

# Understanding Roles

Tuesday, May 9, 2017 11:22 AM

Depending upon the role you have been assigned in the system, will determine what functions are enabled to you. Your current role is noted at the top left corner of the screen.

Role

Administrator's of the system have the ability to change the Role they are in, by clicking on the down arrow and selecting another Role from the pick list.

Possible roles include:

- Administrator
- Borrower
- Loan Closer
- Loan Officer
- Loan Processor
- Loan Underwriter
- Post Closer

**Administrator:** Full control. Highest level of access rights.

**Borrower:** Can only print those forms which have already been marked as completed and satisfied by a member of your company.

**Loan Closer:** May complete data entry and review forms necessary in the *closing stages*. And when data is satisfied may mark *closing stage* or forms as complete for printing or signing.

**Loan Officer:** May complete data entry and review forms necessary in the *beginning* of the loan process. And when data is satisfied may mark *beginning stages* or forms as complete for printing or signing. Does *not* receive the Risk Based Pricing Notice in the forms list.

**Loan Processor:** May complete data entry and review forms necessary in the *beginning* of the loan process. And when data is satisfied, may mark *beginning stages* or forms as complete for printing or signing. In addition, *will* receive the Risk Based Pricing Notice in the forms list.

**Loan Underwriter:** May complete data entry and review forms necessary in the *underwriting stage*. And when data is satisfied may mark *underwriting stages* or forms as complete for printing or signing.

**Post Closer:** May complete data entry and review forms necessary in the *post closing stage*. And when data is satisfied may mark *post closing stages* or forms as complete for printing or signing.