

Wednesday, August 17, 2022

Bulletin #2022-B-018

## NOTICE TO ALL WHOLESALE CUSTOMERS

### Change of Circumstance Request - Process IMPROVEMENT!

#### Effective Today, August 17, 2022.

To better serve our clients, we introduce our new *Online Change of Circumstance submission* process. There are only 7 required fields. You can recycle our COC form since there is no need to complete the COC PDF form and upload it. It is online and available now for all loans in process.

#### As the User, you will simply:

- Login to our website
- Locate the loan in the pipeline
- Select **Change of Circumstance** screen under **Forms & Docs**.

#### Complete the steps below:

1. Loan Number – please enter the loan number into the online form.
2. Borrower Name – please enter the borrowers name into the online form.
3. As a reminder, please remember to complete any changes in OB first.
4. Change Request – select the type of change being requested.
5. Details of request – input the details of your request. Remember to include if any fees are changing because of this change. For example, loan amount change to \$400,000. Origination fee \$1,000 from \$950.
6. Name and Email Address – input your name and email into the online form for contacting purposes.
7. Submit Change Request – input the date that you are submitting the change request. I.E Today's date, in the following format mm/dd/yyyy. This action will notify the underwriter that a COC has been submitted.

Once steps 1-7 are complete select the **Save/Close** option at the bottom of the form.  
You no longer need to upload any additional documentation.

Please [CLICK HERE](#) for the Online COC Request Process document located in the Resource Center

We continue working to improve our submission process to create a better experience for you.

If you have any questions, please contact your [Account Executive or Client Relations Representative](#).