

Octane

Welcome to the Octane Express Tutorial! Watch the Octane Express video series and use this document as a reference guide while learning loan process.

Introduction

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- 1. Open Google Chrome
- 2. Upload Octane Bookmarks **(Click Here)**
- 3. Gather Information Required for Disclosures **(Click Here)**

Loan Registration

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- 1. Upload Loan
- 2. Authorize & Request Credit
- 3. Import Terms
- 4. Complete Disclosure Preparation Workflow, Send Loan Key(s)
- 5. Gather Documents Required for Initial Underwrite **(Click Here)**

Initial Underwrite

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- 1. Change Document Filter - 'Prior to Approval - Unapproved by Provider'
- 2. Quality Assurance - Review Income & Assets
- 3. Fulfill Conditions - Upload Documents & Fulfill Requirements
- 4. Submittal Workflow

Processing

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- 1. 3rd-Party Services **(Click Here)**
- 2. Review Rejected Conditions
- 3. Fulfill 80% of Remaining Conditions
- 4. Resubmittal Workflow

Closing

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- 1. Initial Closing Disclosure Requirements
- 2. Final Closing Disclosure Requirements
- 3. Funding Requirements