

## Production Review Checklists Summary

### Summary

Before a loan is approved, the Flex team completes the online Production Review Checklists for the Production managers to review. All checklist items have three option buttons (Yes, No, or N/A). One option must be selected for each item. The checklists are saved online for quick and easy retrieval and to ensure all outstanding items are reviewed before a loan can be approved.

Loan-specific information and associate information fields are automatically populated on the checklists from Empower. In addition, Strategic Planning and Production Management can generate daily reports for loans based on the checklists.

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[Revision History](#)

03/19/07: First published (new topic).

### Topics

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[Viewing or Editing Production Review Checklists](#)

# About Production Review Checklists

## Overview

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Before a loan is approved, the Flex team completes the online Production Review Checklists for the Production managers to review to ensure all documents are included and completed. All checklist items have three option buttons (Yes, No, or N/A). One option must be selected for each item. The checklists are saved online for quick and easy retrieval and to ensure all outstanding items are reviewed before a loan can be approved. Loan-specific information and associate information fields are automatically populated on the checklists from Empower.

In addition, Strategic Planning and Production Management can generate daily reports for loans based on the checklists to determine which loans are available for approval.

The following checklists are available online:

- Docs Out Review Checklist—items the closer must complete before the loan is ready for funding.
- Funding Checklist—items the funder must complete before the loan is ready for Underwriting.
- Underwriting Checklist—items the underwriter must complete before the loan is ready for approval.

## Rules

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- All items on the checklists must be selected with either a Yes, No, or N/A option.
- A checklist can only be updated on the day it was created.

## Guidelines

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- Type supporting comments for an item, if appropriate.

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# Creating New Production Review Checklists

Before a loan is approved, the Flex Team completes the appropriate online Production Review Checklist. All checklist items have three option buttons (Yes, No, or N/A). One option must be selected for each item before the checklist can be submitted for review. This saves time and eliminates errors.

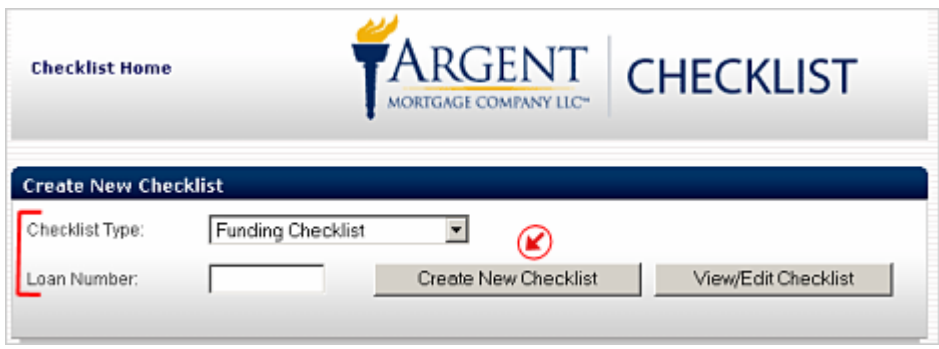
**Important:** All checklist items must be answered, but comments are optional.

## Procedure

### Flex team associates

#### To create a new production review checklist:

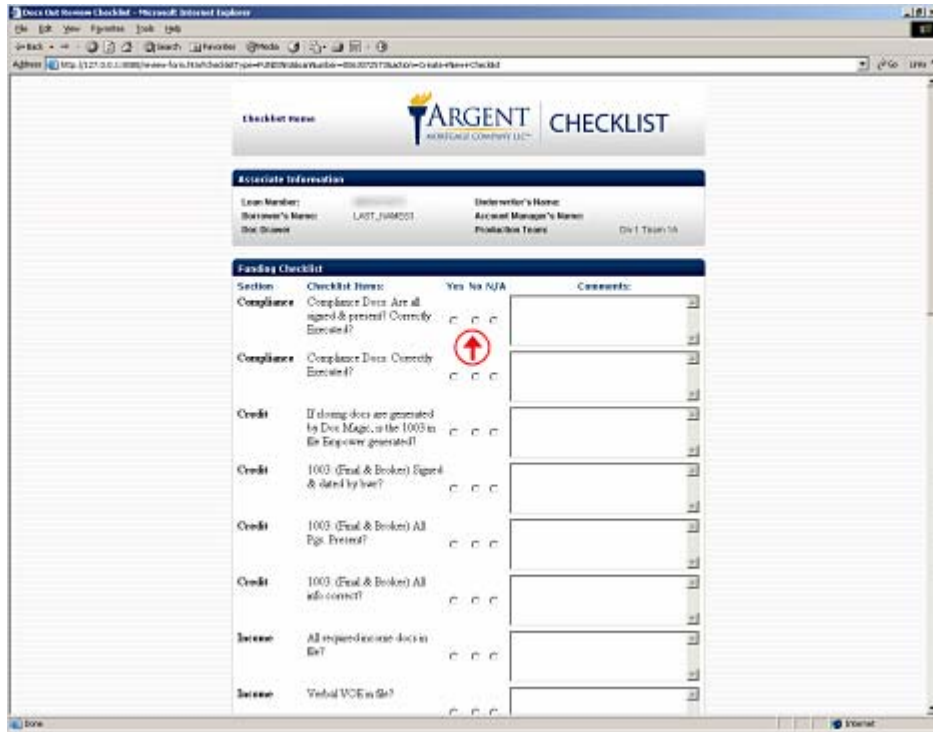
1. In the Internet Explorer **Address** bar, type **http://www.filereviewchecklist.com** (the URL to access the checklists).
1. On the [Checklist Home](#) page, do the following:



Field	Action
Checklist Type	Select one of the following: <ul style="list-style-type: none"> <li>• <b>Docs Out Review Checklist</b>—items the closer must complete before the loan is ready for funding.</li> <li>• <b>Funding Checklist</b>—items the funder must complete before the loan is ready for Underwriting.</li> <li>• <b>Underwriting Checklist</b>—items the underwriter must complete before the loan is ready for approval.</li> </ul>
Loan Number	Type the 10-digit <b>Loan Number</b> .

1. Click **Create New Checklist**.
3. When the [checklist](#) opens, select one of the following options for each checklist item:

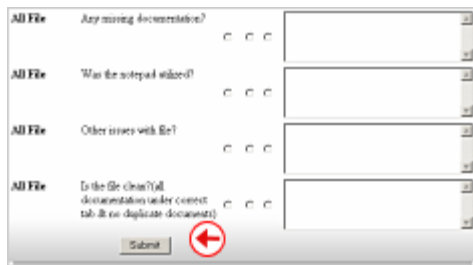
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- **Yes**—if the item is correct or is resolved for the loan.
- **No**—if the item is not correct or is unresolved for the loan.
- **N/A**—if the item is not applicable for this loan.

**1 FYI:** The **Associate Information** section includes fields based on which checklist you selected, such as the loan number, borrower's name, underwriter's name, doc drawer number, account manager's name, and Production Team number. These fields automatically populate from Empower.

3. In **Comments**, type any additional information as needed.
4. After all checklist items are complete, click **Submit**.



5. Repeat the steps above to create additional checklists.

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## Viewing or Editing Production Review Checklists

Because reports are run daily, any changes to a Production Review Checklist must be made on the same day. A checklist may only be viewed on the next day.

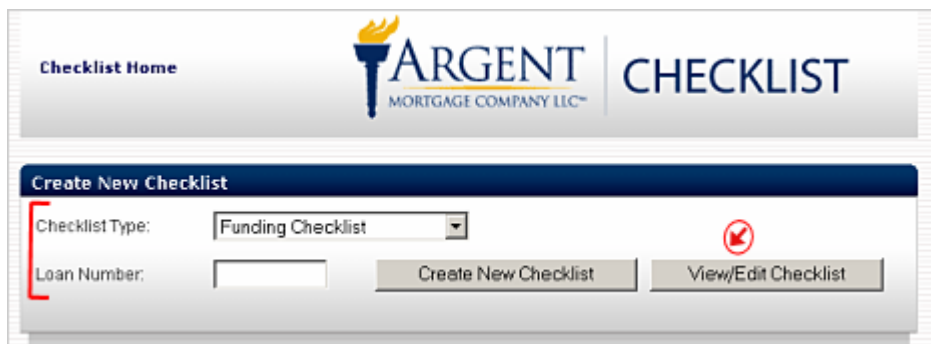
**Important:** A checklist can only be updated on the day it was created.

### Procedure

#### Flex team associates

#### To view or edit a production review checklist:

1. In the Internet Explorer **Address** bar, type **http://www.filereviewchecklist.com** (the URL to access the checklists).
1. On the [Checklist Home](#) page, do the following:



Field	Action
Checklist Type	Select one of the following: <ul style="list-style-type: none"><li>• <b>Docs Out Review Checklist</b>—items the closer must complete before the loan is ready for funding.</li><li>• <b>Funding Checklist</b>—items the funder must complete before the loan is ready for Underwriting.</li><li>• <b>Underwriting Checklist</b>—items the underwriter must complete before the loan is ready for approval.</li></ul>
Loan Number	Type the 10-digit <b>Loan Number</b> .

1. Click **View/Edit Checklist**.
2. If editing the checklist, change the items as needed, and then click **Submit**.

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