Newfi CORRESPONDENT

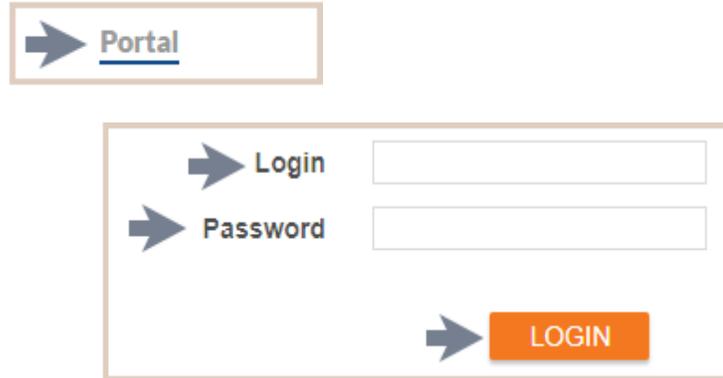# Correspondent Portal Quick Start Guide

Log-in

Go to www.newficorrespondent.com

1. Click **Portal** button
2. Newfi Lender Portal appears
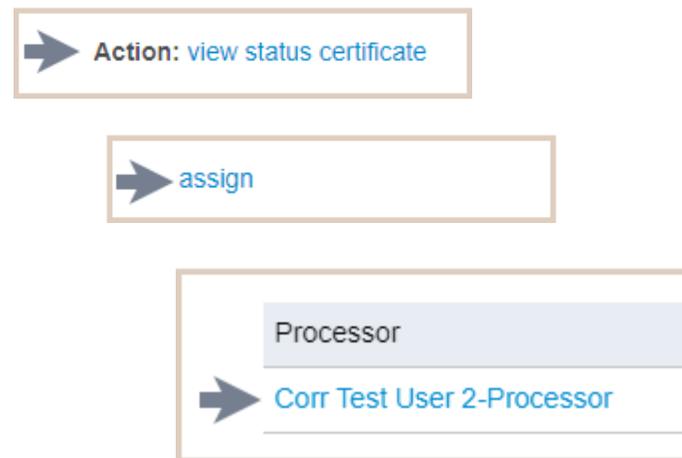3. Enter **Login ID** and **Password**
4. Click **LOGIN**

Create New Loan

Select **Create New Loan** from menu

1. Click **Import Loan File**
2. Select **Import MISMO 3.4**
3. Click **CHOOSE FILE** button
4. Browse to select 3.4 file
5. Check "*I understand…*" **check box**
6. Click **IMPORT** button

Check Status and Assign Agents

Select **Status and Agents** from menu

1. Click **view status certificate** to view or print status certificate
2. Click **assign** to associate Correspondent agents: **Processor, Secondary, Post-Closer**
3. Select desired agent name

02/

Complete Application Information

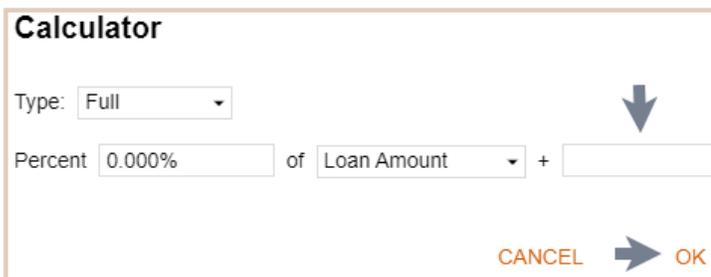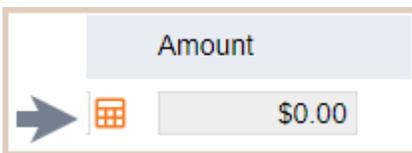Select **Application Information** from menu

1. Navigate thru **Borrowers, Assets, Liabilities, REOs, Loan & Property, Declarations, Demographic, Originator, Lender Loan Info, Continuation, and Income Editor**
2. Enter any missing/incorrect information

Borrowers ⌃   Assets   Liabilities   Lender Loan Info   Continuation ⌄

Enter Closing Costs

Select **Closing Costs** from menu

1. Enter fees in **Borrower-Responsible Closing Costs** section:
   a. Click **calculator icon** to open editor
   b. Enter fee amount
   c. Click **OK**

Amount

$0.00

Calculator

Type: Full

Percent 0.000% of Loan Amount +

CANCEL   OK

Price/Register Loan Program

Select **Pricing** from menu

Property & Loan Info tab:
1. Ensure all property and loan options are correct
2. Select **Self-Employed?**

Applications tab:
1. Select **Manually Enter Credit Report** – Click **Enter Credit** button
2. Manually **enter borrower's credit scores** Click **Enter Credit** button

PML Options tab:
1. Select preferred **Term, Amortization Type, Product, Payment**
2. Click **Run Price My Loan** button
3. Locate preferred program and rate
4. Click **register**

Request Lock (can be locked after registration)
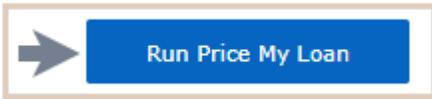
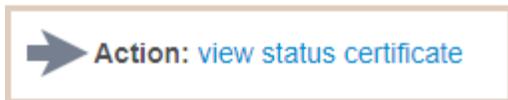Follow steps above and select **request lock** instead of **register.**

1. Click **Run Price My Loan** button
2. Locate preferred program and rate
3. Click **request lock**

Loan Information

Select **Loan Information** from menu

- View **Loan Terms**, **Additional Information, FNMA Addendum, FHLMC Addendum**
- Click **view registration certificate** to view or print registration certificate

View Rate Lock Info

Loan Program

30 YEAR FIXED - CORR RAINIER - 12M BK ST

Loan Status

Document Check

Lock Status

Locked

Rate Locked Date	Lock Period
5/2/2023	30 days

Rate Lock Comments

Lock Expiration Date	Lock Expiration Comments
6/1/2023	

EXTEND RATE LOCK

Select **Rate Lock** from menu

- View **Loan Program, Loan Status, Lock Information, Originator Compensation Information**
- NOTE: Secondary user can view pricing breakdown and adjustments.

Upload Initial Submission File

Select **E-docs** from menu

1. Drag and drop files or click **OR SELECT FILES TO UPLOAD** button
2. Click **Select Doc Type**
3. Select ****CORRESPONDENT UPLOAD**
4. Select ***1 CORR INITIAL FILE (CREDIT DOCS)**
5. Click **UPLOAD DOCS** button

![Newfi Correspondent logo]

(If Suspended) Upload Suspense Conditions

1. Select **Conditions** from the menu.
2. Click **OR SELECT FILES TO UPLOAD** button for desired condition.

Note: Each document should be uploaded to its corresponding condition.

3. Browse to select document.
4. Click **Select Doc Type.**
5. Select ****CORRESPONDENT UPLOAD.**
6. Select ***2 CORR CONDITION.**
7. Click **UPLOAD DOCS** button.

Upload Underwriting/Pre-Closing Conditions

1. Select **Conditions** from the menu.
2. Click **OR SELECT FILES TO UPLOAD** button for desired condition.

Note: Each document should be uploaded to its corresponding condition.

3. Browse to select document.
4. Click **Select Doc Type**
5. Select ****CORRESPONDENT UPLOAD**
6. Select ***2 CORR CONDITIONS**
7. Click **UPLOAD DOCS** button

Upload Purchase Package (final credit & property docs – not disclosures)

☁
Drag and Drop Files Here to Upload

OR SELECT FILES TO UPLOAD

[select Doctype] scan barcodes

Folder

**CORRESPONDENT UPLOAD

Doc Type

*1 CORR INITIAL CREDIT FILE

*2 CORR CONDITIONS

*3 CORR CLOSED LOAN FILE

UPLOAD DOCS

Select **E-docs** from the menu

1. Drag and drop files or click **OR SELECT FILES TO UPLOAD** button
2. Click **Select Doc Type**
3. Select ****CORRESPONDENT UPLOAD**
4. Select *3 CORR CLOSED LOAN FILE (PROPERTY, FINAL CREDIT)**
5. Click **UPLOAD DOCS** button

Upload Purchase Package (disclosures/closing legal docs – not credit docs)

Select **E-docs** from the menu

1. Drag and drop files or click **OR SELECT FILES TO UPLOAD** button
2. Click **Select Doc Type**
3. Select ****CORRESPONDENT UPLOAD**
4. Select ***3 CORR CLOSED LOAN FILE (DISCLOSURES, CLOSING DOCS)**
5. Click **UPLOAD DOCS** button
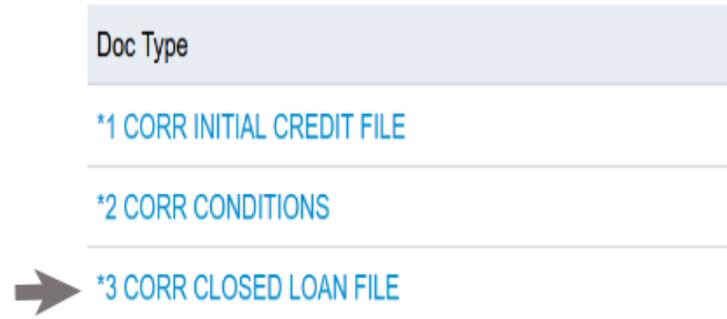
Upload Pre-Purchase Conditions

1. Select **Conditions** from the menu.
2. Click **OR SELECT FILES TO UPLOAD** button for desired condition.

Note: Each document should be uploaded to its corresponding condition.

3. Browse to select document.
4. Click **Select Doc Type.**
5. Select ****CORRESPONDENT UPLOAD.**
6. Select ***2 CORR CONDITION.**
7. Click **UPLOAD DOCS** button.

View Approval/Suspense Letters/Lock Confirmation/Purchase Advice

Select **EDocs** from menu

- Click **Document List**
- Click **View PDF** to view **Lock Confirmation & Certificate**, **Underwriting Suspense**, **Underwriting Approval**, **Purchase Conditions**, **Purchase Clearance, and Purchase Advice**

Note: Documents will also be sent via email.

Status	Folder
view PDF	CORRESPONDENT PURCHASE ADVICE
view PDF	UNDERWRITING SUSPENSE
view PDF	UNDERWRITING APPROVAL
view PDF	**CORRESPONDENT UPLOAD
view	CORRESPON
view PDF	LOCK CONFIRMATION & CERTIFICATES