

Solution home Lender / Originator Applications









Editing an Application

Modified on: Mon, 17 Jul, 2023 at 3:54 PM

Editing an Application

Sometimes it is necessary to edit an application that has already been submitted or continue an application in progress that could not be completed in one sitting. Lenders cannot update information on any application which has moved to Approved/Declined or Cancelled. However, they can update their **Account Information** (<https://o.comergencesupport.com/en/support/solutions/folders/8000058324>) at any time.

On the **Home page** (<https://o.comergencesupport.com/en/support/solutions/articles/8000016242-lender-home-page>), find the application that requires editing. Click the button titled "Edit Application" on the right side of the application.

 <p>Optimal Blue Wholesale</p> <p>Date Created: 07/13/2023 Expiration Date: 09/11/2023 Assigned: Unassigned App Type: New</p>	<p>Application Process Actions</p> <ul style="list-style-type: none">  Questionnaire  Account Update  Documents  Ownership  Submit 	<p></p> <p>Not Submitted Expires in 59 days</p> <p> Edit Application</p> <p><input type="button" value="Upload Documents"/></p> <p>Print View</p>
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Users are immediately presented with the Application Details. Included in the Application Details are all investor specific requirements, such as any custom questionnaires and ownership requirements, as well as a list of all account sections with a last 'Reviewed By' date/time stamp. Select the 'Update' option to the right of any that require review or an update.

(<https://o.comergencesupport.com/en/support/solutions/folders/8000058324>) **Please Note:** Pay attention to the last reviewed date as a section may require an update, even if it shows 'Completed' in the past. Each account section requires a minimum number of days to be reviewed. For example, affiliates is required to have an acknowledged review every 180 days. For more information, visit the detailed help articles on each **Client Account Sections** (<https://o.comergencesupport.com/en/support/solutions/folders/8000058324>).

Application Details

Optimal Blue Correspondent

Account Information	Status	Completed Date	Reviewed By
Company Information	Completed	N/A	N/A
Questionnaire	In Progress	-	-
Affiliates	Review Required	-	-
Agency	Review Required	-	-
Insurance and Bonds	Review Required	-	-
Investors	Review Required	-	-
Technology & Operations	Review Required	-	-
Underwriting	Review Required	-	-
Warehouse	Review Required	-	-
Ownership	Completed	N/A	N/A

Account Executive	Email	Phone
✎ Jason Stephenson	B69AJason.stephenson@bkfs.com	(198) 144-5792

All sections must show 'Completed' for the 'Submit Application' button to be enabled.

After selecting 'Update' to the right of any section users are directed to the Account section or Questionnaire (if 'Update' is selected for the questionnaire). Users can then 'Edit' and make any necessary updates OR select the 'Review' option to acknowledge the section as true and accurate.

Please Note: After completing the questionnaire, lenders must select 'Done' to move the questionnaire to 'Completed'. Any updates to a completed questionnaire will move the questionnaire back to an 'In Progress' status until the 'Done' button is selected to move the questionnaire back to 'Completed'.

Select the 'Back to Application' button to return to the Application Details and proceed with any additional outstanding requirements or updates.

Optimal Sales Demo
NMLS ID: 130

Account Information

- Affiliates
- Agency
- Insurance & Bonds
- Investors
- Technology & Operations
- Underwriting
- Warehouse

Certifications

Financials **Beta**

Production **Coming**

Questionnaires

Agency **Out of date and requires review**

Type of Approval	Approval Date	End Date	ID Number
VA			
VA (Automatic Approval)			
FHA	03/01/2019		12347
FHA (Direct Endorsement Designation)			
USDA	08/04/2020		3456
Fannie Mae			
Freddie Mac			
GNMA			

Back to Application

Mark Reviewed Edit

Use the pencil icon to select an assigned Account Executive. If unknown, select unassigned.

TIP: If the investor has preselected your representative the Account Executive field may be locked down. Please contact the lender/investor if you wish to change the representative.

Account Executive	Email	Phone
Unassigned	-	-

If the investor is requiring documents as part of the application, lenders will then be redirected to the required documents screen which will be pre-filtered to the specific investor and channel the lender is applying to. This list of required documents is generated by the Investor. For more information, visit [Uploading Requested Documents](#).

(<https://o.comergerencesupport.com/support/solutions/articles/8000016256-uploading-requested-documents>)

Please Note: Company Information section: You can only make changes to the Company Phone, Company Fax, Business Tax ID, MERS ID, Website, FDIC/NCUA Certificate fields. If you need to update any other information here, you'll need to do that with the NMLS and your comergerence.com profile will automatically update.

More articles

- [Starting and Completing an Application](#)
- [Applying to Investors](#)