

Learning & Development

Borrower Esigning

Revised 03.22.2021

Pre-Approval

Pre-Approval is an application type you can select during loan creation. Once a loan has been created, the type of application cannot be changed. Be aware, entering any address after the loan has been created will trigger the loan type to become an application.

1. Pre-Approval Application Type:

- a. Log In to Octane.
- b. Click Add Loan.
- c. Select Pre-Approval for Application Type.
- d. **Fill** Remaining information.
- e. **Upload** 3.4.
- f. Leave Subject Property Address blank until you have a contract.

Need help?

- Wholesale Support (855) 399-6242
- Resource Library

Cardinal Financial Company Confidential - This information is provided to mortgage and real estate professionals only and is not intended nor authorized for consumer distribution.