

Module 5: Applicant Requirements
Learning Activity
Activity #3 – Entering an Application in UniFi



This module has provided you with an overview of the terms and concepts used when processing an application. To put these terms together it may be useful to enter an actual loan application in the UniFi system with some guidance. For an organizer to use during the exercise and more information click on the button provided below. An organizer to help you think about the process, identify relevant tips and capture questions you wish to ask others is provided below along with additional instructions.

Activity #3 Instructions: Speak with your supervisor about this suggested learning activity. It may even be helpful to have an experienced loan originator work with you to complete the activity. Obtain an application that has not yet been entered into UniFi. Utilize Chapter 5 in the DLOS Training Manual to complete the steps outlined. As you work, complete the organizer provided below to record relevant thoughts and questions regarding the process. *(Note: It may be helpful to provide your supervisor with a copy of this sheet as well so that they are aware of the activity you are conducting.)*

Entering an Application

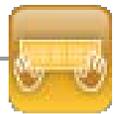
Questions <i>Record any questions you have throughout the process to ask your supervisor. Try to record the questions next to the step to which it applies.</i>	Steps Taken <i>Record the steps and actions taken to fully enter the application into UniFi. Try to record them in sequence.</i>	Tips/ Hints <i>Record any hits and/or tips you wish to remember as you enter the application. Try to record the tips next to the step to which it applies.</i>



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