PR | Mortgage Investment

PR Mortgage Investment
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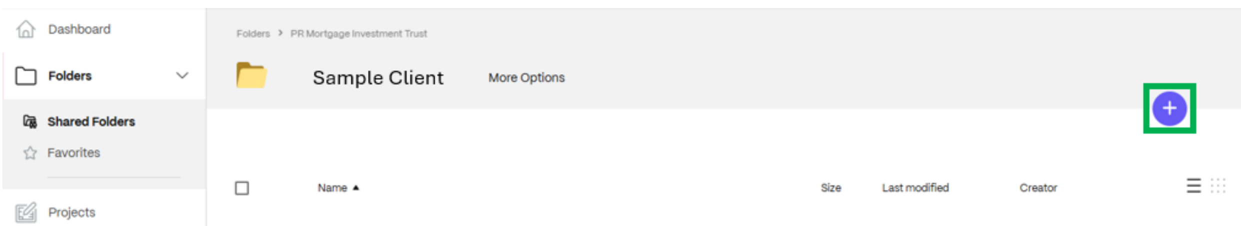
HOW TO SUBMIT DOC REQUEST - FULFILLMENT

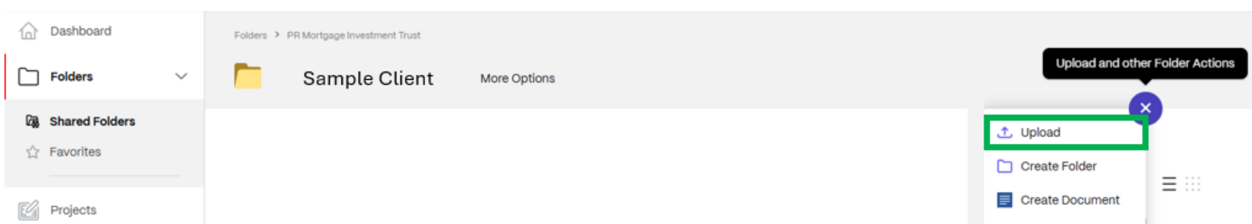
1. Go to www.shankspc.com.

2. Click on the Client Portal tab on the top navigation bar, this will open a new tab in your browser. This is the Doc Request cloud (ShareFile).

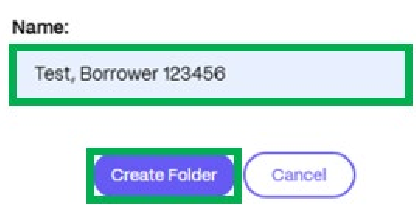
3. To create a borrower folder, select the plus sign icon on the right-hand side.



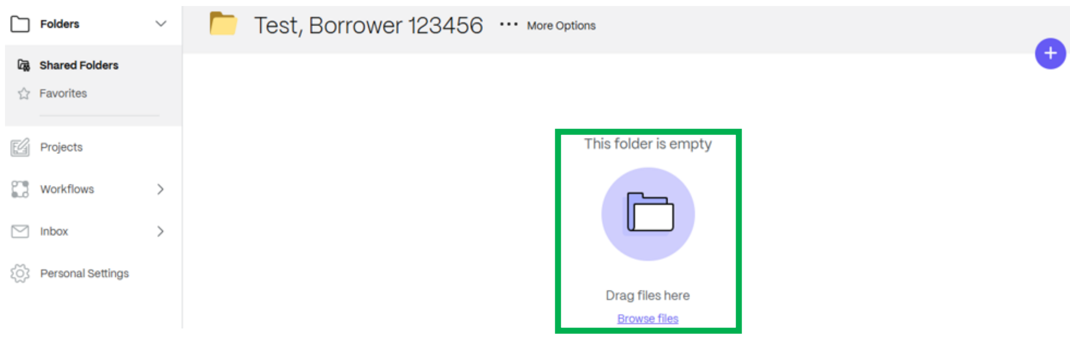
4. Once the drop-down menu appears, click Create Folder.



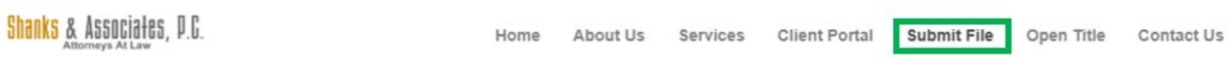
5. Input your borrowers' last name, first name & loan number in the Name field, then select Create Folder. (*File Naming Convention: Last name, First name and Loan number*).



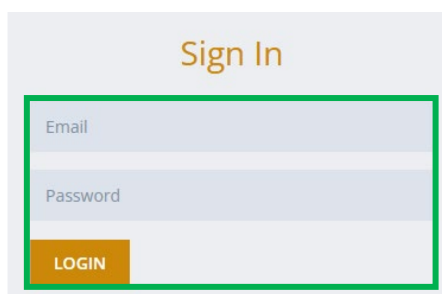
6. Upload all required items to the borrower folder as individual pdfs. You may drag and drop the files or use the Browse files link. Please name the file(s) appropriately. (*Example: If 1003 is 5 pages then it should be saved as one pdf with all pages, not separate pdfs for each page, and then labeled as 1003*).



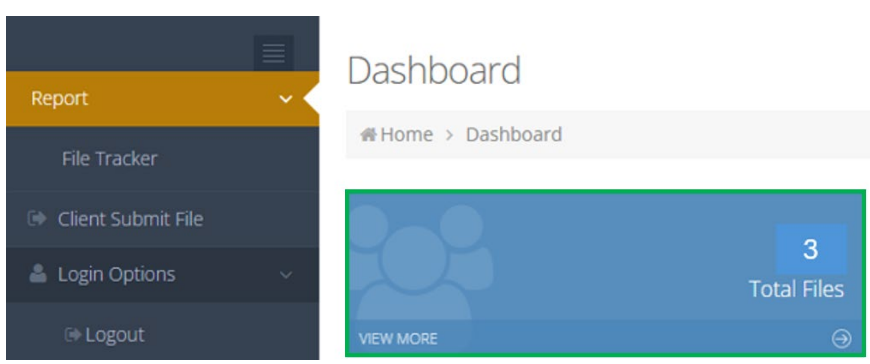
7. Once your documents are uploaded, go back to our website and click the Submit File tab on the top navigation bar, which will take you directly to the login page.



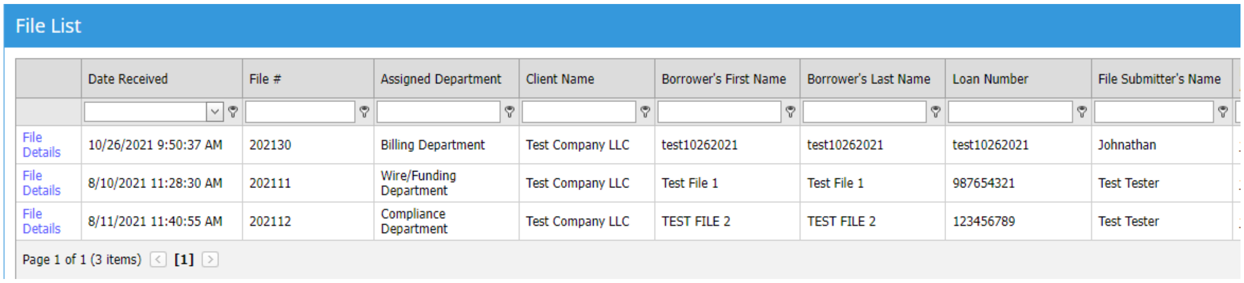
8. Log in with your credentials.



9. To view a list of all files, click on the dashboard preview.



10. The file list will indicate which department each file is in as well as the assigned closer. You will also receive an assignment email once the file is initially submitted.

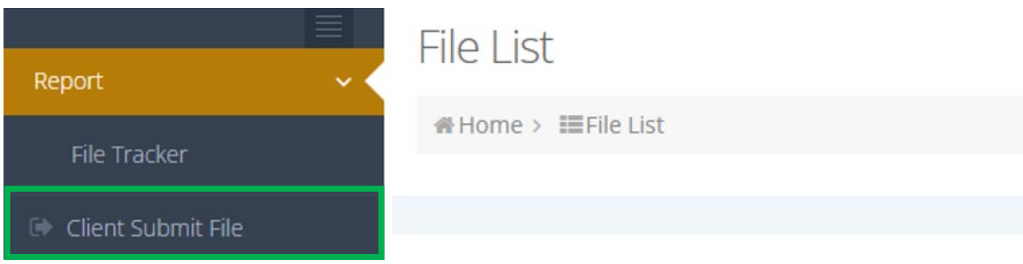


File List

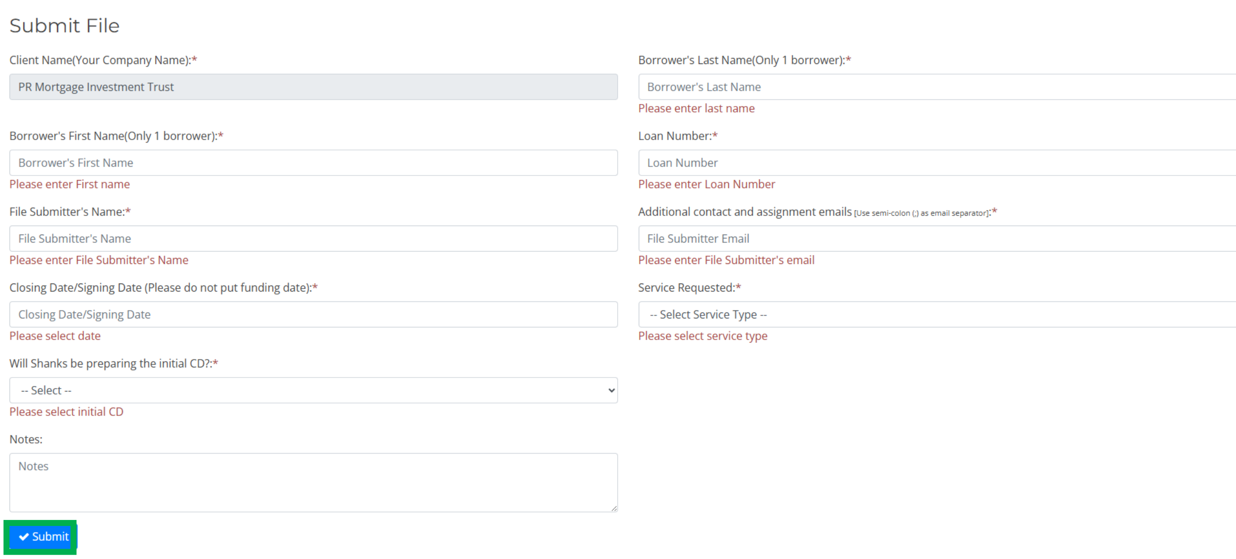
	Date Received	File #	Assigned Department	Client Name	Borrower's First Name	Borrower's Last Name	Loan Number	File Submitter's Name
File Details	10/26/2021 9:50:37 AM	202130	Billing Department	Test Company LLC	test10262021	test10262021	test10262021	Johnathan
File Details	8/10/2021 11:28:30 AM	202111	Wire/Funding Department	Test Company LLC	Test File 1	Test File 1	987654321	Test Tester
File Details	8/11/2021 11:40:55 AM	202112	Compliance Department	Test Company LLC	TEST FILE 2	TEST FILE 2	123456789	Test Tester

Page 1 of 1 (3 items) [1]

11. To submit a file, click on Client Submit File tab on the left-hand navigation panel and a new tab will open.



12. Fill out all required information (*) and click submit. Include all emails to receive communication for each respective file in the additional contact and assignment emails field. (*Please note: Do NOT include spaces between semi colons*).



13. Once submitted, the system will give you an option to complete another submission.

14. Once a closer has been assigned to a file, the user who submitted the doc request and anyone listed as an additional contact will receive notification.

15. Please monitor your spam/junk folders when you submit your first Doc Request as it is very common for system generated emails to go to spam/junk folders for new users.

ADDITIONAL HELPFUL INFORMATION

- Please use the following emails addresses on different levels of the process:
  - closingrequest@shankspc.com: Please email your assigned closers when needed. This email can be used as a backup.
  - wires@shankspc.com: Questions about the wires.
  - funding@shankspc.com: Questions about funding and/or shipping of the loan.
  - purchasing@shankspc.com: When the file has been conditioned for purchase and the PA is issued, they will be uploaded/sent to your warehouse bank.
- If we are preparing the initial CD, we ask that the client get the fees along with the license numbers from the title company/settlement agent and provide that to us upon submission. We will prepare the CD and we will send it to you for approval. If approved, we ask that you get the borrower to sign it and send it back to us along with POD. Once we receive the signed initial CD back from you we will then send a CD to the title company to start balancing. Once we balance with title and you approve the CD we then send the Closing package to our QC department for a final review. Then once it passes QC we will send out documents. If you prepare the initial CD then we ask for the initial signed CD and the POD and then we follow the same steps above.
- Once the documents are sent to the Settlement agent the closer alerts the wire department. The wire department then starts working on ordering the wire in time for the funding of your loan.
- On the day or before the day of funding (REFI'S) the funders review the entire executed closing package. We ask for the entire package because once we review it for accuracy we use that package to stack the shipping package and that is what is uploaded to the investor for purchase review. Once the package is uploaded the loan goes into the post-closing queue.
- Post-closing works purchase conditions and once the loan gets purchased they upload the PA to the warehouse banks system so they can settle the loan.