CD REQUEST GUIDE

CLOSING DISCLOSURE REQUEST

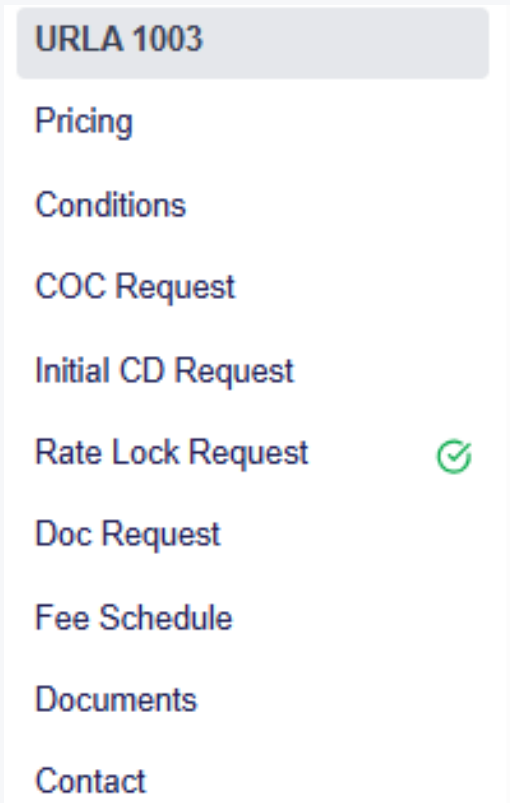
Portal Pipeline | Step-by-step instructions

1. File must be locked and Locked LE sent
2. Locate Initial CD Request
3. Enter all fields and validate the data
4. Upload most updated Settlement Statement and Request CD

01 | CLOSING DISCLOSURE REQUEST

BEFORE CONTINUING

Confirm that file is locked and Locked LE is out. There will be a green check mark next to the Lock Request Button if file is locked.



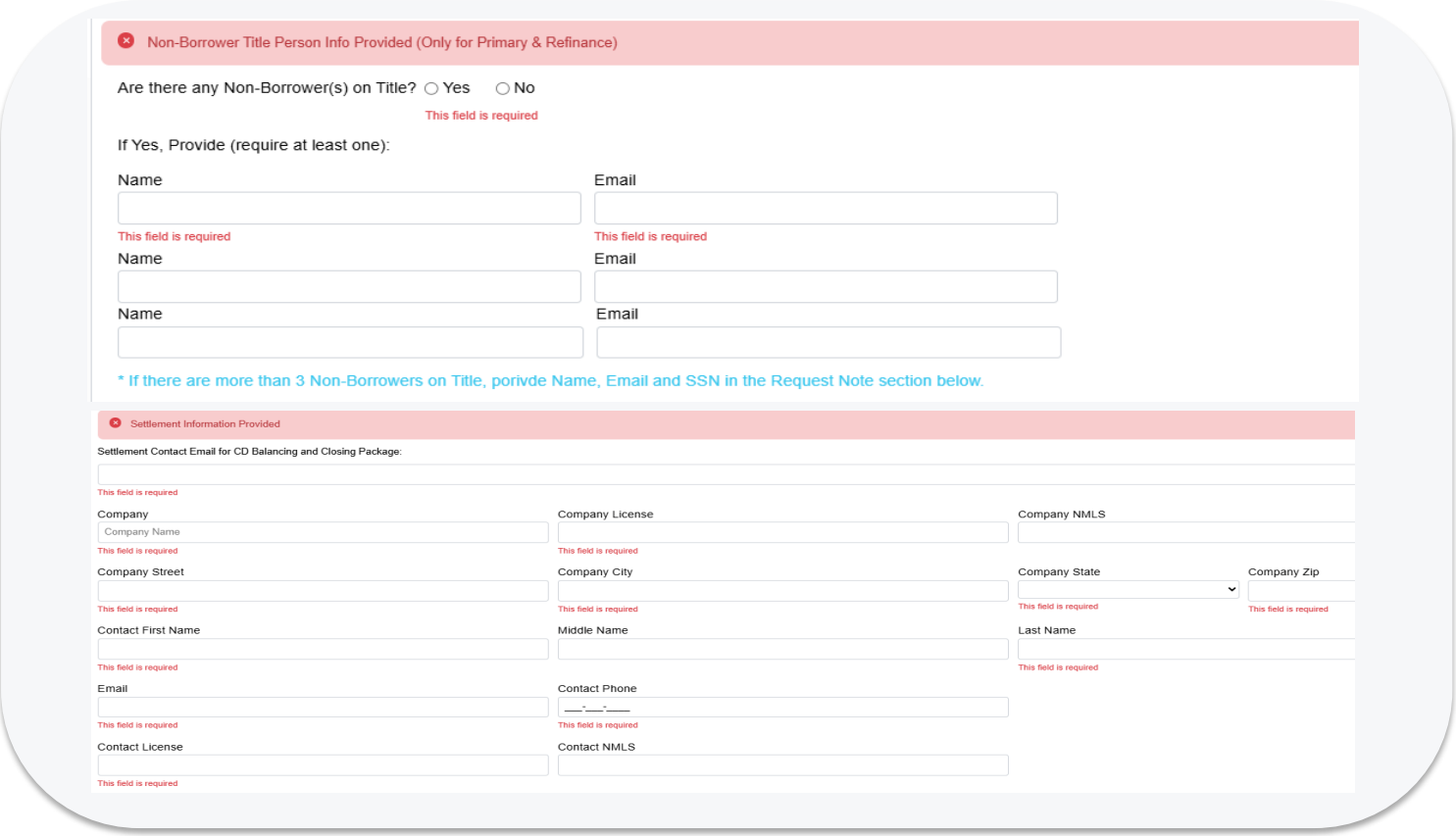
02 | ENTER ALL FIELDS AND VALIDATE THE DATA

- From the left-side menu of the loan file, select Initial CD Request.



03 | ENTER ALL FIELDS AND VALIDATE DATA

- **Enter all fields that are required**



04 | UPLOAD MOST CURRENT SETTLEMENT STATEMENT

Upload Settlement Statement

Click on the white box to open file manager and upload most current settlement statement. Once completed Click on Request Initial CD.

