



Loan Processor Performance Scorecard

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The Housing Assistant



Overview

This scorecard provides a standardized framework for evaluating the performance of the loan processor. It supports organizational objectives by aligning performance measurement with operational procedures (SOPs) and key performance indicators (KPIs). Scorecards are essential for ensuring consistency, accountability, and ongoing process improvement across mortgage operations.

Why Scorecards Matter

Scorecards promote transparency and consistency across roles. When paired with documented SOPs and team KPIs, they:

- Help maintain compliance with investor and regulatory expectations
- Provide a quantifiable baseline to assess performance trends
- Serve as tools for coaching, recognition, and corrective action
- Create a feedback loop to improve workflows and customer satisfaction

THA Note: This scorecard should be treated as a baseline and tailored to the organization's specific metrics and goals.

Performance Evaluation Metrics

Performance Metric	Target
Clean File Submission Rate	$\geq 95\%$
Initial Conditions Turn Time	≤ 48 hours
Disclosure Accuracy	$\geq 98\%$
Missed Compliance Dates	0
Escalations or Errors	≤ 2 /month

Description

This scorecard monitors a processor's accuracy, speed, and compliance. Timely submission of clean files helps reduce underwriting turn times and improves pull-through rates.