

Loan Officer Onboarding Process

1: Application Completed

Candidate completes online application on company website.

2: PAN Submitted

Hiring manager fills out PAN for new employee and submits it to HR. NMLS # is run through MMI & Consumer Access to determine previous employment & production level.

3: Offer Letter Accepted

HR sends offer letter to candidate for acceptance. Candidate accepts offer.

4: Background Cleared

Background check paperwork sent to candidate. If background clears, New Employee Notice email is sent out with hire date.

5: Employee into Paycom

New hire is entered into Paycom and provided onboarding checklist in Paycom (includes employment agreements, steps on transferring license, and marketing questionnaire).

6: Account Creation

HR & Marketing create all accounts and materials once onboarding checklist is complete in anticipation of license transfer.

7: Email Signature & Business Cards

LO is emailed business card and email signature for approval. Cards ordered upon arrival.

8: License Transfers

LO's license fully transfers. All welcome emails, credentials, accounts, and materials are sent to LO and their supervisor.



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