Solution home **Lender / Originator** **Applications**

Editing an Application

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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.

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)**.

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.

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.

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.comergencesupport.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 comergence.com profile will automatically update.

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