DOC REQUEST GUIDE

DOC REQUEST

Portal Pipeline | Step-by-step instructions

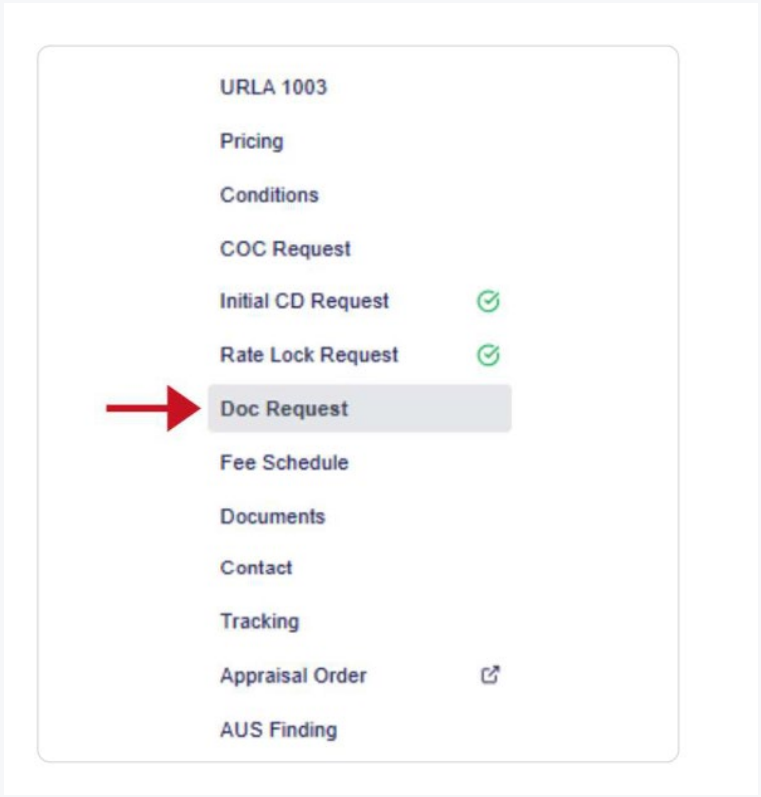
1. Open the Doc Request
2. Complete the Doc Request form
3. Review origination and third-party fees
4. Add notes and upload documents
5. Final review and submit

01 | OPEN THE DOC REQUEST

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

BEFORE CONTINUING

Confirm that you have selected the correct loan file.



02 | COMPLETE THE DOC REQUEST FORM

Review loan information

Check borrower names, loan terms, property details, and program information.

Verify settlement agent

Confirm escrow contact information and any required dates.



DEMONSTRATION FILE — FICTIONAL SAMPLE DATA					
Estimated Closing	11/15/2026	Estimated Funding	11/17/2026	First Payment	01/01/2027
Broker					
Broker	Sample Home Lending LLC		Broker NMLS	DEMO — NOT REAL	
Account Executive	Jordan Example		Phone	(202) 555-0142	
Borrower(s)					
Borrower Name	Alex Sample		Co-Borrower Name	Taylor Sample	
Loan Information					
Loan Number	DEMO-000123		Property Type	Condominium	
Loan Purpose	Purchase		Impound	Escrow Waived	
Purchase Price	$750,000.00		Appraised Value	$750,000.00	
Loan Amount	$600,000.00		LTV / CLTV	80.00% / 80.00%	
Program Code	Sample 30-Year Fixed		Interest Rate	7.250%	
Vesting	Alex Sample		Comp Plan	Lender Paid	
Property Address	123 Example Lane, Sample City, CA 90000				
Settlement Agent Information					
Settlement Agent	Example Escrow Services		Main Contact	Casey Demo	
Escrow Phone	(202) 555-0164		Email for Loan Docs	docs@example.com	
A. Origination Charges					
Type	LO Compensation from Lender		Original Amount	$12,000.00	

TRAINING EXAMPLE ONLY — ALL NAMES, CONTACTS, AND LOAN DETAILS ARE FICTIONAL

Fictional training example

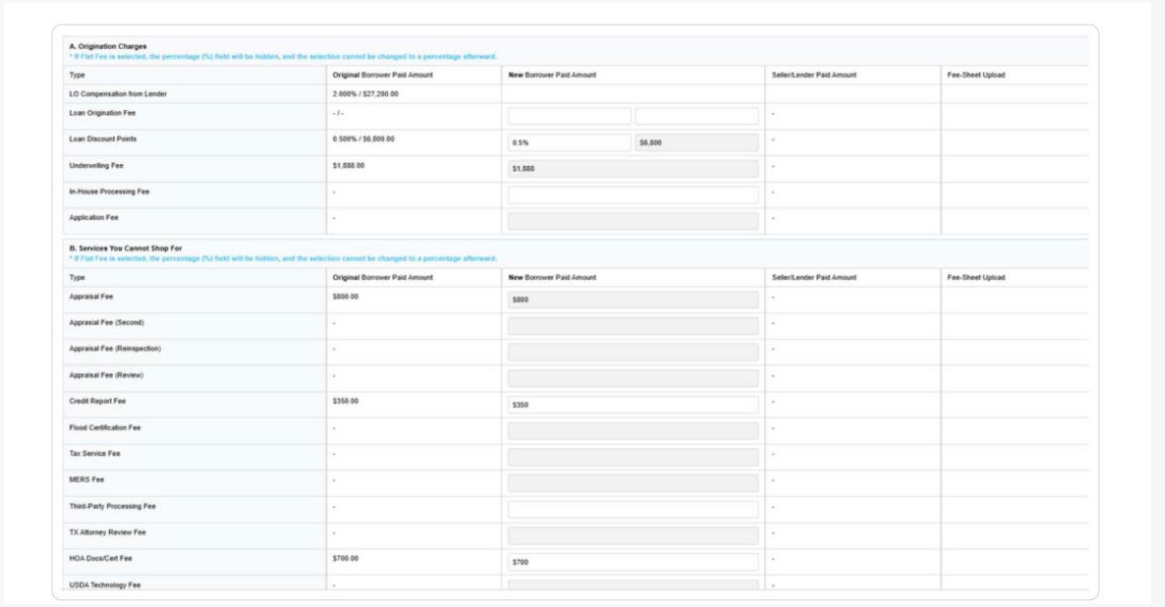
03 | REVIEW ORIGINATION & THIRD-PARTY FEES

Section A | Origination Charges

Double-check LO compensation. LPC cannot be edited; BPC may be reduced.

Section B | Third-Party Fees

Review initially disclosed fees. Supporting invoices are required.



A. Origination Charges

* If Flat Fee is selected, the percentage (%) field will be hidden, and the selection cannot be changed to a percentage afterward.

Type	Original Borrower Paid Amount	New Borrower Paid Amount	Seller/Lender Paid Amount	Fee-Sheet Upload
LO Compensation from Lender	2.000% / $27,200.00			
Loan Origination Fee	- / -		-	
Loan Discount Points	0.500% / $6,800.00	0.5% $6,800	-	
Underwriting Fee	$1,088.00	$1,088	-	
In-House Processing Fee	-		-	
Application Fee	-		-	

B. Services You Cannot Shop For

* If Flat Fee is selected, the percentage (%) field will be hidden, and the selection cannot be changed to a percentage afterward.

Type	Original Borrower Paid Amount	New Borrower Paid Amount	Seller/Lender Paid Amount	Fee-Sheet Upload
Appraisal Fee	$800.00	$800	-	
Appraisal Fee (Second)	-		-	
Appraisal Fee (Reinspection)	-		-	
Appraisal Fee (Review)	-		-	
Credit Report Fee	$350.00	$350	-	
Flood Certification Fee	-		-	
Tax Service Fee	-		-	
MERS Fee	-		-	
Third-Party Processing Fee	-		-	
TX Attorney Review Fee	-		-	
HOA Docs/Cert Fee	$700.00	$700	-	
USDA Technology Fee	-		-	

04 | UPLOAD DOCUMENTS & SUBMIT

- **Add Doc Request notes**

  Provide instructions for the document drawer or closer.

- **Upload supporting files**

  Attach invoices, Pre-CDs, settlement statements, and other relevant documents.

- **Final review & submit**

  Verify the details and select Request a Loan Doc.

