

Session 0 CU\*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

Work/View Application Status

Pending Processing

Created Jan 01, 2019 to Nov 04, 2019 [MMDDYYYY] Jump to: Loan app # Last name

To get a "dashboard" view of progress toward your team's goals, use Activity Tracking to display a statistical analysis screen showing all applications in the pipeline.

Wait Times This Week

0 < 1 hr

0 1 - 4 hrs

0 4 - 8 hrs

1 > 1 day

New Application

Refresh

Activity Tracking

Counts by UW Code

Web Version

View Power Line

Filter by

UW status

Interviewer ID

Dealer

Underwriter ID

Loan category

Product code

Interviewer branch

Delivery channel

Business unit

Pending

Booked

Denied

App #	Applicant Name	App Date/Time	DC	Decision	Int	ID	Action
337139		Jun 19, 2019 18:16	CU	Fail	NG	SU	SUBMIT- LOAN REVIEW
337140		Jun 19, 2019 18:22	HB	Fail Fltr	96	RY	DUPLICATE APPLICATION
337141		Jun 19, 2019 18:28	HB		96	RY	PENDING- NEED INFO
337142		Jun 19, 2019 19:30	HB	Fail Fltr	96	RY	DUPLICATE APPLICATION
337143		Jun 19, 2019 19:50	HB		96	96	HOME BANKING REQUEST
337144		Jun 19, 2019 20:13	HB		96	96	HOME BANKING REQUEST
337146		Jun 19, 2019 21:25	CU	Fail Fltr	RY	RY	PLAN ONLY-NO LOAN
337013	NonMbr	Jun 19, 2019 08:48	RO		55	55	COUNTEROFFER
337019	NonMbr	Jun 19, 2019 09:33	CU	Fail	LB	LB	SUBMIT- LOAN REVIEW
337022	NonMbr	Jun 19, 2019 09:42	RO		55	55	COUNTEROFFER
337023	NonMbr	Jun 19, 2019 09:46	RO		55	55	COUNTEROFFER
337038	NonMbr	Jun 19, 2019 10:45	MA		14	KL	PENDING- NEED INFO

Work w/ Loan Req

Checklist

UW Comments

App Comments

Dealer

Loan File

Decision

Delete App

Key Activity Tracking

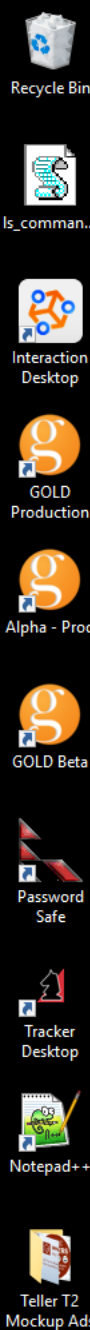
more

SUBMIT- UNDERWRITER	1	SUBMIT- MSO/MSR	DEALERTRACK
SUBMIT- LOAN REVIEW	7	HOME BANKING REQUEST	ROUTE ONE

Mockup only; subject to change

Today's  
CU\*BASE LOS  
"The Loan Queue"

Windows taskbar with icons for Mail, Edge, Chrome, Outlook, Snip & Sketch, Skype for Business, mwarren, GUI Building - GOL..., Session 0 CU\*BASE..., Interaction Desktop, Photos, and system tray showing Desktop, 4:03 PM, 11/4/2019.



Session CU\*BASE GOLD Edition -  
File Edit Tools Help

Work/View Application Status Pending Processing

Created Jan 01, 2019 to Nov 04, 2019 [MMDDYYYY] Jump to: Loan app # Last name

App #	Applicant Name	Date/Time	DC	Pass	Fail	Review	Central Underwriting Status		
							Int	ID	Action
337139		Jun 19 18:16	CU		Fail		NG	SV	SUBMIT- LOAN REVIEW
337140		Jun 19 18:22	HB		Filter		96	RY	DUPLICATE APPLICATION
337141		Jun 19 18:28	HB				RY	RY	PENDING- NEED INFO
337142		Jun 19 19:30	HB		Filter		96	RY	DUPLICATE APPLICATION
337143		Jun 19 19:50	HB				96	96	HOME BANKING REQUEST
337144		Jun 19 20:13	HB				96	96	HOME BANKING REQUEST
337146		Jun 19 21:25	CU		Filter		RY	RY	PLAN ONLY-NO LOAN
337013		Jun 19 08:48	RO				55	55	COUNTEROFFER
337019		Jun 19 09:33	CU		Fail		LB	LB	SUBMIT- LOAN REVIEW
337022		Jun 19 09:42	RO				55	55	COUNTEROFFER
337023		Jun 19 09:46	RO				55	55	COUNTEROFFER
337038		Jun 19 10:45	MA				14	KL	PENDING- NEED INFO
337054		Jun 19 11:52	MA				14	KL	PENDING- NEED INFO
337067		Jun 19 13:11	CU		Filter		AO		Model-Requested
337078		Jun 19 14:04	HB				96		
337082		Jun 19 14:02	DP		Fail		14	14	COUNTEROFFER
337092		Jun 19 14:27	MA				14	SV	PENDING- NEED INFO
337094		Jun 19 14:38	HB				96	SH	PENDING- NEED INFO
337106		Jun 19 15:37	CU		Fail		SD		Model-Requested
337108		Jun 19 15:42	CU		Fail		AO		Model-Requested
337117		Jun 19 16:15	RO				14	14	APPROVAL INDIRECT
337124		Jun 19 16:43	SA		Filter		LH	69	PENDING- NEED INFO
337126		Jun 19 16:47	RO				LH	LH	COUNTEROFFER
337133		Jun 19 17:16	RO				LH	LH	COUNTEROFFER

☐ Work With Loan Request

☐ Application Comments

☐ Underwriting Comments

☐ Loan File

☐ Dealer

☐ Delete Application

☐ Decision

☐ Checklist

New Application

Refresh

Booked Loans

Denied Processing

Pending Processing

Activity Tra

Counts by UW Code

Web Version

View Power Line

Key Activity Tracking

Wait Times This Week

Work With

← → ↑ ||

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🔗

🔍

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Mockup only; subject to change

Today's  
CU\*BASE LOS  
(standard size)

Recycle Bin

LegaSuite Workben...

LoadListBo...

Is\_comman...

iAccess - CUADEV.hod

Interaction Desktop

GOLD Alpha

GOLD Production

Cleanup

Alpha - Prod Panel\_Chart...

PDF Chart List.xlsx

GOLD Beta

Tracker Desktop

CTE

Notepad++

Teller T2 Mockup Ads

Session CU\*BASE GOLD Edition -

File Edit Tools Help

Work/View Application Status

Pending Processing

Created Jan 01, 2019 to Oct 22, 2019 Jump to: Loan app # 336957 Last name

App #	Applicant Name	Date/Time	Delivery Channel	Pass	Fail	Review	Central Underwriting Status		
							Int	ID	Action
336957	M	Jun 18 15:07	CU*BASE		Fail		BQ		Model-Requested
336959	C	Jun 18 15:09	CU*BASE				AB	01	PENDING- NEED INFO
336961	R	Jun 18 15:12	O'Connors Auto Outle				14	14	DUPLICATE APPLICATIO
336962	K	Jun 18 15:12	CU*BASE	Decision			AD	04	PENDING- NEED INFO
336963	J	Jun 18 15:16	CU*BASE		Fail		M5		Model-Requested
336964	T	Jun 18 15:19	CU*BASE		Fail		AD	04	APPROVED- CONDITIONS
336965	J	Jun 18 15:22	CU*BASE		Fail		DM		Model-Requested
336966	R	Jun 18 15:24	O'Connors Auto Outle				14	AD	APPROVED- AUTO DEC.
336968	K	Jun 18 15:29	Online Banking				96	SV	PENDING- NEED INFO
336969	J	Jun 18 15:27	CU*BASE				R2	R2	PLAN ONLY-NO LOAN
336970	M	Jun 18 15:28	Dealer Track				LH	LH	COUNTEROFFER
336972	G	Jun 18 15:34	CU*BASE	Decision			KF		Model-Requested
336973	M	Jun 18 15:54	CU*BASE		Filter		MU	01	APPROVED- CONDITIONS
336974	J	Jun 18 16:00	CU*BASE		Fail		KF		COSIGNER INFO ONLY
336975	J	Jun 18 16:01	CU*BASE		Fail		KF		-Requested
336976	C	Jun 18 16:01	CU*BASE		Fail		AL	69	PENDING- TN
336977	B	Jun 18 16:01	CU*BASE		Fail		KF		Mo
336979	S	Jun 18 16:07	CU*BASE	Decision			LB	AD	A
336980	R	Jun 18 16:12	CU*BASE	Decision			BQ	AD	AP
336984	A	Jun 18 16:20	CU*BASE		Fail		55		
336985	R	Jun 18 16:24	Online Banking				96		
336986	D	Jun 18 16:27	CU*BASE		Fail		MO	AD	AP
336987	J	Jun 18 16:30	CU*BASE		Fail		AL	A	
336989	EDINA JASHREVIC	Jun 18 16:42	Online Banking				96		

Work With Loan Request

Underwriting Comments

Dealer

Decision

Checklist

Application Comments

Loan File

Delete Application

Pipeline View

Booked Loans

Denied Processing

Pending Processing

New Application

Refresh

Booked Loans

Denied Processing

Pending Processing

Activity Tracking

Counts by Underwriting Code

Web Version

View Power Line

Key Activity Tracking

Wait Times This Week

FR (4177) 11/01/19

Tomorrow's  
CU\*BASE LOS  
(size L)

Mockup only; subject to change

# Work/View Application Status

Pending Processing

Created  to  Jump to: Loan app #  Last name

App #	Applicant Name			Application Date/Time	Delivery Channel	Pass	Fail	Review	Central Underwriting Status		
									Int	ID	Action
336957	M	Non-Mbr	See Comments	Jun 18, 2019 15:07	CU*BASE		Fail		BQ		Model-Requested
336959	C	Non-Mbr		Jun 18, 2019 15:09	CU*BASE				AB	01	PENDING- NEED INFO
336961	R	Non-Mbr		Jun 18, 2019 15:12	O'Connors Auto Outl				14	14	DUPLICATE APPLICATION
336962	K	Non-Mbr		Jun 18, 2019 15:12	CU*BASE	Pass Decision			AD	04	PENDING- NEED INFO
336964	T	Non-Mbr	See Comments	Jun 18, 2019 15:19	CU*BASE		Fail		AD	04	APPROVED- CONDITIONS
336966	R	Non-Mbr		Jun 18, 2019 15:24	O'Connors Auto Outl				14	AD	APPROVED- AUTO DEC.
336970	M	Non-Mbr	See Comments	Jun 18, 2019 15:28	Dealer Track				LH	LH	COUNTEROFFER
336994	X	Non-Mbr		Jun 18, 2019 16:46	MARSH AUTO SALES				14	SU	PENDING- NEED INFO
336998	A	Non-Mbr		Jun 18, 2019 16:55	Online Banking				SK	SK	PENDING- NEED INFO
336684	S			Jun 17, 2019 08:40	CU*BASE	Pass Decision			NK		Model-Requested
336687	D		See Comments	Jun 17, 2019 09:03	Online Banking		Fail Filter		TR	HR	PENDING- NEED INFO
336689	K		See Comments	Jun 17, 2019 09:24	CU*BASE	Pass Decision			TR	01	APPROVED- CONDITIONS
336690	C			Jun 17, 2019 09:29	CU*BASE				KR		Model-Requested
336691	H			Jun 17, 2019 09:31	CU*BASE				NK	JO	PENDING- NEED INFO
336692	S			Jun 17, 2019 09:31	CU*BASE		Fail			CX	PLAN ON HOLD - LOAN
336694	R			Jun 17, 2019 09:37	CU*BASE				HR		
336697	N			Jun 17, 2019 09:48	CU*BASE		Fail Filter		5		
336700	E			Jun 17, 2019 09:56	CU*BASE		Fail Filter				
336703	L		See Comments	Jun 17, 2019 10:01	CU*BASE						
336706	P			Jun 17, 2019 10:12	CU*BASE						
336707	L			Jun 17, 2019 10:12	CU*BASE						
336708	D			Jun 17, 2019 10:16	CU*BASE	Pass Decision					
336710	K			Jun 17, 2019 10:21	CU*BASE		Fail Filter		AB		
336713	D		See Comments	Jun 17, 2019 10:26	Online Banking				MU	SU	APPROVED-

Pipeline View

Booked Loans

Denied Processing

Pending Processing

Filters

UW status

Interviewer ID

Dealer

Underwriter ID

Category

Code

Branch

Tomorrow's  
CU\*BASE LOS  
(size XL)

- ☐ Work With Loan Request
- ☐ Underwriting Comments
- ☐ Dealer
- ☐ Decision
- ☐ Checklist
- ☐ Application Comments
- ☐ Loan File
- ☐ Delete Application

# Work/View Application Status

Pending Processing

Created  to  Jump to: Loan app #  Last name

App #	Applicant Name			Application Date/Time	Delivery Channel	Pass	Fail	Review	Central Underwriting Status		
									Int	ID	Action
336957	M	Non-Mbr	See Comments	Jun 18, 2019 15:07	CU*BASE		Fail		BQ		Model-Requested
336959	C	Non-Mbr		Jun 18, 2019 15:09	CU*BASE				AB	01	PENDING- NEED INFO
336961	R	Non-Mbr		Jun 18, 2019 15:12	O'Connors Auto Outl				14		PENDING- NEED INFO
336962	K	Non-Mbr		Jun 18, 2019 15:12	CU*BASE	Pass Decision					PENDING- NEED INFO
336964	T	Non-Mbr	See Comments	Jun 18, 2019 15:19	CU*BASE		Fail				PENDING- NEED INFO
336966	R	Non-Mbr		Jun 18, 2019 15:24	O'Connors Auto Outl						PENDING- NEED INFO
336970	M	Non-Mbr	See Comments	Jun 18, 2019 15:28	Dealer Track						PENDING- NEED INFO
336994	X	Non-Mbr		Jun 18, 2019 16:46	MARSH AUTO SALES						PENDING- NEED INFO
336998	A	Non-Mbr		Jun 18, 2019 16:55	Online Banking				SK	SK	PENDING- NEED INFO
336684	S			Jun 17, 2019 08:40	CU*BASE	Pass Decision			NK		Model-Requested
336687	D		See Comments	Jun 17, 2019 09:03	Online Banking		Fail Filter		TR	HR	PENDING- NEED INFO
336689	K		See Comments	Jun 17, 2019 09:24	CU*BASE				TR	01	APPROVED- CONDITIONS
336690	C			Jun 17, 2019 09:29	CU*BASE				KR		Model-Requested
336691	H			Jun 17, 2019 09:31	CU*BASE				NK	JO	PENDING- NEED INFO
336692	S			Jun 17, 2019 09:31	CU*BASE				CX	CX	PLAN ONLY-NO LOAN
336694	R			Jun 17, 2019 09:37	CU*BASE				HR		
336697	N			Jun 17, 2019 09:48	CU*BASE		Fail Filter		50	50	WITHDRAWN BY MEMBER
336700	E			Jun 17, 2019 09:56	CU*BASE		Fail Filter		BD	BD	PENDING- NEED INFO
336703	L		See Comments	Jun 17, 2019 10:01	CU*BASE				HR	JO	APPROVED
336706	P			Jun 17, 2019 10:12	CU*BASE				TK	TK	PENDING- NEED INFO
336707	L			Jun 17, 2019 10:12	CU*BASE				M5		
336708	D			Jun 17, 2019 10:16	CU*BASE	Pass Decision			MR	MR	PENDING- NEED INFO
336710	K			Jun 17, 2019 10:21	CU*BASE		Fail Filter		AB	KL	PENDING- NEED INFO
336713	D		See Comments	Jun 17, 2019 10:26	Online Banking				MV	SU	APPROVED- CONDITIONS

- Work With Loan Request
- Underwriting Comments
- Dealer
- Decision
- Checklist
- Application Comments
- Loan File
- Delete Application

Pipeline View

- Booked Loans
- Denied Processing
- Pending Processing

Filters

- UW status
- Interviewer ID
- Dealer
- Underwriter ID
- Loan category
- Product code
- Interviewer branch
- Delivery channel
- Business unit

New Application	Refresh	Booked Loans	Denied Processing	Pending Processing	Activity Tracking	Counts by Underwriting Code
Web Version	View Power Line	Key Activity Tracking	Wait Times This Week			