

Submitting A Closing Request for Docs

This guide provides the requirements and steps for submitting a closing request for docs in the LOS.

What's Required?

- ✓ **Loan Status** must be **"UW – Clr to Cls"** and **Lock Exp** must be good through funding date. This can be found on the **OpenClose Homepage**; on the **Top Navigation Bar**.

- ✓ **Initial Closing Disclosure (ICD)** has been sent. This information can be found by clicking on the **Loan Action Menu** > click **Submit to Doc Provider**. On the **Submit Loan To Doc Provider** screen in the **Package Type** dropdown select **Retrieve E-Signed Documents** > click the **Process** button. Then on the **Retrieve E-Signed Documents** popup locate the in the **Package Type** column **ClosingDisclosure**. This is verification that the ICD has been sent.

Package ID	Package Type	RESPA Status	Package Status	Created	Actions
90710134	ClosingDisclosure	Consented	SIGNED	6/22/2022 8:34 AM	[Icons]
90342673	Redisclosure	Not consented	CONSENTED	6/8/2022 1:49 PM	[Icons]
90228262	Predisclosure	Consented	SIGNED	6/4/2022 12:39 PM	[Icons]

- ✓ **UW approval cannot be expired**. On the Top Navigation Bar, click on the blue I circled icon > on the **Loan Information** screen, scroll down to the **UW Status / Expiration** section and the **Underwriting Status** and the **Approval Expiration date** are located here.

UW STATUS / EXPIRATION DATES	
Underwriting Status:	Approved-Clear to Close
Lock Expiration:	12/6/2021
Approval Expiration:	12/6/2021

Completing the Closing Request Screen

Step 1 - From **Loan Actions Menu** > click **Closing Request**

Step 2 – On the **Closing Request** screen, complete the following:

- In the **Closing Date Requested** section, complete the **Date & Time > Package Due By Date > Package Signing Type**. See below **IMPORTANT** information:
 - The **Closing date / time** cannot occur less than 24 hours after the request is made.
 - Requests submitted after 6:00pm EST will be processed the next business day & the 24-hour requirement will apply accordingly
- Next, complete all applicable information in the **Location Requested** section.
- Add any comments in the **Comments** section
- Click **Submit** button

Closing Request

Loan Actions (60028384) LNID: 60028384	Loan Status: Origination Lock Status: Float Approved	Channel: Retail Lock Exp:	Rate: 3.125 % APR: 3.130 %	DTI: 14.398 % HCLTV: 90.000 % Score: 720	Search
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Send Options

Borrower Harry Homeowner SSN: 789-12-3456 Home Phone: Work Phone: Cell Phone: Email: Preferred Contact Method:	Subject Property I Don't Know Lane Clarksville, IN 47129 Est. Closing: 01/31/2022
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1 **Closing Date Requested**

Date: : :
Time: : :
Package Due By:
Package Signing Type:

2 **Location Requested**

Company:
Address:
City:
Tel:
Fax:
Email:
Email Package to:

3 **Comments**