

B.O.L.T. TRAINING

Lesson 22 - Ordering A Closing Disclosure And Closing Docs



In This Training We Will Discuss

- Ordering A Closing Disclosure And Closing Docs
- Important Information



Ordering A Closing Disclosure And Closing Docs

Status and Agents

Status

Current Status: Approved Status Date: 12/27/2018 Action: [view status certificate](#) [CHANGE LOAN STATUS](#)

Loan Open Pre-Approved **Approved** Cond Review Funded

12/18/2018 12/27/2018

Agents

Assigned Agents in *TPO LQB Testing

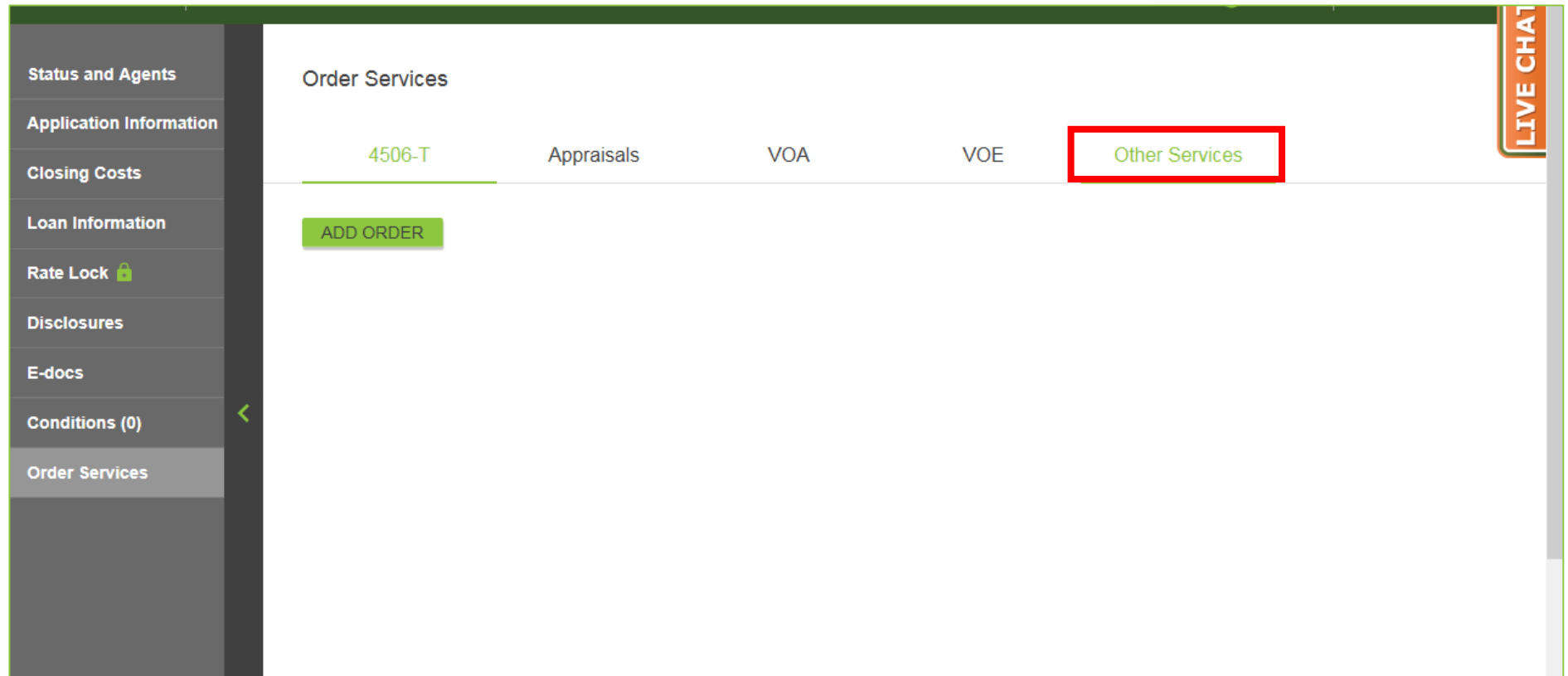
Loan Officer re-assign	Processor assign
Name: Matthew Baker	Name: [REDACTED]
Email: matthew.baker@mwfinc.com	Email: [REDACTED]
Phone: (909) 793-1500	Phone: [REDACTED]

Assigned Agents in Mountain West Financial, Inc.

Order Services

LIVE CHAT

1. Within a loan, click “Order Services”.



2. Click “Other Services”.

Status and Agents

Application Information

Closing Costs

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (0)

Order Services

Order Services

4506-T

Appraisals

VOA

VOE

Other Services

Document Upload

COC Request

CD/DOC Request

MCC Request

VOE/VOI Request


TCF HELOC Request

Verbal Credit Authorization

Employer Lookup

LIVE CHAT

3. Click “CD/DOC Request”.



888.793.6470

Upload Settlement Statement

Please upload the Settlement Statement

Select a file to upload : Browse...

Loan Number : 10
Borrower : SU
Property Address : 12
Loan Amount : \$240,000.00
Interest Rate : 5.000
Appraised Value : \$300,000.00
Impounds : Yes


3:18:19 PM
aker@mwfin
NF FIXED 30

Signing and Closing Dates Confirmation

Signing Date : 12/18/2018 Closing Date : 12/31/2018

Fee Confirmation (Please confirm all fees below)

4. The Settlement Statement window will appear.



888.793.6470

Upload Settlement Statement

Please upload the Settlement Statement

Select a file to upload : **Browse...** **Upload**

Close

Loan Number : 10
Borrower : SU
Property Address : 12
Loan Amount : \$240,000.00
Interest Rate : 5.000
Appraised Value : \$300,000.00
Impounds : Yes

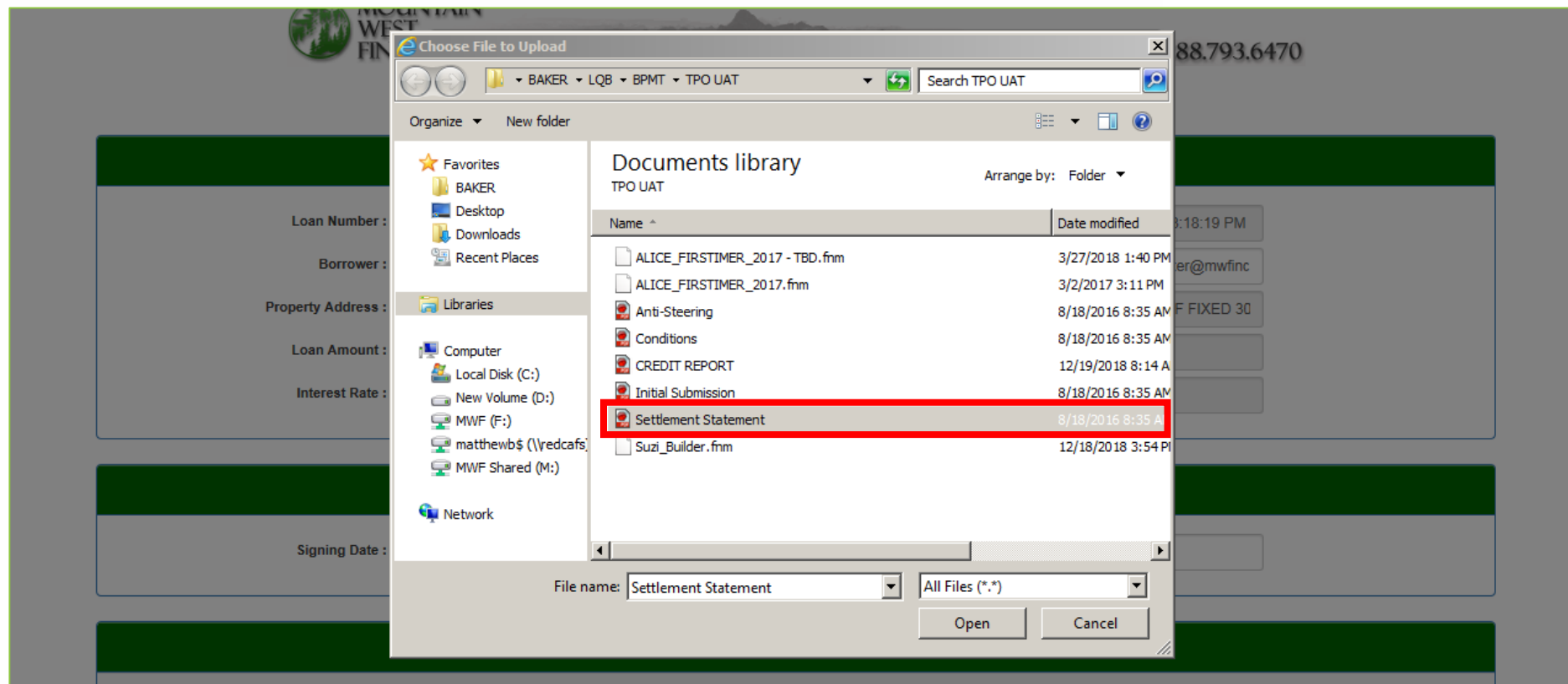
3:18:19 PM
aker@mwfin
NF FIXED 30

Signing and Closing Dates Confirmation

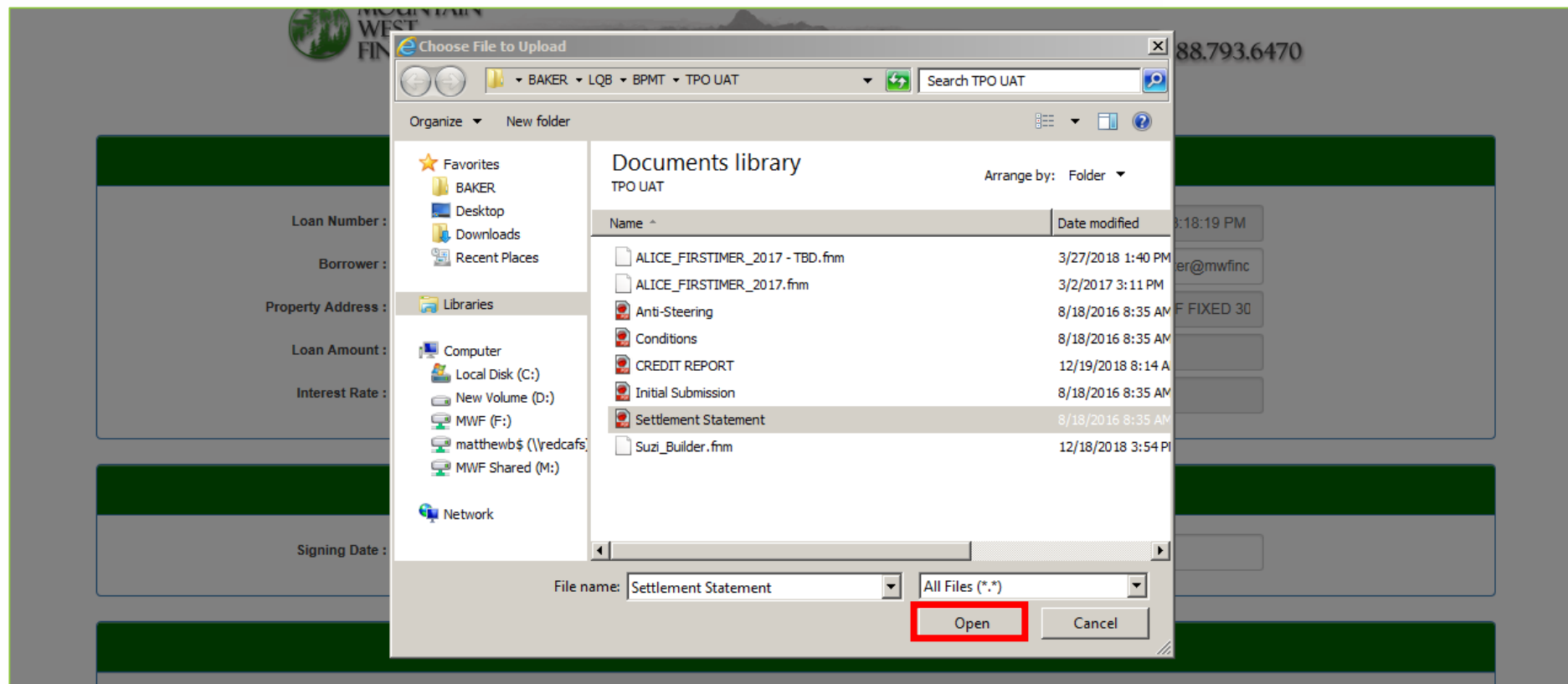
Signing Date : 12/18/2018
Closing Date : 12/31/2018

Fee Confirmation (Please confirm all fees below)


5. Click “Browse”.



6. Find and select the most recent Settlement Statement.



7. Click “Open”.



888.793.6470

Upload Settlement Statement

Please upload the Settlement Statement

Select a file to upload :

Loan Number : 10
Borrower : SU
Property Address : 12
Loan Amount : \$240,000.00
Interest Rate : 5.000
Appraised Value : \$300,000.00
Impounds : Yes


3:18:19 PM
aker@mwfinc
NF FIXED 30

Signing and Closing Dates Confirmation

Signing Date : 12/18/2018
Closing Date : 12/31/2018

Fee Confirmation (Please confirm all fees below)

8. Click “Upload”.



888.793.6470

File : \\redcafs\matthewb\$\Documents\BAKER\LQB\BPMT\TPO UAT\Settlement Statement.pdf was successfully uploaded to Loan 1000048142

OK


Loan Number :	1000048142	Request Date :	12/27/2018 3:18:19 PM
Borrower :	SUZI BUILDER	Requestor :	matthew.baker@mwfin
Property Address :	1209 Nevada	Loan Program :	CF30 - CONF FIXED 30
Loan Amount :	\$240,000.00	Appraised Value :	\$300,000.00
Interest Rate :	5.000	Impounds :	Yes

Signing and Closing Dates Confirmation

Signing Date :	12/18/2018	Closing Date :	12/31/2018
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Fee Confirmation (Please confirm all fees below)

9. An upload confirmation window will appear.



888.793.6470

File : \\redcafs\matthewb\$\Documents\BAKER\LQB\BPMT\TPO UAT\Settlement Statement.pdf was successfully uploaded to Loan 1000048142

OK

Loan Number :	1000048142	Request Date :	12/27/2018 3:18:19 PM
Borrower :	SUZI BUILDER	Requestor :	matthew.baker@mwfin
Property Address :	1209 Nevada	Loan Program :	CF30 - CONF FIXED 30
Loan Amount :	\$240,000.00	Appraised Value :	\$300,000.00
Interest Rate :	5.000	Impounds :	Yes

Signing and Closing Dates Confirmation

Signing Date :	12/18/2018	Closing Date :	12/31/2018
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Fee Confirmation (Please confirm all fees below)

10. Click “OK”.

Interest Rate : 5.000 Impounds : Yes

Signing and Closing Dates Confirmation

Signing Date : 12/18/2018 Closing Date : 12/31/2018

Fee Confirmation (Please confirm all fees below)

The non editable fees shown, in grey box, below represents fees currently in the loan file. If you would like to change a fee, click "Yes" next to the fee line and use the field to the right of the current fee to enter the new amount. *Note that an invoice is required to verify the fee amount.*

	Current Fee	New Fee		Current Fee	New Fee
Loan Origination Fee : Borrower	\$0.00		Processing Fee :	\$0.00	
Credit Report Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$100.00		Appraisal Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$425.00	
Appraisal Re-Inspection Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$125.00		Pest Inspection Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
Contractor Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		Plumbing Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
Roof Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		Septic Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
HOA Transfer Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		VOE Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	

11. Confirm the Signing Date.

Interest Rate : 5.000 Impounds : Yes

Signing and Closing Dates Confirmation

Signing Date : 12/18/2018 Closing Date : 12/31/2018

Fee Confirmation (Please confirm all fees below)

The non editable fees shown, in grey box, below represents fees currently in the loan file. If you would like to change a fee, click "Yes" next to the fee line and use the field to the right of the current fee to enter the new amount. *Note that an invoice is required to verify the fee amount.*

	Current Fee	New Fee		Current Fee	New Fee
Loan Origination Fee : Borrower ▼	\$0.00		Processing Fee :	\$0.00	
Credit Report Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$100.00		Appraisal Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$425.00	
Appraisal Re-Inspection Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$125.00		Pest Inspection Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
Contractor Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		Plumbing Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
Roof Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		Septic Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
HOA Transfer Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		VOE Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	

12. Confirm the Closing Date.

Fee Confirmation (Please confirm all fees below)

The non editable fees shown, in grey box, below represents fees currently in the loan file. If you would like to change a fee, click "Yes" next to the fee line and use the field to the right of the current fee to enter the new amount. *Note that an invoice **is required** to verify the fee amount.*

	Current Fee	New Fee		Current Fee	New Fee
Loan Origination Fee : Borrower	\$0.00		Processing Fee :	\$0.00	
Credit Report Fee : <input checked="" type="radio"/> Yes <input type="radio"/> No	\$100.00	\$80.00	Appraisal Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$425.00	
Appraisal Re-Inspection Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$125.00		Pest Inspection Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
Contractor Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		Plumbing Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
Roof Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		Septic Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
HOA Transfer Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		VOE Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
VOD Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		EOI Direct Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	

Comments:

For Each Fee Requiring An Updated Amount

- 13.** Click "Yes", find and upload the invoice, and then enter the New Fee amount.

Fee Confirmation (Please confirm all fees below)

The non editable fees shown, in grey box, below represents fees currently in the loan file. If you would like to change a fee, click "Yes" next to the fee line and use the field to the right of the current fee to enter the new amount. *Note that an invoice **is required** to verify the fee amount.*

	Current Fee	New Fee		Current Fee	New Fee
Loan Origination Fee : Borrower ▼	\$0.00	<input style="width: 50px;" type="text"/>	Processing Fee :	\$0.00	<input style="width: 50px;" type="text"/>
Credit Report Fee : <input checked="" type="radio"/> Yes <input type="radio"/> No	\$100.00	\$80.00	Appraisal Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$425.00	
Appraisal Re-Inspection Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$125.00		Pest Inspection Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
Contractor Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		Plumbing Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
Roof Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		Septic Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
HOA Transfer Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		VOE Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
VOD Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		EOI Direct Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	

Comments:

Enter Comments Here

14. Enter Comments, if needed.

Roof Cert Fee : ☐ Yes ☒ No \$0.00

Septic Cert Fee : ☐ Yes ☒ No \$0.00

HOA Transfer Fee : ☐ Yes ☒ No \$0.00

VOE Fee : ☐ Yes ☒ No \$0.00

VOD Fee : ☐ Yes ☒ No \$0.00

EOI Direct Fee : ☐ Yes ☒ No \$0.00

Comments:


Enter Comments Here

Credits

Seller Credit Total : \$0.00 Additional Credits :

☐ I have reviewed the fees listed above

[Submit CD/DOC Order Form](#)

 Equal Housing Lender

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15. Enter Seller Credits, if applicable.

Roof Cert Fee : ☐ Yes ☒ No \$0.00

Septic Cert Fee : ☐ Yes ☒ No \$0.00

HOA Transfer Fee : ☐ Yes ☒ No \$0.00

VOE Fee : ☐ Yes ☒ No \$0.00

VOD Fee : ☐ Yes ☒ No \$0.00

EOI Direct Fee : ☐ Yes ☒ No \$0.00

Comments:

Enter Comments Here


Credits

Seller Credit Total : \$0.00

Additional Credits :

☐ I have reviewed the fees listed above


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16. Enter Additional Credits, if applicable.



Roof Cert Fee : ☐ Yes ☒ No \$0.00

Septic Cert Fee : ☐ Yes ☒ No \$0.00

HOA Transfer Fee : ☐ Yes ☒ No \$0.00

VOE Fee : ☐ Yes ☒ No \$0.00

VOD Fee : ☐ Yes ☒ No \$0.00

EOI Direct Fee : ☐ Yes ☒ No \$0.00

Comments:


Enter Comments Here

Credits

Seller Credit Total : \$0.00 Additional Credits :

☒ I have reviewed the fees listed above

Submit CD/DOC Order Form

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17. Select “I have reviewed the fees listed above”.

Roof Cert Fee : ☐ Yes ☒ No \$0.00

Septic Cert Fee : ☐ Yes ☒ No \$0.00

HOA Transfer Fee : ☐ Yes ☒ No \$0.00

VOE Fee : ☐ Yes ☒ No \$0.00

VOD Fee : ☐ Yes ☒ No \$0.00

EOI Direct Fee : ☐ Yes ☒ No \$0.00

Comments:


Enter Comments Here

Credits

Seller Credit Total : \$0.00 Additional Credits :

☒ I have reviewed the fees listed above

Submit CD/DOC Order Form

 Equal Housing Lender

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https://portal.mwfinc.com/CDocRequest/?_ticket=AAFAAAD%252f%252f%252f%252f%252fAQAAAAAAAAAAMAAAAF7MUU1... [Licensing](#) [Privacy Policy](#)

18. Click “Submit CD/DOC Order Form”.

Signing Date : 12

Your CD/Doc Order has been successfully submitted. A confirmation email has been sent. Thank you!

OK

The non editable fees shown, in grey box, be use the field to the right of the current fee to enter the new amount. *Note that an invoice is required to verify the fee amount.*

	Current Fee	New Fee		Current Fee	New Fee
Loan Origination Fee : <input type="text" value="Borrower"/>	\$0.00		Processing Fee :	\$0.00	
Credit Report Fee : <input checked="" type="radio"/> Yes <input type="radio"/> No	\$100.00	\$80.00	Appraisal Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$425.00	
Appraisal Re-Inspection Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$125.00		Pest Inspection Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
Contractor Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		Plumbing Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
Roof Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		Septic Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
HOA Transfer Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		VOE Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
VOD Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		EOI Direct Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	

Comments:

Enter Comments Here

19. A confirmation window will appear.

Signing Date : 12

Your CD/Doc Order has been successfully submitted. A confirmation email has been sent. Thank you!

OK

The non editable fees shown, in grey box, be use the field to the right of the current fee to enter the new amount. *Note that an invoice is required to verify the fee amount.*

	Current Fee	New Fee		Current Fee	New Fee
Loan Origination Fee : <input type="text" value="Borrower"/>	\$0.00		Processing Fee :	\$0.00	
Credit Report Fee : <input checked="" type="radio"/> Yes <input type="radio"/> No	\$100.00	\$80.00	Appraisal Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$425.00	
Appraisal Re-Inspection Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$125.00		Pest Inspection Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
Contractor Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		Plumbing Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
Roof Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		Septic Cert Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
HOA Transfer Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		VOE Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	
VOD Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00		EOI Direct Fee : <input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00	

Comments:

Enter Comments Here

20. Click “OK”.



Important Information

- Before the Closing Disclosure can be ordered:
 - The loan must be Approved by Underwriting
 - The Appraisal must be Approved by Underwriting
 - The Interest Rate must be Locked
 - The Estimated Closing Date must be within 10 Calendar Days



THANK YOU FOR VIEWING

For further B.O.L.T. Training, please visit <https://www.mwfwholesale.com>