

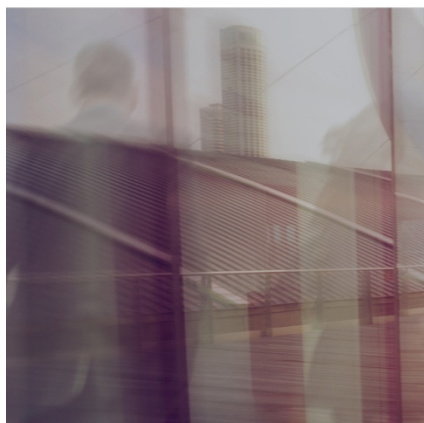
BrokerTOOLS

Broker File Review Process in Broker Tools




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Broker File Review Process – Broker Tools






Step 1: Set up Super User reviewer preference

1. Select the  icon from the menu at the left.
2. Select **Broker File Review**.
3. In the **Review Option** drop down select your preference:
 - Activate me as a Broker Review (notified on checklist items where Broker Review has been selected – If both Staff Review and Broker Review have been selected on the checklist item, the Broker Reviewer will be notified after the Staff Reviewer has approved the item).
 - Activate me as a Staff Reviewer (notified on checklist items where Staff Review has been selected – If both Staff Review and Broker Review have been selected on the checklist item, the Staff Reviewer will be notified first, followed by the Broker Reviewer once the Staff Reviewer has approved the item).
 - Turn off my review functionality – Not reviewing.

Step 2: Reviewer Notifications

1. Select the  icon from the menu at the left.
2. Select **Notifications**.
3. Select **General**.
4. Select the Document Review notifications you want to receive.
5. Select .

Step 3: Review Documents

1. Select the  icon from the menu at the left.
2. Select **Review Documents**.
3. At the upper right, filter the list of transactions with documents to be reviewed by:
 -  Transaction Name/Transaction Agent.
 -  Requested Date Range or Closing Date Range.
 -  Approval Status.
4. Each transaction in the list will have an indicator icon that displays the number of documents awaiting approval for that transaction .

5. Each Transaction provides access to three quick action buttons:




Change Transaction Status.






Go To Transaction.





Display Transaction Checklist (at a glance view of checklist items, their status and progress bar of completion).

6. To Approve or Reject a Document, open the Transaction by selecting the  icon for the transaction and either:



a) Select the  icon and choose Accept or Reject,
OR

b) Select the Document name to open the document and choose either the Accept icon  or the Reject icon ,
OR

c) Reset the document using the  icon. This feature is often used if the wrong document has been loaded to a checklist items. This means the agent will have to re-flag the document for approval.

7. Enter a **Note** for your action and select . This Note will be delivered to the agent with their Document Status Change email.

The platform is pre-populated with “canned notes” to select from the drop down. You can add to the drop down by entering a note and selected the Add to Canned Notes checkbox or by navigating to Broker Tools>Canned Notes and selecting the +Add icon.

You may check any notes that were previously left on the document by selecting the  icon or by selecting View Note under the  icon.