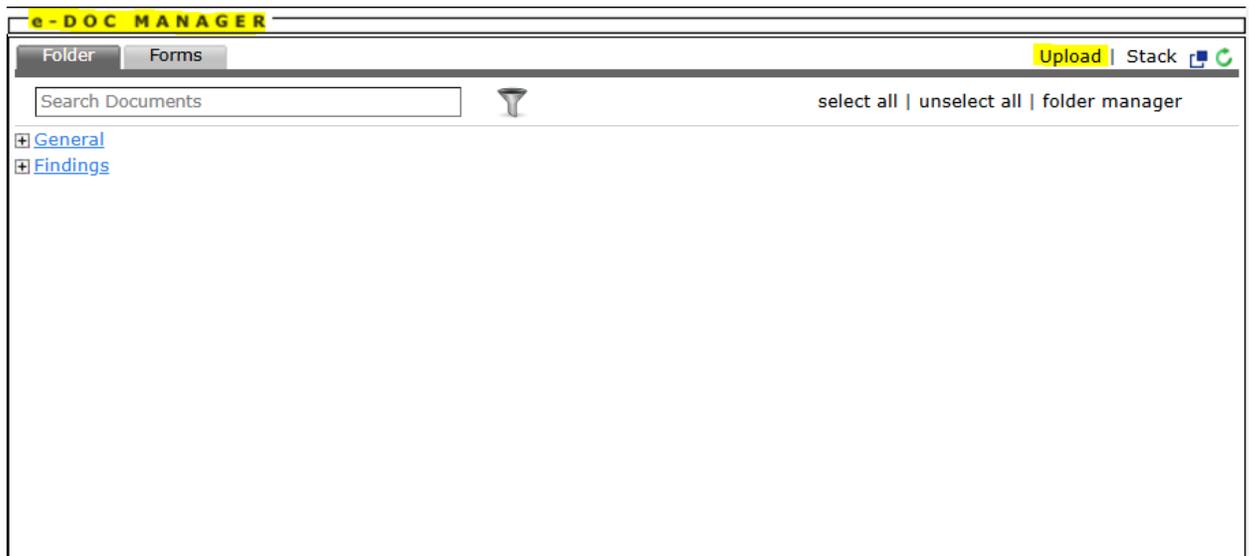***ICD requests***

- **Required loan file status:**
    - Rate locked
    - LE disclosed
    - Conditional approval received
- **Required items for upload to e-DOC MANAGER (**found on **Loan Snapshot** page**):**
    - **Purchase** transactions require: Fully executed contract
    - **Refinance** transactions require: Documentation of vesting
    - Prelim title CD or itemized list of title fees
    - Property tax cert
    - HOI, Flood, HO6 (quotes acceptable, binders preferred)
    - MI quote
    - Updated pay off(s)
    - Wiring instructions
    - 3rd party invoices (appraisal, credit, processing, VOE, etc...)

Continued on next page...>

- **Required steps to submit request:**
  - Select **Loan Actions> Loan Info** from the **Loan Snapshot** page

Loan Snapshot For Ken Customer

| Loan Actions (321041) LNID: 321041 | Loan Status: Origination Lock Status: Float Approved | Channel: Wholesale Lock Exp: | Rate: 7.375 % APR: 7.584 % | DTI: 19.653 % HCLTV: 88.235 % Score: 800 | Search Loa |

Homepage
Pipeline Summary
Loan Snapshot
Loan History
Loan Info
Loan Contacts
Edit 1003
Edit Fees Worksheet
Request Documents
Edit TIL
Edit 1008
Price / Lock
Fee Sheet
HMDA
Update Loan
Export Loan
Cancel Loan
Processing
Submit to Processor
Upload Documents
Send DocLink Request

Order Credit
Submit to Lender
Closing Request
Order Appraisal
Merge Liabilities
Fraud Filter
Flood Certification
Submit To Doc Provider
Compliance
Services

Subject Property
123 Main
Haralson, GA
30229

Application Date:	10/15/2024 (TRID2)(URLA 2020)
Lender Loan#:	321565
Published Docs History	
Term:	360
Current APR:	7.584
%:	n/a
Bottom:	19.653%
HCLTV:	88.235%
Closing:	12/6/2024
Exp:	

88.235%

0003210410

- o Select the **Contacts** tab and fill in parties to the transaction
    - ▪ *Please include*: company name, individual name, address, telephone, email and license # for: closing agent, realtor and broker
    - ▪ *Helpful tip* – you can search and add existing parties already in our database by selecting the business card icon for each section
        - If your party is not already in our database, you can add them from **Loan Actions**> **Loan Contacts** so they will be there for future use**.**
    - ▪ **Save** at the bottom of the page before exiting

o   Select **Loan Actions**> **Fee Sheet** (*Do **not** confuse with* **Edit Fees Worksheet**)

Loan Snapshot For Ken Customer

| Loan Actions (321041) LNID: 321041 | Loan Status: Origination Lock Status: Float Approved | Channel: Wholesale Lock Exp: | Rate: 7.375 % APR: 7.584 % | DTI: 19.653 % HCLTV: 88.235 % Score: 800 | Search Loa |

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Subject Property
123 Main
Haralson, GA
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24	Application Date:	10/15/2024 (TRID2)(URLA 2020)
00	Lender Loan#:	321565
00	Published Docs History	
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	Bottom:	19.653%
/ 88.235%	HCLTV:	88.235%
n	Closing:	12/6/2024
oved	Exp:	
0003210410		

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- Select **Merge Fees Worksheet**
  - Fees will populate from most recently disclosed LE
  - Escrows do not populate, only fees need to be saved
  - Edit fees as necessary
    - Save
    - Submit

Borrower Name	Ken N Customer, JR
Borrower SSN	500-50-7000
Co-Borrower Name	
Co-Borrower SSN	
Property Address	123 Main, Haralson, GA 30229
Originator	Eric Gentry
Processor	

Settlement Agent	
Contact	
Phone	
Fax	
Email	
Address	
City State Zip	
Notes	

Fee Information: ➕ Add Fee   ➕ Merge Fees Worksheet

Fee Description	# Months	Total Charge	Amount POC	Amount Due	Paid By

Save   Save and Return to Loan Snapshot   Submit   Print

- Fee Sheet has been successfully submitted if time stamped
- This can be confirmed under **e-DOC MANAGER**

- Requests are processed within 24 hours of submission
  - Next business day if submitted before 3 pm ET
- Inquiries reagrding submitted ICD reqeusts should be directed to your AE
- An assigned closer will communicate via email with items needed or corrections