SET UP COORDINATOR
OPENER/CLOSER

TOP 3 RESPONSIBILITIES:

1. **Disclosing**
   - **Metric** – Disclose 4 hours from READY TO DISCLOSE

2. **Set up for Processing Submission**
   - **Metric** – Submit to Processing w/in 24 hours of Discs Received

3. **Loan Manager Support**

Overall Metrics - File turned into Set Up within:
   - **48 hours from Sending Disclosures**
   - **4 days from receiving Contract**

1. Disclosing:
- Verify Encompass Matches the Contract in Price and all associated agents
- Update Itemization w/ any concessions, lender credits, proper fees, etc
- Complete and send Disclosures based on branch timelines and Milestones Manual
   - Disclosures – 4 Business Hours
- Update Jungo for all Contract Details according to "Contract Received" Checklist
- Disclose to borrower, make welcome call immediately and walk through process and timeline
- Assists Team LO by following up on packages to get all disclosures and documents in. Use 3/2

2. Set Up for Processing Submission:
- Complete the set up process according to branch timelines
   - Set Up: 24 hours
      - Stack and upload docs, update Jungo to "Loan in Process", prep for Processing

- Initial Order outs and submit file to Processor within 24 hours
- Follow up on order outs – calendar tickler file w/in 24hours
  - Final paperwork received/Do a QC Review
    - Be sure docs received matches checklist
    - Organize assets/income
  - Complete all VO's, third party orders, verifications, etc.
    - MOST IMPORTANT: Disclosures, Appraisal and 4506-T
  - Order verbal voe's up front and prior to close
  - Refer client to our HOI partner and to Utility Concierge through Jungo
  - Understand process for uploading legible documents into Encompass properly based on Processing needs

3. Loan Manager Support:
  - Be the support person for all the processing staff, including:
    - Anything that may help them handle more loans
    - Help off load processing with less complicated and timely tasks so to increase their productivity and efficiency
    - Clear Conditions with 3rd parties
  - Closing Checklists – prepares and puts in system for Clear to Close
  - Update Jungo according to Branch Standards and Milestones Manual

General Expectations:
  - Understand and use all tools needed to perform duties (including, Jungo, Encompass, Google Drive, etc)
  - Have a basic knowledge of the mortgage industry so the duties of this position can be performed. Being able to speak the language and understand key terms are important to minimize mistakes
  - Be a Team Player. Be Positive, Proactive and a Problem Solver