

Reunion Direct Instructions

Upload and submit your loan, lock online, request docs and make changes!



Upload Your Loan

- Step 1 Log into Reunion Direct
- Step 2 Click on *Pipeline*
- Step 3 Click on *Upload Loan*
- Step 4 Choose *FannieMae DU* as your *File Format* from the drop-down menu
- Step 5 Browse to find your file on your computer
- Step 6 Choose a *Loan Program* from the drop-down menu
- Step 7 Choose a *Contact Name* from the drop-down menu
- Step 8 Enter a valid *Email Address* (this person will be emailed all status changes)
- Step 9 Enter the following information in the *Comments* section:
 - Contact phone number
 - Doc Type (e.g., Full Doc, FHA Streamline)
 - Whether the loan is already underwritten (e.g., thru P.U.P. or FNMA)
- Step 10 Click on *Submit File*
- Step 11 Email or fax your complete package to rosenewloan@reunionmortgage.com or 866.619.5872, along with a *Submission Checklist*

Lock Your Loan [request](#)

- Step 1 Click on *Pipeline* to find and select your loan
- Step 2 Click on any lock request icon (located in several places throughout Reunion Direct—look for the word “request” and a picture of a gold padlock)
- Step 3 Verify the information shown and fill in all the fields marked with a red asterisk (*)
- Step 4 Scroll down to the *Lock Information* section and click on the rate and lock period you want
- Step 5 Click on *Submit Request*
- Step 6 You have 60 seconds to lock your loan. If you do not lock your loan, you can re-price it and lock another time.

Change Your Loan Notes

Once your loan has been uploaded, you can request changes through Reunion Direct’s *Add Note* (your entire production team will be notified).

- Step 1 Click on *Pipeline* to find and select your loan
- Step 2 Scroll down to the *Notes* section
- Step 3 Click on the yellow sticky note icon to request a change by adding a note (if Notes have been previously added, the icon will appear next to the loan on the Pipeline page, and you can click on it there)
- Step 4 Type a detailed note explaining your request
- Step 5 Click on *Save* (this will notify your production team, and someone will respond)
- Step 6 Email or fax your updated 1003/1008 (if it changed)

Change Your Lock

Requests for changes to an existing lock must be emailed to lockdesk@reunionmortgage.com.

Request Your Docs (AZ, CA, HI, NV, OR, UT)

- Step 1 Once your loan is underwriting approved, simply add a note in Reunion Direct with the following information: Vesting to be held in; 1st payment date desired; Impounds Yes or No; email address for Title; verify fees and request to draw docs

Request Your Docs (CO, IL, IN, KY, MO, MT, OH, OK, TX)

- Step 1 Once your file is cleared for closing, you will receive a clear-to-close email; complete the *Broker’s Clear to Close Checklist* and email it to your Sales Assistant
- Step 2 Schedule closing with your Sales Assistant

Note: If fees change from the original Good Faith Estimate, closing may be delayed due to re-disclosure requirements

Contact your Account Executive or branch if you need additional assistance!