

LOS Integration

More

Disclosure Status Report



The Disclosure Status and Disclosure Performance reports are used to manage and view employee's status and performance on Disclosure review submissions.

Global settings in Unifyty define minimum pass requirements for the Performance Report.

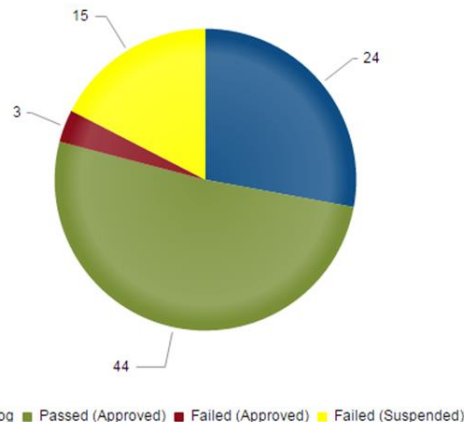
Disclosure Settings

Disclosure Requirement Count

Disclosure Requirement %

[Return to Dashboard](#)

Disclosure Performance Report



Integration with your LOS provides the ability to set Disclosure Review access based on performance. Notifications are automatically sent to the employee when their status changes.

This is a 2-way integration with the LOS taking Business Analytics to a new level.



BI Reports/Analytics/Dashboards



Information for the Dashboard is pulled directly from external systems (LOS, CRM, POS, Accounting, Etc.) creating a true BI and analytics tool. Dashboards are customizable by each employee based on their individual needs. Items that require attention are displayed in red. The Dashboards and reports filter contents depending on the user's position. Managers will see items for their branch and LOs will see just their items.

Dashboard

Add Widgets

Pending Tasks

No tasks found.

Agging-UW Initial Review

Requires Underwriter Initial Review

Business Days	0	1	2	3	4	5+
Count	2	4	0	1	0	0

Agging-UW Cond Review

Requires Underwriter Conditional Review

Business Days	0	1	2	3	4	5+
Count	5	1	0	0	0	0

Expiring and Expired Locks

Loan Officer	Loan No	Last Name	Channel
			Correspondent
			Brokered
			Correspondent
			Correspondent
			Correspondent

Review Times

Turn Time Notes

Corp. Processing Review Times	Purchase	Refinance
Initial Processor Review		
Conditions Review		
Closing File Setup		
Docs		

Underwriting Review Times	Purchase	Refinance
Reviewing Conditions from:		
Reviewing files from:		
Anticipated review date for conditions received today:		
Files received today		

Note:

Scenario Desk

Business Hours	>16	12-16	8-12	5-8	4	3	2	1
Count	0	0	0	0	0	0	0	1

Legend: PendingInternalCount (Green), PendingVendorCount (Blue), PendingUserCount (Red)

Expense Status

Status	Started	Submitted	Manager Approved	Manager Denied	Accounting Denied	Paid
Count	13	2	2	8	6	8

Employee Invitation

Stage	Getting Started	Preliminary HR Review	Send Documents	HR Review Completed	Final
Count	7	1	2	1	1

Send Invite

Pipeline

Total Active Pipeline: 185 / \$60,555,916

Stage	Stares	Sent to processing	Initial Review	Submitted	Cond. Approval	Re submission	Approved	Docs Ordered	Pre-Close Audit	Doc Preparation	Doc signed	Final
Count	34	22	37	7	4	3	1	1	5	4	16	1

BSA/AML Training

Status	Failed	Passed	Not Started
Count	7	99	2

BSA/AML Training

Status	Failed	Passed	Not Started
Count	7	99	2

Initial Disclosures

Loan Officer	Loan No	Last Name	Channel
			Correspondent
			Correspondent
			Correspondent
			Correspondent
			Correspondent

Agging-Processing Initial Review

Requires Processing Initial Review

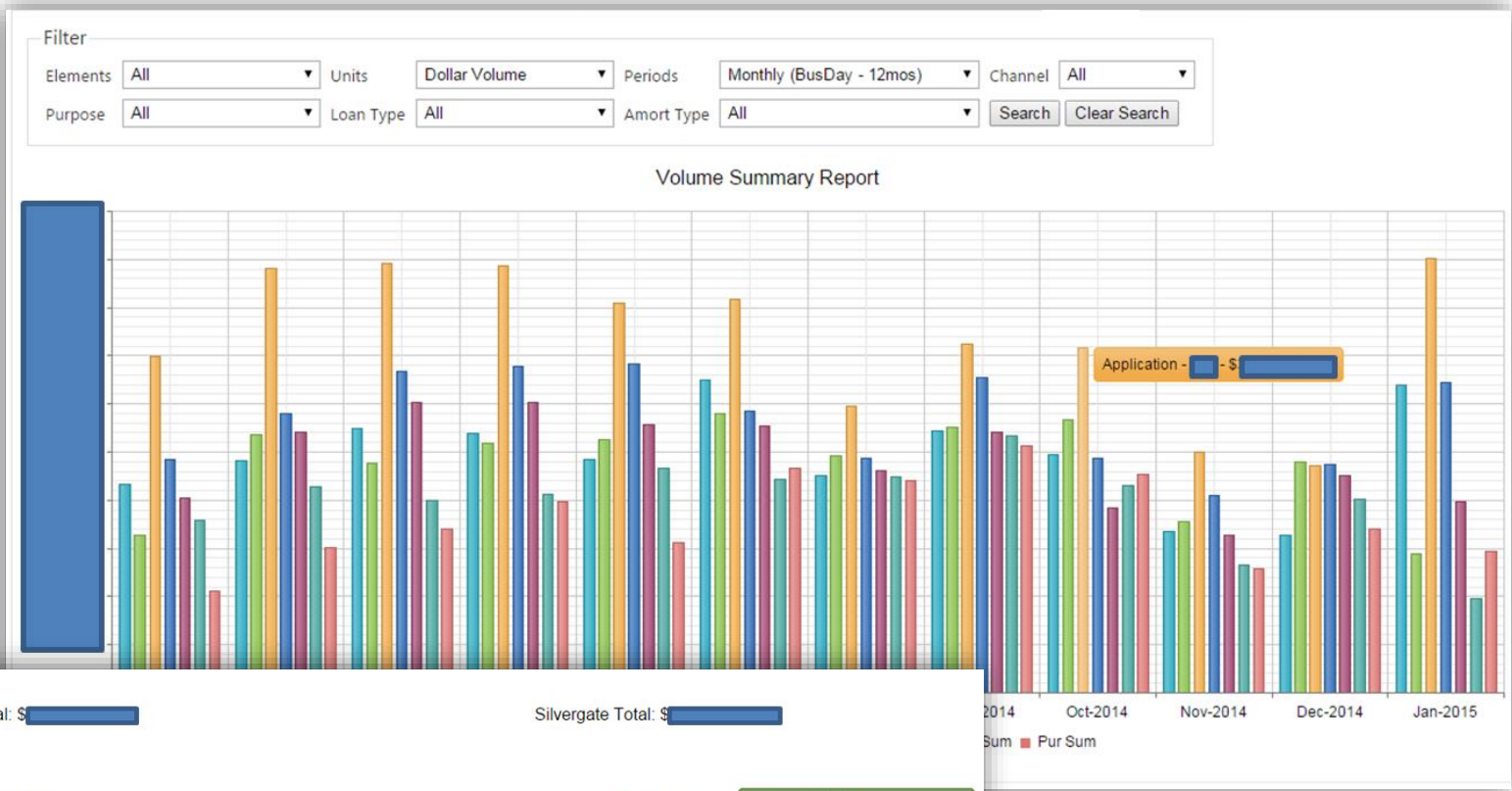
Business Days	0	1	2	3	4	5+
Count	10	0	5	4	0	3

BSA/AML Training

Status	Failed	Passed	Not Started
Count	7	99	2



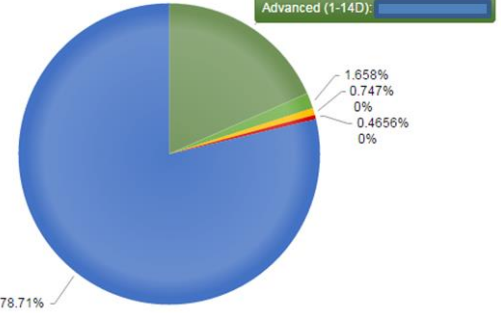
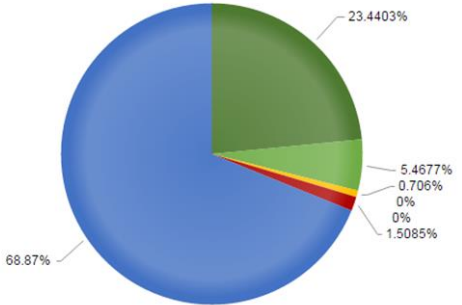
BI Tools/Reports/Dashboards



[Return to Dashboard](#)

Flagstar Total: \$

Silvergate Total: \$



■ Advanced (1-14D)
 ■ Advanced (15-21D)
 ■ Advanced (22-30D)
 ■ Advanced (31-45D)
 ■ Advanced (46-60D)
 ■ Advanced (60+D)
 ■ Available Amount

■ Advanced (1-14D)
 ■ Advanced (15-21D)
 ■ Advanced (22-30D)
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 ■ Advanced (60+D)
 ■ Available Amount

