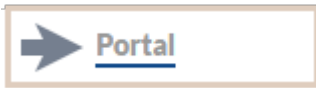
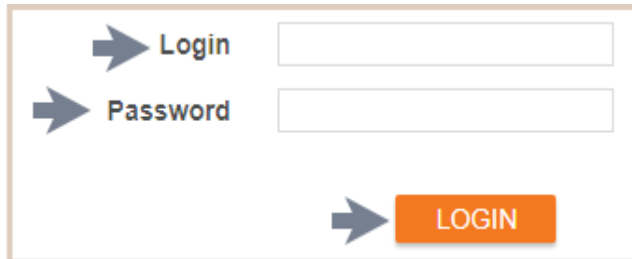


## Log-in

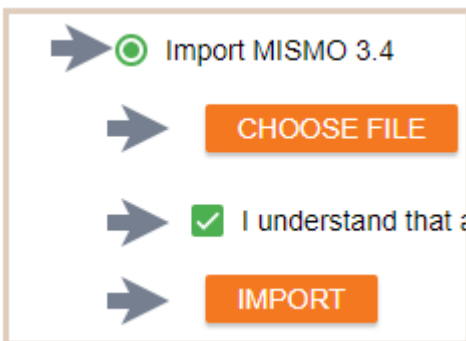


Go to [www.newficorrespondent.com](http://www.newficorrespondent.com)



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

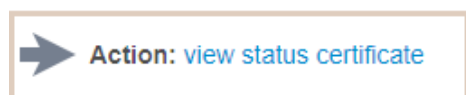
## Create New Loan



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

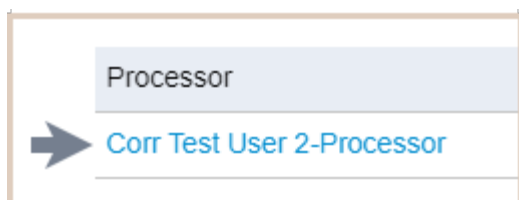
## Check Status and Assign Agents



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



## 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



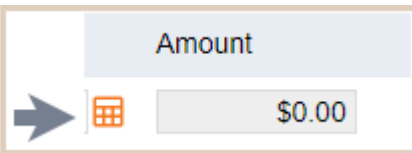
Borrowers ^ Assets Liabilities Lender Loan Info Continuation v


## Enter Closing Costs

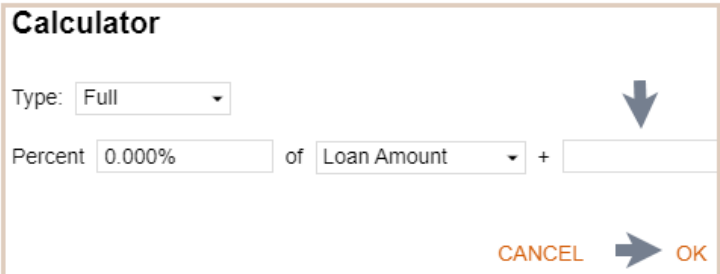
Select **Closing Costs** from menu

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 v

Percent 0.000% of Loan Amount v +

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?**

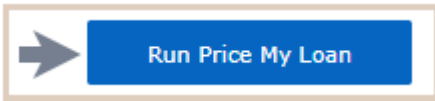
**Applications** tab:

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**.

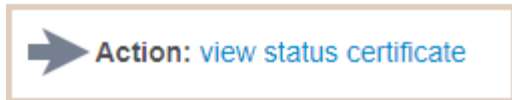


1. Click **Run Price My Loan** button
2. Locate preferred program and rate
3. Click **request lock**

**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

5/2/2023

Lock Period

30 days

Rate Lock Comments

Lock Expiration Date

6/1/2023

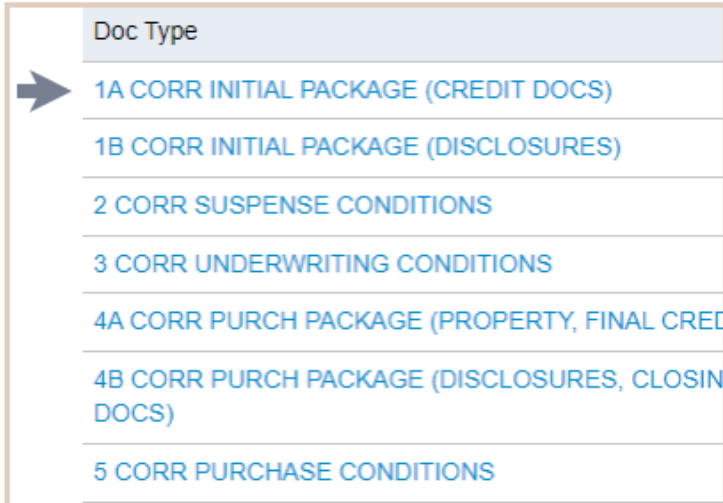
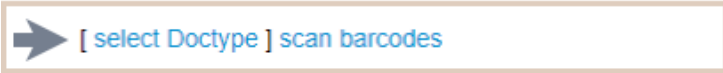
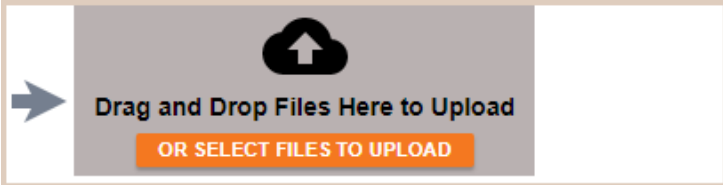
Lock Expiration Comments

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.

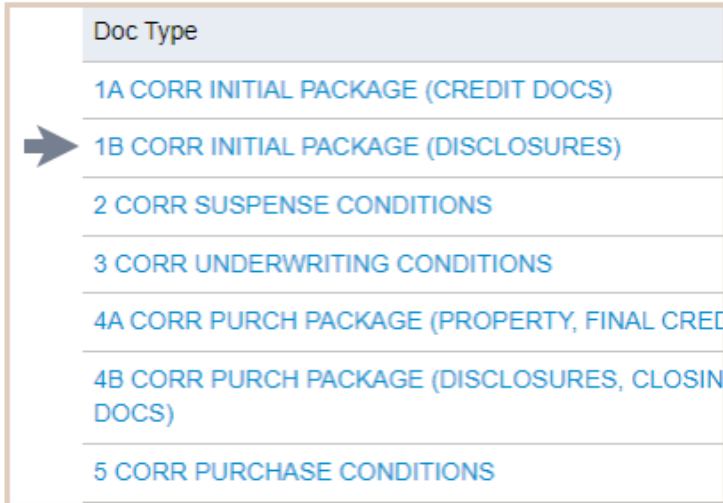
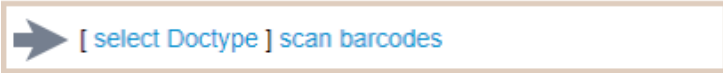
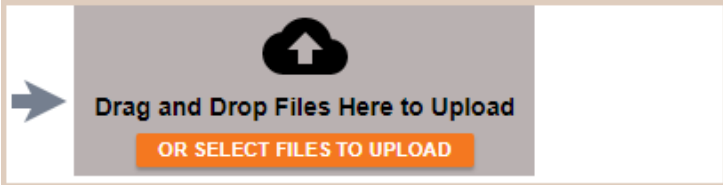
### Upload Initial Credit Submission File (credit package only – not disclosures)



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 **1A CORR INITIAL PACKAGE (CREDIT DOCS)**
5. Click **UPLOAD DOCS** button

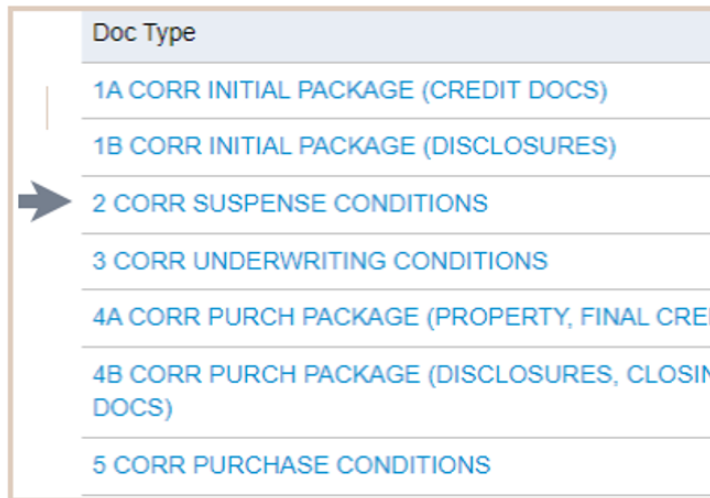
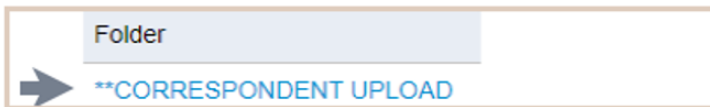
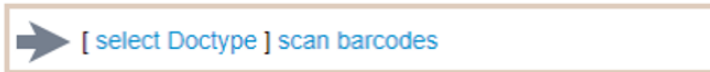
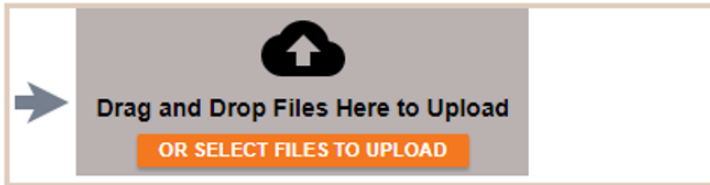
## Upload Initial Disclosures File (disclosures only – not credit package)



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 **1B CORR INITIAL PACKAGE (DISCLOSURES)**
5. Click **UPLOAD DOCS** button

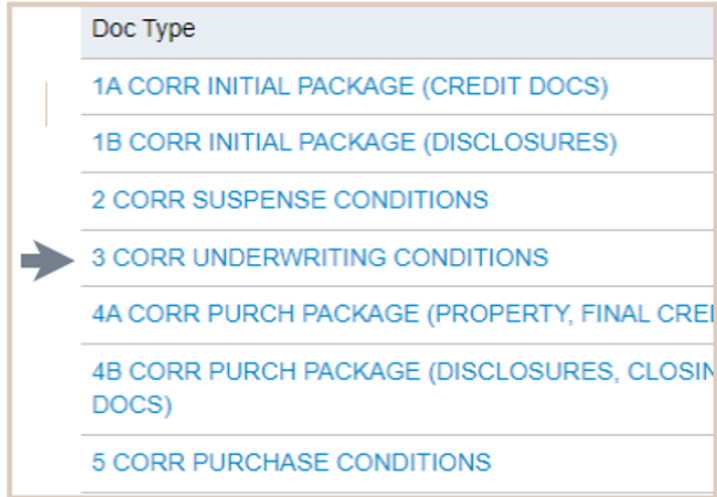
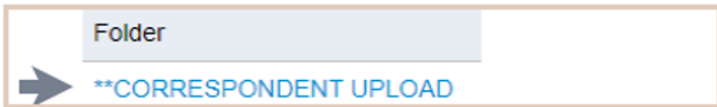
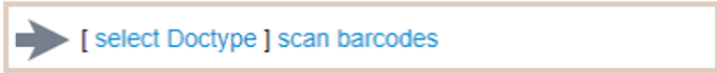
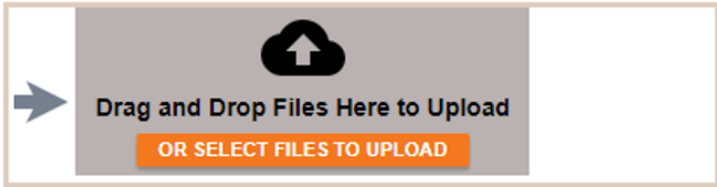
**(If Suspended) Upload Suspense Conditions**



1. Select **Conditions** from the menu
2. Click **OR SELECT FILES TO UPLOAD** button for desired condition
3. Browse to select document
4. Click **Select Doc Type**
5. Select **\*\*CORRESPONDENT UPLOAD**
6. Select **2 CORR SUSPENSE 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
3. Browse to select document
4. Click **Select Doc Type**
5. Select **\*\*CORRESPONDENT UPLOAD**
6. Select **3 CORR UNDERWRITING 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

- 1A CORR INITIAL PACKAGE (CREDIT DOCS)
- 1B CORR INITIAL PACKAGE (DISCLOSURES)
- 2 CORR SUSPENSE CONDITIONS
- 3 CORR UNDERWRITING CONDITIONS
- 4A CORR PURCH PACKAGE (PROPERTY, FINAL CRED
- 4B CORR PURCH PACKAGE (DISCLOSURES, CLOSIN DOCS)
- 5 CORR PURCHASE CONDITIONS

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 **4A CORR PURCH PACKAGE (PROPERTY, FINAL CREDIT)**
5. Click **UPLOAD DOCS** button

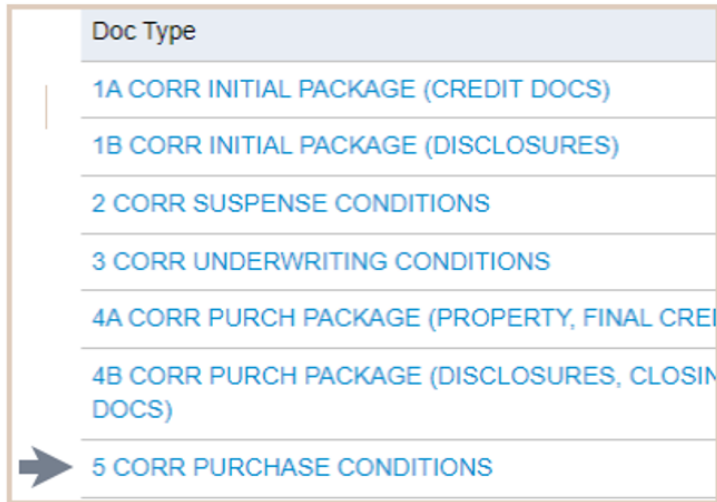
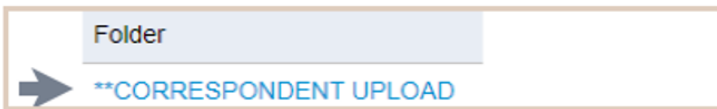
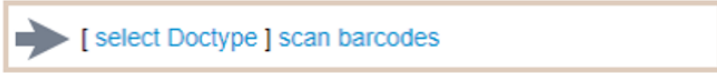
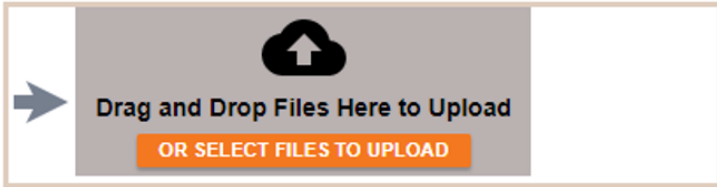
### Upload Purchase Package (disclosures/closing legal docs – not credit docs)

The screenshot shows a multi-step upload process. At the top, there is a grey box with a cloud icon and the text "Drag and Drop Files Here to Upload" and an orange button labeled "OR SELECT FILES TO UPLOAD". Below this is a dropdown menu for "Doctype" with the text "[ select Doctype ] scan barcodes". The next step is a "Folder" selection dropdown with the option "\*\*CORRESPONDENT UPLOAD" selected. This is followed by a "Doc Type" dropdown menu with several options: "1A CORR INITIAL PACKAGE (CREDIT DOCS)", "1B CORR INITIAL PACKAGE (DISCLOSURES)", "2 CORR SUSPENSE CONDITIONS", "3 CORR UNDERWRITING CONDITIONS", "4A CORR PURCH PACKAGE (PROPERTY, FINAL CRED", "4B CORR PURCH PACKAGE (DISCLOSURES, CLOSIN DOCS)", and "5 CORR PURCHASE CONDITIONS". The "4B" option is highlighted with a blue arrow. At the bottom, there is an orange button labeled "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 **4B CORR PURCH PACKAGE (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
3. Browse to select document
4. Click **Select Doc Type**
5. Select **\*\*CORRESPONDENT UPLOAD**
6. Select **5 CORR PURCHASE CONDITIONS**
7. Click **UPLOAD DOCS** button

View Approval/Suspense Letters/Lock Confirmation/Purchase Advice

➔ Document List

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**

	Status	Folder
➔ view PDF		CORRESPONDENT PURCHASE ADVICE
➔ view PDF		UNDERWRITING SUSPENSE
➔ view PDF		UNDERWRITING APPROVAL
view PDF		**CORRESPONDENT UPLOAD
		NT UPLOAD
view i .		CORRESPONDENT
➔ view PDF		LOCK CONFIRMATION & CERTIFICATES