Logging In

To access the Blueprint for Brokers Portal go to <u>blueprint.newrezwholesale.com</u> and enter your Newrez credentials.

	Broker Portal	
	Sign In	
	Next	
	Have Questions? You can reach out to support at 1-888-426-7026 option 7.	
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Dashboard

The Dashboard is the landing page for the Blueprint for Brokers Portal, and it has been designed to keep you informed on the latest information available while allowing you to be as efficient as possible.

Action Tabs

Identify loans that have items to review, loans with upcoming deadlines, and loans with outstanding conditions that need to be resolved. Loan Analytics

Displays the loans that have closed, are in underwriting, and that have funded MTD. Provides contact information to your Account Executive (AE), direct manager, and support team members.

Newrez Team

Turn Time

Current turn times for Loan Registration, Underwriting, Conditions, Initial CD, and Closing Docs for your Ops center.

ashboard y Pipeline reate New Loan	Welcome Back, Deep We need your help with 365 items.	a Mohandas					blueprin
roduct & Pricing	350 Items to Review	1 Upcoming	g Deadlines	14 Loans with Outstanding Cond			Month to Date
ate Sheet	Loan Number	Borrower ¢	Required Actions ©	Lock Status			
raining	9795674762	Builder, Suzi	Run AUS	-		7	52
lanage Team	Purchase (Caliber)	Centennial,CD	±1.more			Closed	In Underwriting
esources 👻	9744772097	Kelli, TestingIns	Run AUS	4			
Suidelines and	Purchase (Caliber)	FLOWER MOUND,TX	±2.more		5	728K	N/A
orms	9759898068	test smith, christine	Run AUS	-		Funded	Company Ranking
Self-Employed ncome Request	Purchase (Caliber)	BALEV,NC	±2.mpre				company manning
Marketplace	9708583043	Builder, Suzi	Run AUS	-			
Marketplace	Purchase (Caliber)	WASHINGTON, DC	±.2.more			\sim	
	9714121838	Testing, Buydown RLOWER MOUND,TX	Run AUS		Congra		dents Club status!
	Purchase (Caliber) 9798499993		+ 2.more Run AUS		Congra		uents club status:
	Purchase (Cellber)	borrowertest, exisiting washington.bc	±2 more	-		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	
	9714252443	borrowertest, Reflexistig	Run AUS		Newrez Team		
	Refinance (Caliber)	ROSEBURG.OR	±2.more	-	Newrez ream		
	9774116363	Testingemp. Kelliemp	Run AUS			lli Carr Account Executive	TAKC
	Purchase (Celiber)	RLOWER MOUND TX	+ 2 more	-	Test Account Exe	icutive	TAKL
					(000) 000-0000 greesh.periyadi	caliberhomeloans.com	
		ople achieve and realize the benefits of ho			Christopher Elm VP National Ope (000) 000-000 Christopher Elm Shelly McDouga	rations endorf.CaliberBlackHawkUAT1.ch	
		ers are the most rewarding through the im- your borrowers with unique programs th			VP National Ope (801) 438-7624	d@caliberhomeloans.com	
	Turn Times			View: Bus	iness Days 🗸		
	Loan Registration	Underwriting	Conditions	Initial CD C	losing Docs		
	Purchase	Business Days Refinance	Business Day	s			
	Non-QM Conventional FHA VA USDA Jumbo	2 Non-QM 2 Conventional 2 Sprint 2 FHA 2 VA 2 USDA		2			

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Actions Tabs break down where your attention is needed to move loans forward.

🗩 Items to Review

Run AUS: Loans that need AUS to be run.

Create Newrez LE: Wholesale loans where the Newrez LE has not yet been created.

Send Newrez LE: Wholesale loans where the Newrez LE has been created but not yet sent to the borrowers.

Borrower to eSign LE: Wholesale loans where the LE has been sent but we have not received the signature from all applicable parties. **Submit Loan**: Wholesale loans where AUS has been run and the LE sent but the loan has not yet been submitted.

CL1 loans where AUS has been run but the loan has not yet been submitted.

Lock Loan: Wholesale and CL1 loans where the loan has not yet been locked.

Order Appraisal: Wholesale loans where an appraisal is required but has not yet been ordered.

Appraisal Payment:

Wholesale loans where and appraisal has been ordered but the payment has not yet been received.

Appraisal Order needs attention: Wholesale loans where an appraisal has been ordered and payment has been received but it requires the brokers attention for any reason.

Review Active Alerts/Stops:

Wholesale loans that have any active alerts or stops that require attention.

Order CD: Wholesale or Non-Delegated Cl1 loan where the CD closing collaboration has started but the loan requires attention for successfully ordering the initial CD.

Borrower Receipt of CD confirmed: Wholesale or Non-Delegated CL1 loans where a CD has been sent but not yet opened by all applicable parties.

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Upcoming Deadlines

Lock Expiration: A loan where the lock expires in the next 7 days and is likely to expire prior to the loan funding.

Credit Doc Expiration: A loan where the current

underwriting credit approval expires in the next 7 days and is likely to expire prior to the loan funding. **Upcoming Closing:** Loans that have not yet funded and the estimated closing date is within the next 7 days.



Outstanding Conditions

Review and Upload Conditions: Wholesale loans with their first set of conditions.

New Conditions Added: Wholesale loans with new conditions added to them.

Additional Information Needed: Wholesale loans with updates made to existing conditions.

Upload Conditions for Purchase: CL1 loans that are suspended and require conditions for purchase.

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 Training Manage Team Resources Guidelines and Forms Self-Employed income Request Marketplace 	Affordable Let Our shared purpose is to hi Some of the most underser Learn more about how you and Freddie Mac. Learn More PRICE A	elp more people achie ved customers are the can support your bor	e most rewarding thre	between Busine	opdown to tog ess Days and C iew Date.	
	an Registration	Underv	vriting	Conditions	Initial CD	Closing Docs
Purchase		Business Days	Refinance	Busines	ss Days	
Non-QM Conventiona	ıl	2	Non-QM Conventional		2	
FHA VA USDA		2 2 2	Sprint FHA VA		2 2 2	
Jumbo		2	USDA Iumbo		2	

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My Pipeline

The **My Pipeline** tab is a robust, customizable, all-encompassing way to view and manage your pipeline effectively. It can be accessed by clicking on **My Pipeline** from the Navigation Menu.

Action Items	All Loans	Expiring Locks
Displays loans that need attention.	Displays all active, non-funded loans.	Default display shows any active loan with a lock that is expiring in the next 7 days.
Pending Submission	Upcoming Closings	Funded

🖍 newrez								
Dashboard	My Pip							
My Pipeline		All Loans (109)	Expiring Locks (13)	Pending Submission	ns (102) Upcom	ing Closings (9)	Purchase Suspense (1)	Funded (0)
· Wy ripeline							🗌 Default Tab 🔳 Column	Options 🝸 Filte
Create New Loan		Borrower 🗢	Loan Purpose 🗘	Property Address 🗢	Property City 🗢	Property State 🗢	Required Actions 🗘	Loan Sta
🖬 Product & Pricing	All active,	America, Andy Plano, TX	Purchase	3000 Edwards Dr	Plano	ТХ	Order Appraisal	Condition
Rate Sheet		Builder, Suzi	Purchase	128 Maple St	FRISCO	TX	Run AUS + 2 more	Created
	Loan	Builder, Suzi	Purchase	128 Maple St	FRISCO	TX	Run AUS + 2 more	Created
Training	3491	MyLastName, MyFirstName	Purchase			ТХ	Run AUS	Created
Purchase 4645046	640	TX Customer, Ken					* 2 more © Run AUS	•
Purchase	049	Burbank, CA	Purchase	10655 Birch St	Burbank	CA	+ 2 more	Created
1959205 Purchase	537	KBwcoYzQbp, fbYMqexsTS	Purchase			ТХ	Run AUS + 2 more	Created
6110936 Purchase	131	America, Andy	Purchase			ТХ	Run AUS t 2 more	Created
2900315 Purchase	746	Customer, Ken Burbank, CA	Purchase	TBD	Burbank	CA	Run AUS 2 more	Created
1031043 Purchase	362	Customer, Ken Burbank, CA	Purchase	10655 Birch St	Burbank	CA	Run AUS	Created
	306	eQzSSofili, SErBzlvGep					* 2 more © Run AUS	Created

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My Pipeline, cont.

🔨 newrez				AllRegs Contact Us	- 🖵 Begin Live Ch	at Q Search by loan number	or last name	
Dashboard	My Pipeline							
🗮 My Pipeline		Expiring Locks (13)	Upcom	ing Closings (9)	Purchas	se Suspense (1)	Funded	1 (0)
Create New Loan	Action Items (105)		1			🛛 Default Tab 🔳 Colu	mn Options 🛛	Filters
Product & Pricing	All Action Items (105) 👻	.oan Amount 🗢	 ng Deadlines 🗘	Deadline Date	÷	# of Outstanding Cor	nditions 🖨	Es
Rate Sheet	Loan Number	ionforming Fixed 30 Borro 100,000				Updates To Existing Co	onditions	07
🛝 Training	3491783	ionforming Fixed 30 2-1 Buyd	own <u>+ 2 more</u> © Run AUS	_		_		
Resources 🗸 🗸	Purchase	Plano, Tonforming Fixed 30 2-1 Buyd	own +2 more	-	-	-		0
Purchas		\$0	© Run Aus + 2 more	Options allo	w you to	o set as a def	ault	-
	e dropdown for	\$300,000	Run Al ± 2 more	tab, add/ren	nove col	lumns, filter,	and	-
	ditional filter	\$0	Run Al <u>+ 2 more</u>	ex	kport to	excel.		_
	options.	\$0 Conforming High Balance Fixed 0 Buydown	• Run AU-	-	-			-
290031 Purchas		\$300,000 Conforming Texas A6 Fixed 10	Run AUS + 2 more	-	-	-		10
103104 Purchas		\$300,000	Run AUS the second se	_	_	_		-
375855 Purchas		\$0	Run AUS + 2 more	_	_	_		_

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Create New Loan

The **Create New Loan** tab has redesigned the process to allow for an intuitive step by step flow for creating new loans.

Step	
1 Click Create New Loan	 Can create a loan on behalf of another originator, who has shared their pipeline with you, using the Originator dropdown.
	 Can enter up to 6 names as Additional Contacts. These individuals will receive Loan Status Notifications for these loans

🖍 newrez	AllRegs Contact Us	DMJ
Dashboard	Create New Loan Next	
🗮 My Pipeline		
• Create New Loan	Loan Creation Options	
Product & Pricing	Originator Loan Channel	
🖽 Rate Sheet	Joe Jones, Deepa Mohandas 🗸 🔍 Wholesale 🔿 CL1	
🐘 Training	Additional Contacts to Receive Notifications	
🚢 Manage Team	First Name Last Name Phone Email	
🖺 Resources 🔹 💙	Q Add Contact	
Guidelines and Forms		
Self-Employed Income Request		

as well.

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	Step			
2 Select Imp Input, or C Loan	oort file, Manual opy from Existing		l 3.2 or MISMO 3.4 u can browse or Dra	ag & Drop.
	AllRegs eate New Loan	Contact Us • 💭 Begin Live Chat	an number or last name Previous Next	
🗟 Product & Pricing	03 Creation Method este Loan By mport File Manual Input Copy From Existing Loan			
Manage Team Resources Guidelines and Forms Self-Employed Income Request Marketplace	Supp	Drag & Drop Files Here orted File Types: :fnm & MISMO 3.4 file Browse		Create New Loan
		 Create New Loan Product & Pricing Rate Sheet Training 		1003 Creation Method Create Loan By Import File
My Pipeline	Create New Loan	IlRegs Contact Us • 💭 Begin Live Chat	arch by loan number or last name Previous Next	Loan Number 0123456789 10-digit number Borrower SSN ###.##.#### Search For Loan
Rate Sheet Training Manage Team	Create Loandy' Fig. Manual Input First Name Last Name Last Name	SSN or ITIN [®]	select grid wi	ying a loan using SSN, a ill appear allowing you to ct the specific loan you want to copy from.

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Step

3 Select Loan Type & Loan Product (optional)

- Dropdowns will show all loan types and products.
- **Recent Product** will show the 5 most recently used products.



4 Upload Submission Package (optional)



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Step

5 Select Duplicate Loan (if ■ applicable) and/or click Continue with New Loan.

Duplicate loan search only applies when borrower with same name and SSN has an existing loan in your brokerage.

newrez			AllRegs	Contact Us 👻 🖵 Begin I	Live Chat	earch by loan number or last r	name	
Dashboard	Create New Lo	an				Previous Continue W	ith New Lo	ban
My Pipeline	_							
• Create New Loan	5 Duplicate Loa	ans Found					_	
Product & Pricing		exist when the borrower				Alice Firs	Borrower timer	
Rate Sheet	You can continue	with this new loan or w	ork in an existing on	e below.				
I Training	Loan Number	Primary Borrower	Loan Stage	Originator	Creation Date	Address	Unit	Cit
Manage Team	9701463433	Alice, Firstimer	Created	Joe Jones, Siddhartha Roy	09/16/2022	1322 Elmdale Ave		BE
Resources 🗸	9704137034	Alice, Firstimer	Created	Joe Jones, Siddhartha Roy	09/16/2022	1525 South Belt Line Rd.	1235	СС
Guidelines and	9705499219	Alice, Firstimer	Created	Joe Jones, Siddhartha Roy	09/16/2022	1322 Elmdale Ave		BE
Forms	9706727584	Alice, Firstimer	Created	Joe Jones, Siddhartha Roy	09/16/2022	1322 Elmdale Ave		BE
Self-Employed								
Self-Employed Income Request	9707319480	Alice, Firstimer	UW Submitted	Joe Jones, Deepa Mohandas	09/13/2022	344 dt	121	QL

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Step

6 Complete Application Tracker (if applicable)

- Select applicable Property Address radio button indicating if your borrower has identified a property address or if the loan is a TBD.
- Enter **Application Date** and Confirm all **6 Key Points of Data** have been received.

🖍 newrez	AllRegs Contact Us Q Search by loan number or last name	DMJJ
Dashboard	Create New Loan Previous Confirm	
🗮 My Pipeline		
Create New Loan	Application Tracker Primary Borrower Alice Firstimer	
Product & Pricing	6 of 6 Key Points of Data	
Rate Sheet	Borrower Name Ville Firstimer	
🚻 Training	SSN / ITIN / PassportID 🗸 XXX-XX-9991	
🖀 Manage Team	Gross Monthly Income 💙 \$40,262.30	
🖹 Resources 🗸 👻	Appraised Value 💙 \$400,000	
Guidelines and Forms	Loan Amount \$ \$320,000 Subject Property Address \$ 3516 Beverly Dr, Dallas, TX 75205-2802, Dallas	
Self-Employed Income Request	Property address was one of the points of data added to the loan. Please confirm one of the following: O This is a TBD and the borrower has not identified a property address for this transaction The borrower has identified a property address for this transaction	
	You have entered all 6 Key Points of Data in the loan record. Your Loan Estimate will need to be delivered within 3 business days of 09/20/2022. Application Date	
	09/20/2022	

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ISING I	2022 Newrez LLC, 1100 Virginia Dr., Ste. 125, Fort Washington, PA 19034. 1-888- 573-5521. NMLS #3013 (www.nmlsconsumeraccess.org). For real estate and mortgage professionals only and not intended for distribution to consumers or other third parties.	Blueprint for Brokers User Guide	Page 1 5
		·	



Step

7 New Loan Has Been Created

- Move forward with loan from What would you like to do next? section.
- Each link will navigate you to that specific area for your loan.



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Product & Pricing

The **Product & Pricing** tab provides a streamlined and more robust pricing and eligibility tool with dynamic fields based on inputs. It will allow you to easily **Lock**, **Assign**, **and Compare** products & rates and can be accessed by clicking on **Product & Pricing** from the Navigation Menu.

Within this section, find steps on how to:

- Lock a Loan
- <u>Assign a Rate/Product</u>
- <u>Compare Products</u>

🖍 newrez			AllRegs Contact Us 🔻	및 Begin Live Chat	Q Search by loan number or	last name	
Dashboard	Produ						
🗮 My Pipeline	. Pricing Prodi					1 Upload 3.2/3.4	Search
Create New Loan						Clear	r All Fields
Product & Pricin	search Scenario						
🖪 Rate Sheet	Apply						
🕅 Training	Scenari	✓ Save Scenario	Manage Scenarios				
🚢 Manage Team	Selec		Users car	n now se	earch for		
Forms	Loan Type*		more than	one Loa	n Type in		
Self-Employed Income Request	Select	~		gle sear			
Ø Marketplace				grooodi			
	Loan Features	Lien Position	Document Type*				
	Purchase	 ✓ 0 1st ○ 2nd 	Full		Existing Servicing Bor	rower	
	Loan Type * Conventional FHA VA USDA/Rural Housing Additional Search Criteria *	25 Year 20 Year 15 Year 10 Year		No Buy		•	
	Conforming			1			
	Non-Conforming/Jumbo	Sales Contract P			can be found		
	Non-QM	\$0			l" Loan Type	S	
	Base Loan Amount [®] \$0	Subordinate Fin. Yes No	have	been se	lected.		
<u>Go to ta</u>	ible of conte	<u>nts</u>					
wrez LLC, 11	00 Virginia Dr., Ste		-	88-			
			1 I I I I I I	1			
NMLS #3013	ls only and not inte	0		B	lueprint for Broke	ers User Gui	de



Lock a Loan

Step	
Fill in all required fields as indicated with the red	 There are 3 ways a user can search for products and pricing.
asterisk *	 By using a defaulted or previously created scenario
	- By importing a FNM 3.2/MISMO 3.4 file
	- By manually inutting the search criteria
	The 2 meet comments used comparing an excitable in the

• The 3 most commonly used scenarios are available in the **Scenario** drop down.

🖍 newrez	AllRegs Contact Us - 🖵 Begin Live Chat Q Search by loan number or last name DMJ
🙆 Dashboard	Products & Pricing
🗮 My Pipeline	Product & Pricing
Create New Loan	
🖬 Product & Pricing	Search Criteria Clear All Fields
Rate Sheet	Apply Search Scenario
III Training	Select V Save Scenario Manage Scenarios
😩 Manage Team	
🖹 Resources 🗸 👻	Overall
Guidelines and Forms	Loan Type"
Self-Employed Income Request	Select
Ø Marketplace	
	Loan Features
	Loan Purpose Lien Position Document Type
	Purchase O 1st Existing Servicing Borrower 2nd 2nd 2nd

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Lock a Loan, cont.

Step	
2 Locate your rate	 Rates for 30, 45, 60, & 90 days are displayed with each search and you can toggle between each one.
	 Locate additional rates for your product by clicking the > next to the product name which will expand the rate stack.
	 Click on links under Credit/Cost or Monthly MI (if applicable).

 Click on links under Credit/Cost or Monthly MI (if applicable), for a pricing breakdown.

🔨 newrez			AllRegs	Contact Us 🔻	🖵 Begin Liv	e Chat Q S	earch by loan numbe	r or last name	
Dashboard	Products & Pricing > Searc	h Results							
My Pipeline	Product & Pricing								
Create New Loan									
Product & Pricing	Search Criteria								
Rate Sheet	Appraised Value	Sales Contract Price	Down Payment %	Dav	wn Payment An		ck the pe		
🛝 Training	\$400,000.00	\$400,000.00	20.000		0,000.00	lount	" search criteria.		
😫 Manage Team	Zip Code	DTI%	DSCR 0	Escr	row				
Resources 🗸 🗸	75205	35.000			pound Taxes a urance	nd			
Guidelines and Forms									Ø
Self-Employed Income Request	Eligible Products							Compare	e Products (0/5) 🔻
Marketplace	30 Day Lock 10/24/2022	45 Day Lock 11/07/2022		ay Lock 1/2022		0 Day Lock 2/21/2022	Pric	ed 09/22/2022 09	:55 AM CST
	Product			Fin	nal Rate	Credit/Cost	Monthly P&I \$	Monthly MI \$	A
	 CF30 Conforming Fixe 	d 30		5.5	596	(0.019%)/ \$60.80	\$1,816.92	\$0.00	Actions 🕶
				3.7	7596	<u>6.008% /</u> (\$19,225.60)	\$1,481.97	\$0.00	Actions 🕶
						14.191223100J			

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Step

3 Select Lock from Actions menu by desired rate

- Dropdown appears by hovering mouse over desired rate.
- Ineligible products and Near Misses with the reason(s) for being ineligible will appear at the bottom of the screen.

🔨 newrez			AllRegs Contact Us	- 🖵 Begin Li	ve Chat Q Sea	rch by loan number c	or last name					
Dashboard	Products & Pricing > Search	n Results										
My Pipeline	Product & Pricing	Pricing										
Create New Loan	Product & Pricing											
Product & Pricing	Search Criteria											
Rate Sheet	Appraised Value	Sales Contract Price	Down Payment %	Down Payment A	mount Base	Loan Amount						
Training	\$400,000.00	\$400,000.00	20.000	\$80,000.00),000.00						
Manage Team	Zip Code	DTI%	DSCR 0	Escrow								
Resources 🗸	75205	35.000		Impound Taxes Insurance	and							
Guidelines and Forms								ø				
Self-Employed Income Request	Eligible Products						Compare Pro	oducts (0/5) 🖪				
Marketplace	30 Day Lock 10/24/2022	45 Day Lock 11/07/2022	60 Day Lock 11/21/2022		90 Day Lock 12/21/2022	Priced	l 09/22/2022 09:28 /	AM CST				
	Product			Final Rate	Credit/Cost	Monthly P&I \$	Monthly MI	-				
	CF30 Conforming Fixed	130		5.5%	(0.019%)/ \$60.80	\$1,816.92	<u>\$0.00</u>	Actions 🔻				
	TestCF30 Test Product	Conforming Fixed 30		5.5%	<u>1.031% /</u> (<u>\$3,299,20</u>)	\$1,816.92	Lock \$0.0 Assign					
					(0.019%) /		Compare	e				

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EQUAL HOUSING

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Step

4 Verify Lock Details

Complete required fields and click Lock.

🖍 newrez				AllRe	gs Contact Us 🔻	및 Begin Live Chat	Q Search by loan number or last name	
Dashboard	Products & Pricing	> Search	h Results > Verify Lo	oan Details				
🗮 My Pipeline	Lock Loan							Lock
Create New Loan	Verify Loan Details							
Product & Pricing								
🖽 Rate Sheet	Primary Borrowe	r						
🐘 Training	First Name [*]		Last Name [*]	SSN*	11			
🚢 Manage Team								
🖺 Resources 🛛 👻	Property							
Guidelines and Forms	Existing Servicing Borrower							
Self-Employed Income Request		eet Address*						
@ Marketplace	TBD 3	516 Beverly	/ Drive					
	Unit Type		Zip Code*	City*				
	-Select-	~	75205	DALLAS				
	State*		County*	No. of Units*				
	Texas	~	DALLAS	✓ 1				
	Review Loan Deta	ails						
	Product Code			luct Description		Lien Position	Loan Type	
	CF30		Con	forming Fixed 30		First	Conventional	
	Amortization Type			ortization Term		Interest Only Years	Temporary Buydown	1
	Fixed		30 Y	'ear		N/A	N/A	

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Step	
5 Complete Ad Verification	dress • Select applicable radio button and then Confirm .
	Address Verification
	USPS Verified Address 3516 Beverly Dr, Dallas, TX 75205-2802
	Unverified Address O 3516 Beverly Drive, DALLAS, TX 75205
	Cancel

6 Select Rate and then click Lock My Loan.

- Click **Lock My** Loan if desired rate and term shows selected.
- Click See More Rates for additional rate options to select from.

🔨 newrez			AllRegs Contact	t Us 🔻 💭 Begin Live Chat	Q Search by loan nun	nber or last name
Dashboard	Products & Pricing > S	iearch Results > Verify Loan Deta	ails > Lock Loan			
My Pipeline	Lock Loan					Lock My Loan
Create New Loan						
Product & Pricing	Lock Information					
Rate Sheet	Primary Borrower Alice Firstimer	Borrower Address 3516 Beverly Dr	Product Type Conforming Fixed 30 - CF30	D		
1 Training	, and the source	DALLAS, TX 75205-2802	contorning interso crist	- -		
Manage Team		Dallas County				
Resources 🗸	Lock Selection					
Guidelines and Forms	Lock	Final Rate	Credit/Cost	Montly P&I	Monthly MI	
Self-Employed Income Request	30 Day	5.5%	(0.019%) / \$60.80	\$1,816.92	\$0.00	✓ Selected
Marketolace	45 Day	5.5%	0.070% / (\$224.00)	\$1,816.92	\$0.00	Select Lock
Click "S	See More Ra	tes" to view	0.259% / (\$828.80)	\$1,816.92	\$0.00	Select Lock
			0.634% / (\$2.028.80)	\$1,816.92	\$0.00	Select Lock
add	litional rate o	options.	See	More Rates		





Step

Complete Application Tracker (if applicable)

- Enter Application Date.
- Confirm all **6 Key Points of Data** have been received.
- Click Lock My Loan.

🖍 newrez	AllRegs	Contact Us 🔻 🖵 Begin Live Chat	Q Search by loan number or last name	DMJ
Dashboard	Products & Pricing > Search Results > Verify Loan Details > Lock Loan			
🗮 My Pipeline	Lock Loan		Lock My Loan	
Create New Loan	Application Tracker			
Product & Pricing				
Rate Sheet	6 of 6 Key Points of Data			
III Training	Borrower Name	 Alice Firstimer 		
😩 Manage Team	SSN / ITIN / PassportID	✓ XXX-XX-9991 ④		
- Wanage ream	Gross Monthly Income	✓ \$40,262.30		
🖹 Resources 🛛 💙	Appraised Value	✓ \$400,000		
Guidelines and Forms	Loan Amount	✓ \$320,000		
Self-Employed	Subject Property Address	 3517 Beverly Dr, Dallas, TX 7520 	5, Dallas	
Income Request				
Ø Marketplace	You have entered all 6 Key Points of Data in the loan record. Your Loan Estimate will need to be delivered within 3 business of	ays of 09/22/2022.		
	Application Date		1	
	09/22/2022 IIII ✓ I con	ïrm l have received all 6 Key Points of Data	,	

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Step 8 New Loan Has Been Created and Locked • Move forward with loan from What would you like to do next? section. • Each link will navigate you to that specific area for your loan.



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Assign a Rate/Product

Step	
Fill in all required fields as indicated with the red	 There are 3 ways a user can search for products and pricing. By using a defaulted or previously created scenario
asterisk *	 By importing a FNM 3.2/MISMO 3.4 file By manually inutting the search criteria
	 Dy manually mutting the search criteria The 3 most commonly used scenarios are available in the

 The 3 most commonly used scenarios are available in the Scenario drop down.

🖍 newrez	AllRegs Contact Us - 🖵 Begin Live Chat Q Search by loan number or last name
🙆 Dashboard	Products & Pricing
🗮 My Pipeline	Product & Pricing
🕒 Create New Loan	
🖬 Product & Pricing	Search Criteria Clear All Fields
Rate Sheet	Apply Search Scenario
III Training	Select Save Scenario Manage Scenarios
😩 Manage Team	
🖺 Resources 🛛 👻	Overall
Guidelines and Forms	Loan Type"
Self-Employed Income Request	Select
Ø Marketplace	
	Loan Features
	Loan Purpose Lien Position Document Type Existing Servicing Borrower
	Purchase O 1st Full Existing Servicing Borrower 2nd 2nd 2nd 2nd 2nd

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Step	
2 Locate your rate	 Rates for 30, 45, 60, & 90 days are displayed with each search and you can toggle between each one.
	 Locate additional rates for your product by clicking the > next to the product name which will expand the rate stack.

• Click on links under **Credit/Cost** or **Monthly MI** (if applicable), for a pricing breakdown.

🔨 newrez			AllRegs Contact	Us 👻 💭 Begin	Live Chat	Search by loan numbe	er or last name			
Dashboard	Products & Pricing > S	Products & Pricing > Search Results								
My Pipeline	Product & Pricing									
Create New Loan										
Product & Pricing	Search Criteria					Click t	he penc	il to edit		
Rate Sheet	Appraised Value	Sales Contract Price	Down Payment %	Down Payment % Down Payment Amount E		your	search c	riteria.		
Training	\$400,000.00	\$400,000.00	20.000	\$80,000.00 \$						
Manage Team	Zip Code	DTI%	DTI% DSCR O Escrow							
Resources 🔹 🗸	75205	35.000		Impound Taxe Insurance	Impound Taxes and Insurance					
Guidelines and Forms										
Self-Employed Income Request	Eligible Products						Compare	Products (0/5) 🔻		
Marketplace	30 Day Lock 10/24/2022	45 Day Lock 11/07/2022	60 Day Lock 11/21/2022		90 Day Lock 12/21/2022	Pric	ed 09/22/2022 09	55 AM CST		
						Monthly P&I	Monthly MI	*		
	Product			Final Rate	Credit/Cost	\$	\$			
	Product CF30 Conforming	; Fixed 30		Final Rate	Credit/Cost (0.019%)/ \$60.80	\$ \$1,816.92	\$ \$0.00	Actions 🗸		
		ş Fixed 30			(0.019%)/	-	-	Actions -		

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Step

3 Select Assign from Actions menu by desired rate

- Dropdown appears by hovering mouse over desired rate.
- Ineligible products and Near Misses with the reason(s) for being ineligible will appear at the bottom of the screen.

newrez			AllRegs Contact L	Js 🝷 💭 Begin Li	ve Chat 🔍 Sea	rch by loan number o	or last name	
Dashboard	Products & Pricing > Search	h Results						
My Pipeline	Due durat & Deinin -							
Create New Loan	Product & Pricing							
Product & Pricing	Search Criteria							
Rate Sheet	Appraised Value	Sales Contract Price	Down Payment %	Down Payment A		Loan Amount		
raining	\$400,000.00	\$400,000.00	20.000	\$80,000.00		,000.00		
/lanage Team	Zip Code	DTI%	DSCR ()	Escrow				
esources 🗸 🗸	75205		Impound Taxes Insurance	and				
Guidelines and Forms								
Self-Employed Income Request								
Marketplace	Eligible Products						Compare Pr	oducts (0/5)
	30 Day Lock 10/24/2022	45 Day Lock 11/07/2022	60 Day Lock 11/21/2022		90 Day Lock 12/21/2022	Priced	09/22/2022 09:28	AM CST
	Product			Final Rate	Credit/Cost	Monthly P&I \$	Monthly MI	
	CF30 Conforming Fixed	d 30		5.5%	(0.019%) / \$60.80	\$1,816.92	<u>\$0.00</u>	Actions 🗸
	> TestCF30 Test Product	Conforming Fixed 30		5.5%	<u>1.031% /</u> (<u>\$3,299.20</u>)	\$1,816.92	Lock \$0.0 Assign	
		Home Possible Fixed 30			(0.019%) /	\$1,816.92	Compar \$0.00	Actions 🔻

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•

Step

4 Verify Loan Details

Complete required fields and click Assign.

🖍 newrez				AllRegs	Contact Us 🔻	및 Begin Live Chat	Q Search by loan number or last name	
Dashboard	Products & Pri	cing > <u>Search</u>	<u>n Results</u> > Verify Loan I	Details				
🗮 My Pipeline	Assign Loar	ı						Assign
Create New Loan	Verify Loan De							
Product & Pricing								
Rate Sheet	Primary Borr	ower						
III Training	First Name*		Last Name [*] Firstimer	SSN* XXX-XX-9991	٢			
🚢 Manage Team								
🖹 Resources 🗸 🗸	Property							
Guidelines and Forms	Existing Servi Borrower	icing						
Self-Employed Income Request	_	Street Address*						
@ Marketplace	TBD	3516 Beverly	Dr					
	Unit Type		Zip Code*	City*				
	-Select-	~	75205	DALLAS				
	State*		County*	No. of Units*				
	Texas	~	DALLAS	• 1				
	Review Loan	Details						
	Product Code CF30			Description hing Fixed 30		Lien Position First	Loan Type Conventional	
	Amortization Ty Fixed	pe	Amortiza 30 Year	tion Term		Interest Only Years N/A	Temporary Buydown N/A	n

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omplete Address erification	 Select applicable radio but 	utton and then Confirm .
Address Verification		×
USPS Verified Address		
O 3516 Beverly Dr, D	allas, TX 75205-2802	
Unverified Address		
3516 Beverly Drive	, DALLAS, TX 75205	
		Cancel

6 Complete Application Tracker (if applicable) • Enter **Application Date** and Confirm all **6 Key Points of** Data have been received.

🖍 newrez	AllRegs	Contact Us 👻 💭 Begin Live Chat	Q Search by loan number or last name	
🙆 Dashboard	Products & Pricing > Search Results > Verify Loan Details			
🗮 My Pipeline	Assign Loan		Assign	
Create New Loan	Verify Loan Details			
🖬 Product & Pricing	Application Tracker			
Rate Sheet				
III Training	6 of 6 Key Points of Data Borrower Name	✓ Alice Firstimer		
🚢 Manage Team	SSN / ITIN / PassportID	✓ XXX-XX-9991 ④		
🖹 Resources 🛛 💙	Gross Monthly Income	✔ \$40,262.30		
Guidelines and Forms	Appraised Value	✓ \$400,000		
Self-Employed Income Request	Loan Amount Subject Property Address	 \$320,000 3516 Beverly Dr, Dallas, TX 75205 	5-2802	
@ Marketplace		,		
	You have entered all 6 Key Points of Data in the loan record. Your Loan Estimate will need to be delivered within 3 business di	ays of 09/22/2022.		
	Application Date	rm I have received all 6 Key Points of Data		

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Step

New Loan Has Been Created and Assigned

- Move forward with loan from What would you like to do next? section.
- Each link will navigate you to that specific area for your loan.



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Compare Products

Step	
Fill in all required fields as indicated with the red asterisk *	 There are 3 ways a user can search for products and pricing. By using a defaulted or previously created scenario By importing a FNM 3.2/MISMO 3.4 file By manually inutting the search criteria
	The 2 meet commonly used coordina are evailable in the

• The 3 most commonly used scenarios are available in the **Scenario** drop down.

🖍 newrez	AllRegs Contact Us Q Search by loan number or last name DMI
🕐 Dashboard	Products & Pricing
🗮 My Pipeline	Product & Pricing
🕒 Create New Loan	
🖬 Product & Pricing	Search Criteria Clear All Fields
Rate Sheet	Apply Search Scenario
	Select Save Scenario Manage Scenarios
🚢 Manage Team	
🖹 Resources 🛛 💙	Overall
Guidelines and Forms	Loan Type*
Self-Employed Income Request	Select
@ Marketplace	
	Loan Features
	Loan Purpose Lien Position Document Type
	Purchase O 1st Existing Servicing Borrower 2nd 2nd

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Compare Products, cont.

Step	
2 Locate your rate	 Rates for 30, 45, 60, & 90 days are displayed with each search and you can toggle between each one.
	 Locate additional rates for your product by clicking the > next to the product name which will expand the rate stack.
	Oliak on links under Credit/Cest er Menthly MI (if applicable)

 Click on links under Credit/Cost or Monthly MI (if applicable), for a pricing breakdown.

🔨 newrez			AllRegs Cont	act Us 🔻 🖵 Begir	Live Chat	earch by loan numb	er or last name	
Dashboard	Products & Pricing > Search	Results						
My Pipeline	Product & Pricing							
Oreate New Loan								
Product & Pricing	Search Criteria					Click t	he penc	il to edit
Rate Sheet	Appraised Value	Sales Contract Price	Down Payment %	Down Paymen	t Amount E		search o	
🕅 Training	\$400,000.00	\$400,000.00	20.000	\$80,000.00	2	<i>y</i> 0 0.1	o o ai o i i c	
😫 Manage Team	Zip Code	DTI%	DSCR 0	Escrow				
Resources 🔹 🗸	75205	35.000		Impound Tax Insurance	es and			
Guidelines and Forms								ø
Self-Employed Income Request	Eligible Products						Compare	e Products (0/5) 🔻
Marketplace	30 Day Lock 10/24/2022	45 Day Lock 11/07/2022	60 Day Lo 11/21/20		90 Day Lock 12/21/2022	Pric	ed 09/22/2022 09:	:55 AM CST
,	Product			Final Rate	Credit/Cost	Monthly P&I \$	Monthly MI \$	*
	 CF30 Conforming Fixed 	30		5.5%	<u>(0.019%)</u> / <u>\$60.80</u>	\$1,816.92	\$0.00	Actions 🕶
				3.75%	6.008% / (\$19,225.60)	\$1,481.97	\$0.00	Actions 🗸
					5 728% /			

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Compare Products, cont.

Step

3 Select Compare from Actions dropdown and click Compare Products

- Dropdown appears by hovering mouse over desired rate.
- Can compare up to 5 different rates/products within any of the lock terms returned.

🔨 newrez			AllRegs	Contact Us 🔻	및 Begin Liv	e Chat 🔍 Se	earch by loan number	or last name	DN
Dashboard	Products & Pricing > Searc	h Results							
My Pipeline	Product & Pricing								
Create New Loan									
Product & Pricing	Search Criteria								
Rate Sheet	Appraised Value	Sales Contract Price	Down Payment %	D	Down Payment An	nount Ba	se Loan Amount		
Training	\$400,000.00	\$400,000.00	20.000	\$	\$80,000.00	\$3	20,000.00		
Manage Team	Zip Code	DTI%	DSCR ()	E	scrow				
Resources 🗸	75205-2802	35.000			mpound Taxes a nsurance	ind			
Guidelines and Forms								Compare	Products (2/5)
Self-Employed									
Income Request	Eligible Products						Priced	d 09/22/2022 11:	21 AM CST
Marketplace	Eligible Products 30 Day Lock 10/24/2022	45 Day Lock 11/07/2022		Day Lock /21/2022		0 Day Lock 12/21/2022	Priced ly P&I	Monthly MI	
income Request	30 Day Lock						ly P&I Moni ≑	Monthly MI	
income Request	30 Day Lock 10/24/2022 Product	11/07/2022			Final Rate	12/21/2022	l <mark>} P&I</mark> Moni ∳ 92	Monthly MI	
income Request	30 Day Lock 10/24/2022	11/07/2022				Credit/Cost	92 \$1,81	Monthly MI ¢ \$1.00	Comparing
income Request	30 Day Lock 10/24/2022 Product	11/07/2022			Final Rate	Credit/Cost (0.019%)/	l <mark>} P&I</mark> Moni ∳ 92	Monthly MI	Comparing
income Request	30 Day Lock 10/24/2022 Product CF30 Conforming Fixe TestCF30 Test Product	d 30 t Conforming Fixed 30			Final Rate	Credit/Cost (0.019%)/ \$60.80 1.031%/	92 92	Monthly MI ¢ \$1.00	Comparing Comparing
income Request	30 Day Lock 10/24/2022 Product CF30 Conforming Fixe TestCF30 Test Product	11/07/2022			Final Rate 5,5% 5,5%	2/21/2022 Credit/Cost (0.019%)/ 560.80 1.031%/ (53.299.20) 0.019%)/ 560.80	y P&I Mont	Monthly MI	Comparing 1 Comparing 1 Actions -
income Request	30 Day Lock 10/24/2022 Product CF30 Conforming Fixe TestCF30 Test Product CHIMPF30 Conforming	d 30 t Conforming Fixed 30	11		Final Rate 5,5% 5,5%	Credit/Cost (0.01996)/ \$60.80 1.03195/ (\$3.299.20) (0.01996)/	y ₽&I Mont 92 \$1,81 92 \$1,81 92	Monthly MI \$.00 \$.00 \$.00 \$.00 \$.00 \$.00 \$.00 \$.00 \$.00 \$.00	Comparing Comparing Comparing Actions

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Compare Products, cont.

C1-	-
Ste	n
	Ρ.

Select Assign or LockClick hLoanRate/Pr

- Click <u>here</u> if you select **Assign** to complete the Assign a Rate/Product process.
- Click <u>here</u> if you select Lock Loan to complete the Lock Loan process.



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	=7	673-5521. NMLS #3013 (www.nmlsconsumeraccess.org). For real estate and mortgage professionals only and not intended for distribution to consumers or	Blueprint for Brokers User Guide	Page 3 4



My Account Settings

The **My Account Settings** feature allows users to set up certain details about their account within the Blueprint for Brokers Portal.

Step

1 Click on your name icon and then My Account Settings



My Employee Details

Can enter NMLS license number and additional contact info. **Pipeline Access** Users can grant other users within the brokerage access to their pipeline.

Credit Vendor Credentials Add/edit credit provider accounts to use when pulling

credit.

Notifications

Set preferences for loan status notifications (LSN's) that are received on each loan.

Account				Save Chang
My Employee	Details	Pipeline Access	Credit Vendor Credentials	Notifications
Account				
Account Username	Employee Role			
deepa.joejones	Loan Officer			
Name				
irst Name	Middle Name	Last Name	Suffix	
Deepa Mohandas		Joe Jones		
License Driginator NMLS License # [*] 000000				
Contact				
Office Phone Number*	Office Extension	Cell Phone Number		
(000) 000-0000				
mail Address				
abc@caliberhomeloans.				

Go to table of contents





My Account Settings, cont.

My Employee Details: Enter NMLS License number and additional contact info.

My Employee Details		Pipeline Access	Crea	dit Vendor Credentials	Notifications
Account Account Username deepa.joejones	Employee Role Loan Officer	ir			ber and contact ed from this scree
Name First Name	Middle Name	Last Name	Suffix		
originator NMLS License # [*]					
Contact			- 1		
office Phone Number*	Office Extension	Cell Phone Nu	mber		
(000) 000-0000					
mail Address					
mail Address					

Pipeline Access: Users can grant other users within the brokerage access to their pipeline.

My Employee Details	Pipeline Access	Credit Vendor Credentials	Notifications
ipeline Access Settings Q. Search by name Dis active employees Employee Name ©	Use search box to quickly search for specific user.		
AA-SOne AA-S-One			
AA-S-THREE AA-S-THREE			
AAA-TWO AAA-TWO			Clicking the check
АААА АААВ	2		box will grant that
AAAC AAAD	2		user access to you
AAAEELEVEN AAAELEVEN			pipeline.
AAA-TEN AAATEN			



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My Account Settings, cont.

Credit Vendor Credentials: Add/edit credit provider accounts to use when pulling credit.

My Account			Save Changes
My Employee Details	Pipeline Access	Credit Vendor Credentials	Notifications
Accounts Credit Agency	Account Username	Account Pass	word
Add Another Account	✓	password	

Notifications: Set preferences for loan status notifications (LSN's) that are received on each loan.

My Account			Save Chang
My Employee Details	Pipeline Access	Credit Vendor Credentials	Notifications
 View Change History General Notifications Receive Caliber Rate Sheets Loan Notifications Pre-Submission Unselect All The FHA Case Number Request has been submitted Thank you for your loan Registration Thank you for your loan Submission Application Accepted for Loan LE Package has been e-signed by borrower 	of what cha	ge History" shows a list inges have been made.	
Underwriting Unselect All UW Decision Updated Handler UUW Decision Updated Handler Underwriting Approved Handler Loan is in Underwriting Appraisal Unselect All Appraisal update has been posted for Loan Reply to Appraisal Cancellation Request has been rec Your appraisal is complete for Loan The appraisal for Ioan has received a communication		ns for that	

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Advanced Search

The **Advanced Search** feature allows users to search for existing loans within the Blueprint for Brokers Portal using additional search criteria.

 Step

 Select Advanced Search

 Click in the search bar from any screen within the Blueprint for Brokers Portal and then Advanced Search.

 <u>Y29742024</u>
 <u>Y729742024</u>
 <u>Y747538701</u>
 <u>America. Andy</u>
 <u>Y44772097</u>
 <u>Kelli, Testingins</u>

	5725742024	Th Senticity / nee	
	9747538701	America, Andy	-11
	9744772097	Kelli, TestingIns	r bre
	9762534023	America, Test	
Ŀ	9726360523	America, Test	
۵	9716884680	Firstimer, Alice	Date
	9707875390	America, Andy	
	9761445122	Firstimer, Alice	
	9797490993	America, Andy	
	9765962080	America, Andy	g
		Advanced Search	

2 Enter Search Criteria

• Click **Search** when all desired criteria has been entered.

🖍 newrez		AllRegs Contact Us 🔻	D Begin Live Chat	Q Search by loan number or last name		DMU
 Dashboard My Pipeline 	Advanced Search				Search)
 Create New Loan Product & Pricing Rate Sheet Training Manage Team Resources 	Search Criteria Coverall Include loans created after mm/dd/yyyy Loan Stage (From) Coverage	Exclude Cancelled Loans	Loan Officer	Ex	pand All / Collapse All	
 Guidelines and Forms Self-Employed Income Request Marketplace 	✓ Loan Features Purpose ✓ Amortization Term ✓	Document Type I	Loan Type	~		
© 2022 Newrez 673-5521. NML	S #3013 (www.nmlsconsumera essionals only and not intende	Fort Washington, PA 19034.1-88	Bluep	int for Brokers User Guide	Pagel	38



Advanced Search, cont.

Step

3 Select loan number from • Click the *** to modify the Search Criteria. search results

newrez				AllRegs	Contact Us 👻 💭	Begin Live Chat	Q Search by loan number	r or last name	
Dashboard My Pipeline	Search Results							Reset	Search
Create New Loan Product & Pricing Rate Sheet	Search Criteria Borrower First Name Alice	Borrower Las Firstimer	st Name	Property City	/ Loan Stage 	(From)	Loan Stage (To) 	Property Type	ø
Training Manage Team	124 search results								
Resources	Loan Number	Borrower 🖨	SSN 🗢		Property Address 🗢	Lock Status	Product 🗢	Loan Stage 🗢	^
Guidelines and Forms	9740649315 Purchase	Alice Firstimer	XXX-XX-9991		3516 Beverly Dr Dallas TX 75205-2802	S.5%	CF30	Created o	
Self-Employed Income Request Marketplace	9764147089 Purchase	Alice Firstimer	XXX-XX-9991		3517 Beverly Dr DALLAS TX 75205- 2802	S.5%	CF30	Created o	
	9768811524 Purchase	Alice Firstimer	XXX-XX-9991		3516 Beverly Drive DALLAS TX 75205	5.5% Expires 10/24/202	CF30	Created 0	
	9749019916 Purchase	Alice Firstimer	XXX-XX-9991		1322 Elmdale Ave BEVERLY HILLS CA 90209	2.5% Not Locked	FF30	Created o	
	9792103161 Purchase	Alice Firstimer	XXX-XX-9991		1322 Elmdale Ave BEVERLY HILLS CA 90209	2.5% Not Locked	FF30	Created o	
	9715805678 Purchase	Alice Firstimer	XXX-XX-9991		1322 Elmdale Ave BEVERLY HILLS CA 90209	2.5% Not Locked	FF30	Created o	
				«« «	1 (current) 2 3	» »»			

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Self-Employed Income Request

The **Self-Employed Income Request (SEIR)** allows users a quick way to get borrower bank statements analyzed by an underwriter for SmartSelf Non-QM loans. Requests are usually worked within one business day depending upon Underwriter volume. This income can then be entered for the borrower/business in the Employment section of the 1003.

🖍 newrez	AllRegs Contact Us Q Search by loan number or last name	DMJ
 Dashboard My Pipeline 	Self-Employed Income Request	Submit
Create New Loan	This option for Self-Employment Income Request is to be used for Income Calculations for the Smart Self Bank statement program ONLY.	Clear All Fields
 Product & Pricing Rate Sheet 	Subject Line*	
Training	Loan Number (If Applicable)	
 Manage Team Resources Guidelines and 	List All Borrowers on the Loan" Bank Statement Type" Bank Statements Personal Statements Personal Statements Personal Statements with separate 3-month Business Statements	
Forms Self-Employed Income Request	Separate borrowers with commas Name of Business For Qualification* Type of Business (industry)*	
	Income Request Attachment [*] Income Request Attachment [*] Drag & Drop Files Here Supported File Types: ,pdf, jpg, ,png, ,tiff Browse For any calculation to be completed a full 12 or 24 month business or personal bank statements must be provided including all pages and in consecutive order, If utilizing personal bank	
	statements for the calculation with no expense factor, it must be accompanied by 3 months operating business bank statements for the business being used to qualify. If rental income is included on the loan application, additional due diligence will apply and may impact the income calculation. Description/Additional Notes*	

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Self-Employed Income Request, cont.

Step 1 Select Self-Employed Income Request \land newrez Contact Us 🔻 Begin Live Chat DM Dashboard Welcome Back, Deepa Mohandas I My Pipeline We need your help with 369 item Create New Loan Product & Pricing 354 Items to Review 14 Loans with Outstanding Conditions Loan Analytics Month to Date 🗸 1 Upcoming Deadlines III Rate Sheet Loan Number Borrower 🖨 Required Actions \$ Lock Status 7 52 IN Training Run AUS Firstimer, Alice 9789685220 ſ Closed In Underwriting BEVERLY HILLS,CA + 2 more Purchase (Caliber) 🖀 Manage Team 9765825410 Firsttimer, Alice More required action for Loan 9789685220 X • Resources Purchase (Caliber) Create Newrez LE \$728K N/A Guidelin Forms 9750990856 firsttimer, alice Submit Loan **e** Funded Company Ranking Purchase (Caliber) Self-Emple Income Re 9771617587 Run AUS Firsttimer, Alice **P** +.1.more Purchase (Caliber) Run AUS 9700831200 firsttimer, alice • Congrats on your Rezidents Club status! Purchase (Caliber) ±.2.more

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Self-Employed Income Request, cont.

St	te	р

2 Complete required fields and click Submit

- A single request should be submitted for borrowers with more than one business, and/or for multiple self-employed borrowers on the same loan.
- Requestor and their AE will receive an e-mail confirmation of the request.

🖍 newrez		AllRegs	Contact Us 🔻	🖵 Begin Live Chat	Q Search by loan number or last r	ame DMU
Dashboard	Self-Employed Income Request					Submit
🗮 My Pipeline						
Create New Loan	This option for Self-Employment Income Request	is to be used for Income Calculations for the Sm	art Self Bank stat	ement program ONLY.		Clear All Fields
Product & Pricing	Subject Line*					
Rate Sheet						
ii Training	Loan Number (If Applicable)					
🚢 Manage Team						
🖹 Resources 🗸 🗸	List All Borrowers on the Loan*	Bank Statement Type"				
Guidelines and Forms		Personal Statements (Combined, no separate 3-mo Personal Statements with separate 3-mo				
Self-Employed Income Request	Separate borrowers with commas		nui business sta	ements		
Ø Marketplace	Name of Business For Qualification*	Type of Business (industry)*				
Guidelines and Forms	Income Request Attachment*					
	Supported File Typ Brc	op Files Here es.pdf. jpgpngttff wwse				
	must be provided including all pages and in con statements for the calculation with no expense operating business bank statements for the bu	factor, it must be accompanied by 3 months		as pos anyon	sible and inc	oout the busin lude the name b be added to a spondence.

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H20



Accessing **H2O** from the Blueprint for Brokers Portal brings improved functionality and increased efficiency for working on your loans.

Left Menu: Allows for easy navigation within H2O to access the necessary steps and pages required throughout the lifecycle of the loan.

Right Menu: Provides Loan Summary and Key Dates for the loan to be located with one click.

- Click on 📕 to expand the **Loan Summary** for more information about the Property, Loan, Underwriting details, or Borrower.
- Click on 🖪 to have the contact detail for the loan open in a new window.
- Click on **()** to expand the **Date Tracker** which provides key dates for the loan.

	k Status Loan Stage Required A	
003 🗸	"Menu" allows	s to toggle between Loan Summary
Loan Overview		u and Loan Menu
Property & Borrower		formation Transaction
Emp, Income &	0	ptions. Save & Next
Housing Assets, Liab & REO	Submit Loa	
Decl. & Demo. information	CD Collaborat	
Details of Transtraction	▼ Date Track	
Addendum	Alert/Stops History	Last Name: Firstimer Cell # Last Name: Cell # Cell
oduct & Pricing	View Stage History	Suffix: DOB: 1/1/1965 Suffix: DOB: SSN D00X0X/9991 Age: 57 SSN Age:
ck Loan		Number is 1111k Eugerian/FICO: TransUnion/Empirica: Non-Tradsonal Credt Equifix/ERECON: Foreign National
•wrez LE Getting Started		Electronic Delivery and Borrower Auth & Cert
Fees		BORROWER HUST PROVIDE CONSENT FOR E-DELIVERY/low must read the consent for Electronic Delivery script and obtain consent from the borrower before entering DocuSign Access code below:Consent for Electronic Delivery Script.
Taxes & Insurance		Borrower Consent Raceived NOTE: Under the law, e-disclosures may only be sent to email addresses associated with the borrowers on this loan. Sending disclosures
Prorations & Adjustments		to another email address is a violation of Caliber policy. Email: tedoan@mailnataccom Email:
Preview LE		Access code:
Additional Newrez Disclosures		BORROWER AUTH & CERT: A signed Borrower Authorization and Certification Disclosure is required for digital verifications.
Additional Broker Disclosures		SEND/RECEIVE BORROWER AUTH & CERT: Upload Signed Auth
Generate Disclosures		





Newrez LE

The **Newrez LE** provides a simplified and intuitive workflow, with no unnecessary information on the screens guiding the user swiftly through each step in the proper order.

	Ste	ер									
1 Select	: Create	Newre	ez LE		Cre Nev	eate Ne wrez L	ewrez LE E.	; when in	a loan, sele	uired Action ct Getting Sta as a product a	arted under
	🖍 newrez							AllRegs Contact Us	Q Search by la	pan number or last name	Ŭ.
	Dashboard My Pipeline Create New Loan	Welcome Ba	ick, Deepa Mo 369 items.	handas						blueprint	
	 Product & Pricing Rate Sheet 	354 Ite	ms to Review	1 Upc	coming Deadlines	uired Actions 🗢	14 Loans with Outstand	ng Conditions	Loan Analytics	Month to Date 💌	
	Training Manage Team	9789685220 Purchase (Caliber)	Rin	ttimer, Alice ERLY HILLS,CA	Run	AUS	e e		7 Closed	52 In Underwriting	
	Resources Guidelines and Forms	9765825410 Purchase (Caliber) 9750990856 Purchase (Caliber)	Fin TX TX	Crea	ate Newrez Li		9789685220 ×		\$728K Funded	N/A Company Ranking	
	Self-Employed Income Request	9771617587 Purchase (Caliber)	Fin	ittimer, Alice	mit Loan						
		9700831200 Purchase (Caliber)	firs TX	ttimer, alice	Run <u>+ 2</u>	AUS more	•		Congrats on your	Rezidents Club status!	
	Loan Number P	Menu rimary Borrower rstimer, Alice	Lock Status L Lock Status C	oan Stage Requ reated - <u>Run</u>	uired Action		AllRes	ps Contact Us 🕶 🖳	Begin Live Chat Q Search for Joan no	umbers DNU	
	Loan Overview Property & Borrow	ver		H₂Ċ		N E		Begin Live Chat	Contact Us Log Out Search: Gs Advanced Search		3
	Emp, Income & Housing Assets, Liab & REC			Summary	Contacts	Wholesale		My Pi	eFile Tools Save Undo		1
	Decl. & Demo. Information	Y		Status Current Status: Created		Lender Paid 0.750% 9721440684 - Firstime	r, Alice	Redesigned 1003	Created 🔓 📆		
	Getting	started		LOCK U Cancellation/Deni Action Ite	Unlocked 🛃 🥏 Locked 🛱 ems 🔁				Switch to Traditional URLA		
	O Fees			LoanAdvisor Assi CaliberLE Fee	o3 sign a Product es & Disclosures	Company: Caliber Home Loar	s +				
	O Taxes &	Insurance		AUS AUS	aital Mortgage 5 anScorecard	Loan Propert	y & Emp, Inc & Asset, Liab & D	cl. & Demo. Details of Addendur	Demographic Information		
	• Proration Adjustm			Appraisal Ord My efile Doc	der/View Status cs / Conditions nt Document	Loan Summ	nothing NEO 2	In a bactori	Save & Next		
	• Preview			Subm	nt Document	Borrower Details		CoBorrower Detail	y From Borrower Manage Borrowers		
	Disclosu			₹ Date	e Tracker y Tracker	First Name: Alice Middle Name: Last Name: Firstimer	Home # 214-555-1111 Work # E	First Name:	Home #		
	Disclosu			Alert/Stops Histo View Stage Histor	איז η	Suffic: 2000-000-99	DOB: 1/1/1965	Last Name: Suffac SSN	Cell # DOB: Age:		
	O Generati	e Disclosures				Experian/FICO:	Applicant is a Veteran	Experian/FICO: TransUnion/Empirica:	Applicant is a Veteran Non-Traditional Credit		*

Go to table of contents





Step

•

2 Click Run Fee Quote.

Run Fee Quote appears when all required fields are complete.

Loan Number Primary Borrower Lock Itatus Loan Stage Required Action 972144084 Pristmer, Alce Linkoled Created Required Action	
1003 Getting Started	e Quote
Product & Pricing	- 0
Lock Loan Key Dates Ex. Gene Date * Ket Rend Date * First Payment Date *	
Newrez LE 10/07/2022 C 10/07/2022 C 12/07/2022	
Gentry Samed	
Pers Delivery Method	
Trans & Nexurine Vestign USFs Providence & Providence Array method you are indicating that Providence Array	
Adjustments the borrower consents to electronic delivery.	
Product IS AddStrout Inverse Product & Rate	
Declorement Front Control Contro Control Control Cont	
Conforming Rises 30 - C730 🗎	
Generate Disclosures Interest late * Interest late * Interest rate with % // \$ Lender Credit Interest rate with % // \$	
lequest a Change X interest rate with X / S discount fee paid by borrower	
Aufmitte UW 5.500 5/ Interest rate locked at par	
tear Choice AUS	
	f
Appraisal waivers received	Trom
Appraisal Services running ClearChoice AUS v	will ha
, will a rush order be required for the appraisal?* O Yes • No identified here.	
> Is the subject property a complex property?* O Yes O No	

Add Services (optional)

- Click **Add Service** to select from services to be added.
- Only SSP's that are manually added can be removed.

	ry Borrower Lock Status Loan Stage ner, Alice 🔒 Unlocked Created	Required Action Run AUS +2			
1003 > Product & Pricing	Getting Started	Click the star icon to	designate SSP as	a favorite	Go Back Save
Lock Loan	Settlement Service Providers				O Add
Newrez LE 🗸 🗸	Provider Type	Provider	Location	Proximity to Subject (mi)	Fee Amount
Getting Started	Land Survey	CBG Surveying Texas LLC	1234 All American Way,1234 All American Way Dallas, TX 75223	7.39	\$460.00
Taxes & Insurance	Appraisal Fee	Caliber Home Loans - Appraisal Fee Schedule	1234 All American Way Irving, TX 75063	13.56	\$600.00
Adjustments Preview LE	Settlement Services	Independence	lect a different pro	wider and i	utiliza coarab bar
	Title Insurance	Independence	red SSP. If SSP is		

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Step

4 Add Fees (optional)

- Click Add Fees to add fees. Fee modal allows for multiple fees to be selected at once.
- Click "..." to Edit, Split, Add Custom SSP, or Remove fees.

🖍 newrez	Menu						AllRegs	Contact Us 👻	D Begin Live Chat	Q Search by loan	number or last name
	Primary Borrower Firstimer, Alice	Lock Status	Loan Stage Created	Required Action Run AUS +2							
003 Product & Pricing	> Getting Star	ted > Fees									Save & Next
tk Loan wrez LE	By continuin	g to the next step, you a	acknowledge that you	have disclosed all cu	ustomary fees or other fees to	the transaction in section "H. Other Fe	25"				Lender Fees Waived
Getting Started	✓ A. Orig	ination - \$899.00 (2)								
Fees	Туре			APR	Paid To	Paid By		Points		Due at Closing	Total
Taxes & Insurance	e Admin	istration Fee			A f				a al tra	\$899.00	\$899.00 ***
Adjustments Preview LE	DISCO	UNT FEE				s with a \$0.0				\$0.00	\$0.00 ***
Additional Newre Disclosures Additional Broke	✓ B. Serv	ices Borrower Canno	t Shop For - \$889.4	19 (6)	red and	l require an a	amount d	eente	erea.		
Generate Disclos	Туре			APR	Paid To	Paid By	Points		POC	Due at Closing	Edit —
isclosure Tracking		sal Fee			Lender	Borrower			\$600.00	\$0.00	
equest a Change	Credit	Report Fee			Other	Borrower			\$0.00	\$0.00	Split
ubmit to UW lear Choice AUS	Flood	Certification			Lender	Borrower			\$0.00	\$10.65	Add Custom SSP
ppraisal	MERS				Lender	Borrower			\$0.00	\$24.95	Remove
ocs & Conditions	7.00 6	rvice Fee			Lender	Borrower			\$0.00	\$93.89	\$93.89

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Step

6 Add Affiliates (optional)

Ability to add new affiliates or select from current affiliates will appear upon answering required affiliate questions.

	ry Borrower Lock Status Loan Sta ner, Alice 🔒 Unlocked Created		n						
)3 >	Getting Started > Fees							O Add Fees	Save & Next
oduct & Pricing									
tk Loan wrez LE 🗸 🗸	✓ B. Services Borrower Cannot Shop For								
	Туре	APR	Paid To	Paid By	Points	POC	Due at Closing	Total	
Getting Started	Appraisal Fee		Lender	Borrower		\$600.00	\$0.00	\$600.00	•••
Taxes & Insurance	Credit Report Fee		Other	Borrower	0	\$20.00	\$0.00	\$20.00	
Prorations & Adjustments	Flood Certification		Lender	Borrower		\$0.00	\$10.65	\$10.65	
Preview LE Additional Newrez	MERS		Lender	Borrower		\$0.00	\$24.95	\$24.95	
Disclosures Additional Broker Disclosures	Tax Service Fee		Lender	Borrower		\$0.00	\$93.89	\$93.89	
Generate Disclosures	Texas Attorney Review Fee		Other	Borrower		\$0.00	\$160.00	\$160.00	
quest alge	Does your company or any of its mo				one of your mortgage loan origin	ators? *		O Yes 🔾	No
ar Cho JS praisal cs & Cc	Was a referral to an affiliate of your	company or one of	your loan originators m	nade to the borrower for this	transaction? *			🔾 Yes 🔘	No
Collab _{or} Select Fi	rom My Affiliates	100 For - \$3,435.	94 (9)				Due at i	• Yes	No
Add Nev	w Affiliate	APR	SSP	Paid To	Paid By	,)	\$450.00		
							\$85.00	\$85.00	

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Step

6 Add and Insurance (optional)

- A limited number of fields, such as "Paid by" for Escrows and Prepaids, can be edited once PTE is returned.
- Option to choose blanket coverage for HOI can be found within the Insurance modal.

🖍 ne	ewrez	Menu						AllRegs Contact U	s 👻 🖳 Begin Live Chat	Search by loan number or last name	
Loan Num 97214406		rimary Borrower Irstimer, Alice	Lock Status	Loan Stage Created	Required Action Run AUS +2						
1003		> Getting Star	ted > Fees > Tax	xes & Insurance							Save & Next
Product 8	& Pricing										
Lock Loar	in	Taxes									
Newrez L	LE	•								C A	dd Taxes
Gett	tting Started	Туре		Impounds		Monthly Amount	Annual Amount	Prepaid Months/Total	Escrow Months/Total	РТЕ	
Fees	- IS	Count	y	Taxes And Insura	ance	\$5,872.33	\$70,467.97	00 / \$0.00	01 / \$5,872.33	Yes	
 Taxe 	es & Insurance								_	b Course	. 1
	ustments	Insurance	County							C Add	Insurance
O Prev	view LE	Туре		Impounds		Installment Due Date	Monthly Amount	Annual Amount	Prepaid Months/Total	Escrow Months/Total	
	ditional Newrez closures	Home	owners	Taxes And Insura	ance	10/7/2022	\$15.00	\$180.00	12/\$180.00	03 / \$45.00	C 🕯
	ditional Broker closures									Aggregate Ad	justment Total: -\$30.00
Gen	nerate Disclosu	res									

Enter Prorations & Adjustments (optional)

Click **Add Adjustment** to add any adjustments to the loan such as Tax prorations or Escrow holdbacks.

newrez Me	าน	AllRegs	Contact Us 👻 🖵 Begin L	ve Chat Q Search by loan number	er or last name	DMU
	ry Borrower Lock Status Loan Stag ner, Alice 🔒 Unlocked Created	e Required Action <u>Run AUS</u> +2				
1003	Getting Started > Fees > Taxes & Insurance	Prorations & Adjustment	ts		Save & No	ext 🗒
Product & Pricing						0
Lock Loan	Optionally enter any prorations or adjustment so that each party is paying only for the time whic		irly divide property expenses be	tween the Buyer and Seller	Add Adjustme	ent
Newrez LE 🗸 🗸						-
Getting Started	Optionally enter any prorations or adjustme so that each party is paying only for the time wh		fairly divide property expenses	between the Buyer and Seller	Add Adjus	tment
Fees	Adjustment Type	Total	Paid From/To			- 1
Taxes & Insurance						_
Prorations & Adjustments	Tax Proration 🗸	\$ 500.00	 Paid from B Paid to Borr 		×	×
Preview LE						_
Additional Newrez	Net Total		Paid from/	to opens the		
Only ava	ailable adjustment typ	es for 🛛 🗖		e field based		
	will appear in the drop					
			on adjust	ment type.		
0+.						
<u>Go to</u>	<u>table of contents</u>					
	.C, 1100 Virginia Dr., Ste. 125, Fo					
	\$3013 (www.nmlsconsumeracc			Blueprint for Brokers	User Guide P	age
ortgage profes: her third partie	sionals only and not intended	tor distribution to c	consumers or			0
iei anna partie	٥.					



Step

8 Review Preview LE

Click Save & Next.

newrez Menu			AllRegs Contact Us - 💭 Begin Live Chat	loan number or last name
umber Primary 10684 Firstime	Borrower Lock Status Loan Stage Required Action ar, Alice ▲ Unlocked Created - Run AUS #2			
& Pricing	Getting Started > > Taxes & Insurance > Prorations & Adjustments > Preview LE			Sav & Next
	Loan Costs		Other Costs	
LE ¥	A. Origination Charges	\$899.00	E. Taxes and Other Government Fees	\$186.00
ting Started	Administration Fee	\$899.00	Recording Fees and Other Taxes	\$186.00
s	DISCOUNT FEE	\$0.00		
es & Insurance			F. Prepaids	\$1,402.25
rations & ustments	B. Services Borrower Cannot Shop For	\$909.49	Hazard Insurance Premium 12 months	\$180.00
iew LE	Appraisal Fee	\$600.00	Prepaid Interest \$48.89 per day for 25 days @ 5.50%	\$1.222.25
itional Newrez	Credit Report Fee	\$20.00	G. Initial Escrow Payment at Closing	\$5,917.33
losures	Flood Certification	\$10.65	Hazard Insurance \$15.00 per month for 3 mo.	\$45.00
itional Broker losures	MERS	\$24.95	Property Taxes \$5.872.33 per month for 1 mo.	\$5.872.33
erate Disclosures	Mortgage Insurance Premium	\$0.00		
e Tracking	Tax Service Fee	\$93.89	H. Other Fees	\$522.00
Change	Texas Attorney Review Fee	\$160.00	Title - Owner's Title Insurance	\$522.00
UW	C. Services Borrower Can Shop For	\$3,435.94	I. TOTAL OTHER COSTS (E+F+G+H)	\$8,027.58
ice AUS	Title - Closing/Settlement/Attorney Fee	\$450.00		
	Title - Courier fee	\$85.00	J. TOTAL CLOSING COSTS	\$13,272.01
	Title - Document Preparation Fee	\$200.00	D + I	\$13,272.01
onditions	Title - Guaranty Fee	\$4.00	Lender Credits	\$0.00
oration	Title - Lender Required Survey Fee	\$460.00		
	Title - Lender Title Insurance	\$1,991.00	Calculating Cash to Close	
	Title - Recording Service Fee	\$7.00	Total Closing Costs	\$13,272.01
	Title - Tax Certificate Fee	\$69.39	Closing Costs Financed (Paid from your loan amount)	- \$0.00
	Title - Title Endorsement	\$169.55	Down Payment/Funds from Borrower	+ \$80,000.00

9 Answer Additional Newrez **Disclosures Questions**

673-5521. NMLS #3013 (www.nmlsconsumeraccess.org). For real estate and

Selecting **Yes** to question 2 can open additional questions.

Blueprint for Brokers User Guide

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	ary Borrower imer, Alice	Lock Status	Loan Stage Created	Required Action Run AUS +2						
1003 > Product & Pricing Lock Loan	Getting Starter	> > Prorat	ions & Adjustments	Ruinus re Preview LE > Additional Newrez Disclosures					Save & Next	
Newrez LE Getting Started Fees Taxes & Insurance	O Yes 🔿	to Include Anti-Steer IO es, I acknowledge th	ing disclosure in the Ne at it is my responsibilit	-	ated to accurately represent the options available to the borro	ver as				
Prorations & Adjustments	Category			interest Rate	Origination Charges Minus Lender Credit					
O Preview LE	Lowest Inte	rest Rate		0	%	[\$ 0			
 Additional Newrez Disclosures 	Lowest Inte	rest Rate & No Risky	Features ()	0	%		\$ 0			
Additional Broker Disclosures Generate Disclosures	Lowest Tot	I Origination Points	& Fees 0	0	%		\$ 0 this is a credit, type "-" before the	number.		
Disclosure Tracking	Terms of Y	ur Loan Selection				s	899			
Request a Change Submit to UW Clear Choice AUS		e the current pricing Pricing →	; click the link below.		ke you into H2O duct & Pricing.					
Go	to ta	ble o [.]	fcont	ents						





Step

- 10 Upload Additional Broker Disclosures (optional) If not uploading skip to step 12.
- Click Browse to upload from your computer or utilize drag and drop.
- Click Upload.

🖍 newrez 🛛 Meni	AllRegs Contact Us + 🖵 Begin Live Chat 0. Search by loan number or last name DMU			
Loan Number Primar 9721440684 Firstim	yBerrower Lock Status Loan Stage Required Action 3n er, Alce 🔒 Unicocled Created : <u>Run AUS</u> #2			
1003 >	Getting Started > > Preview LE > Additional Newrez Disclosures > Additional Broker Disclosures			
Number Pirst Weig Losk Satur Losk Satur Losk Satur Losk Satur Losk Satur 103 * eting Started * > Additional Broker Disclosures > Additional Broker Disclosures See Additional Broker Disclosures Poduk & Price * * * * * Poduk & Briting * *				
	Optionally upload and add DocuSign fields for additional broker disclosures to be added to your LE package.			
Fees Taxes & Insurance Prorations & Adjustments Preview LE Additional Newrez Disclosures Generate Disclosures	Text Docs 1,pdf			
Request a Change	Name Time Uploaded (CT)			
Submit to UW Clear Choice AUS	No Documents have been uploaded yet.			

111 Edit uploaded document

Click to Review & Edit the document.

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1-	pti	•	-	. 1	۱.			
lO	Dτ	ю	Πā	31				
		-						

🖍 newrez 🛛 Men	u	AllRegs	Contact Us 👻	Begin Live Chat	Q Search by loan number or last name	
	y Borrower Lock Status Loan Stage Required Action ner, Alice 🔓 Unlocked Created Run AUS #2					
1003 >	Getting Started > > Preview LE > Additional Newrez Disclosures > Additional Broker Disclosures				Save	& Next
Product & Pricing						
lock Loan	Be sure to review and/or add Docusign fields to your uploaded documents			_	This feature also	
Newrez LE 🗸						
Getting Started	Optionally upload and add DocuSign fields for additional broker disclosures to be added to your LE package.				allows you to add	
Fees				De	ocuSign fields to t	ho
Taxes & Insurance Prorations & Adjustments					ditional documen	
Preview LE	Drag & Drop Files Here			ad	aitional documen	ιτs.
Additional Newrez Disclosures	Supported file types: PDF, TIF, TIFF, PNG, JPG,	s, JPEG				
Additional Broker Disclosures	Browse					
Generate Disclosures	Uploaded Documents					
Disclosure Tracking	Name Time Uploaded (CT)				Review &	Edit
Request a Change	Test Docs 1.pdf 1:43 PM 9/22/2022					
Submit to UW						

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Step

12 Add DocuSign signature fields and click Save (optional)

Click Save.



- **13 Generate Disclosures**
- Click Generate Disclosure.





Step

14 Clear Global Errors (if applicable)

• Click on error to be taken into H2O to resolve.

~	newrez	Men	าน						AllRegs	Contact Us 🝷	Begin Live Chat Q Sea	ch by loan number or last n	pame (
			ry Borrower Lock Status ner, Alice 🔓 Unlocked	Loan Stage Created	Required Action	Required Action Run AUS +2							
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	ez LE	~	Delivery Method - DocuSign Primary Borrower	Email *		DocuSign Access Code *							
¢ '	Getting Started		Alice Firstimer	testloan@mailina	tor.com	9991 Default is last four digits of SSN							
¢ '	Fees												
Ť	Taxes & Insuran	ce	Previously Requested Disclosu	res									
	Prorations & Adjustments		Disclosure Status			Time Requeste	d (CT)	APR					
T	Preview LE		× Voided			09/22/2022, 2:0	5 PM	-	C	³ View Error Rep	ort		
ſ I	Additional Newr Disclosures		× Voided			09/22/2022, 1:5	4 PM	-	E	³ View Error Rep	ort		
	Additional Broke Disclosures	er											
•	Generate Disclo	sures	Questionnaire										
isclo	sure Tracking		There are no questions that requir	e your attention.									

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Step

15 Save and Revalidate (if applicable)

In H2O, click Save and then Revalidate within Global Errors to clear DV errors.

 In Newrez LE, click Save & Next to save and then Revalidate within Global Errors to clear DV errors.

🖍 newrez	Menu					<u>AllRegs</u>	Contact Us 👻	🖵 Begin Live Chat	Q Search for loan numbe	275	
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Disclosure Tracking Request a Change			Stat	us Validations	Lender Paid 0.750% 9721440684 - Firstimer, Alice		Redesigned 1003		ated 🔓 📆 Closing Eligibility		
Submit to UW			Created • Lock								

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oan Number 9721440684		y Borrower ner, Alice	Click	on the ico	on to coll	lapse or expand the						
1003	>	Getting Started								Δ 1 -	ees	Save & Next
Product & Pricing		_		Global Eri	ror menu	to Revalidate.	-	Global Errors		2 Revalidate		
.ock Loan		Туре							unt must be updated or o		Total	
Newrez LE	~	Type									local	
Getting Started		Appraisal Fe	ee		Lender	Borrower		S	600.00	\$0.00	\$600.00	•••
Fees		Credit Repo	rt Fee		Other	Borrower		S	0.00	\$0.00	\$0.00	
Taxes & Insuran	nce											
Prorations &		Flood Certif	ication		Lender	Borrower		\$	0.00	\$10.65	\$10.65	
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Additional News	rez	Tax Service	Fee		Lender	Borrower		s	0.00	\$93.89	\$93.89	

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	673-5521. NMLS #3013 (www.nmlsconsumeraccess.org). For real estate and mortgage professionals only and not intended for distribution to consumers or	Blueprint for Brokers User Guide	Page 53



Step

16 Generate Disclosures

Click Generate Disclosure.

🖍 newrez 🛛 м	enu			AliRegs	Contac 💭 Begin Live Chat	Q Search by loan number or last name		
	timer, Alice	Loan Stage Required At Created Run AUS	Required Action Run AUS +2					
1003 > Product & Pricing	Getting Started > > Addition	nal Newrez Disclosures > Additi	ional Broker Disclosures > Generate Disclosures			Gener	ate Disclosure	
Lock Loan	Delivery Method - DocuSign							
Newrez LE Getting Started Fees	Primary Borrower Alice Firstimer	Email * testloan@mailinator.com	DocuSign Access Code * 9991 Default is last four digits of SSN					
Taxes & Insurance	Previously Requested Disclosures	5						
Prorations & Adjustments	Disclosure Status		Time Requested (CT)	APR				
Additional Newrez	O Generating We'll let you know once this is d	ione.	09/22/2022, 1:54 PM		oid Disclosure			
Additional Broker Disclosures	Questionnaire		Click on link (if applicable) to answer any pending					
Generate Disclosure	There are no questions that require y	our attention.	Questionnaire questions in H2O.					

17 View and Send Disclosures

• Option to Void Disclosure, View, and Send are available.

🖍 newr	rez Mei	าน							UlDens Contact Us a		Q Search by loan r	number or last name	DMU
Loan Number 9753492553		ry Borrower mer, Alice	Lock Status	Loan Stage Created	Required i p Run AUS	Message ap	opears wh	en dis	sclosure	es are	•	 Disclosure successfully generated for lo #9753492553 Firstimer. Preview & Se 	
1003	>	Getting Started	> > Additio	onal Newrez Disclos	ures > Addi	ready to go out, even when in another						Disclosure	
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Newrez LE	~	Primary Borrower	r -	Email *									
Getting St	tarted	Alice Firstimer		testloan@mailina	tor.com	9991							
Fees						Default is last four digits of SSN							
Pees													
Taxes & Ir	insurance	Previously Rec	quested Disclosure	25									
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mortgage professionals only and not intended for distribution to consumers or other third parties.	L HOUSING M	573-5521. NMLS #3013 (www.nmlsconsumeraccess.org). For real estate and nortgage professionals only and not intended for distribution to consumers or	Blueprint for Brokers User Guide	Page	54



Step

18 View Error Report (if applicable)

 Click View Error Report to review any Mavent errors and warnings that may need to be resolved before attempting to generate disclosures again.

•	newrez	Menu								AllRegs	Contact Us 👻	🖵 Begin Live Chat	Q Search by loan number	r or last name		мШ
Loan No 972144			Borrower er, Alice	Lock Status	Loan Stage Created	Required Ac Required Ac Required Ac Required Ac Required Action Repuised Required Action Requi	uired Action AUS +2									
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Produc	t & Pricing		-													0
Lock Lo	ban		Delivery Meth	od - DocuSign												
Newre	z LE		Primary Borrower		Email *		DocuSign Access Code *									
d G	ietting Started		Alice Firstimer		testloan@mailinat	or.com	9991 Default is last four digits of SSN									
Q FI	ees						enserio estran eños e sou									
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Record of Revisions

Update Date	Updated By	Revision Type	Summary of Changes		
10/7/2022	Brian Rummell	Rebranding	Update screenshots and fonts.		
10/14/2022	Brian Rummell	Monthly Maintenance	Added SEIR Chapter and updated screenshts.		



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