fcm first community mortgage

transition training schedule

critical function training

Day 1

9:00am	IT hardware setup, access and call with employee
10:00am	Licensing needs check/NMLS attestation
10:30am	Credentials received check and review call
11:00am	Simple Nexus review call #1
12:30pm	Marketing Call - CRM
2:00pm	Licensing needs check/NMLS attestation
3:00pm	Validate the following:

- *Pricing engine access*
- *Ability to lock a loan*
- *Ability to build an app*
- *Ability to disclose*

Day 2

9:00am	Identify live file needs
11:00am	Encompass file input (real or mock), credential input and save
1:00pm	Simple Nexus review call #2
2:00pm	H3 and credit provider review call
3:00pm	Welcome call with RPM

Phase 1

2 weeks before start date

Discovery:
- Additional State License Check
- Appraisal panel needs, AMC coverage for current lending footprint
- Review current team roles, responsibilities, and processes

1 week before start date
- Invites are sent from RTT, marketing, IT for week 1 training calls
- RPM introduction call

Phase 2

day 1 & 2

Critical Function Training

days 3 - 5
- File input 1-on-1 with RTT
- Blueprint income input
- MI options
- Pricing Exception process

week 2
- File input 1-on-1 with RTT
- Borrower Encompass function review
- OB Change Request function review
- Verify successful submission to processing and underwriting
- Call with Diversity Team

week 3
- File input 1-on-1 with RTT
- Condo approval process by program
- AAR process review
- Verify CD and closing procedure best practices

week 4
- File input 1-on-1 with RTT
- Support structure review

months 2 - 4
- Continued 1-on-1 support
- Monitoring and grading of initial disclosure review
- RTT on call for any support needs