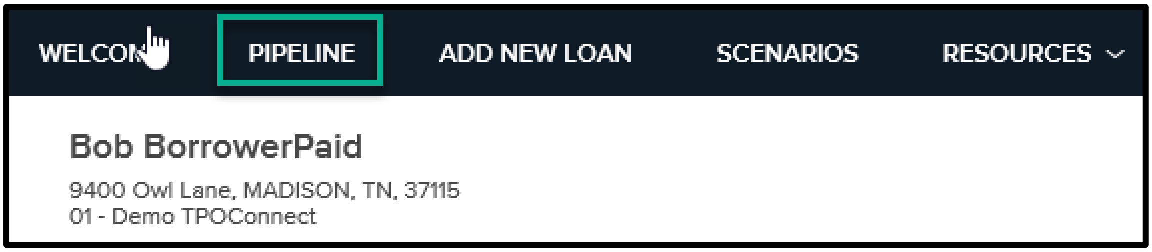
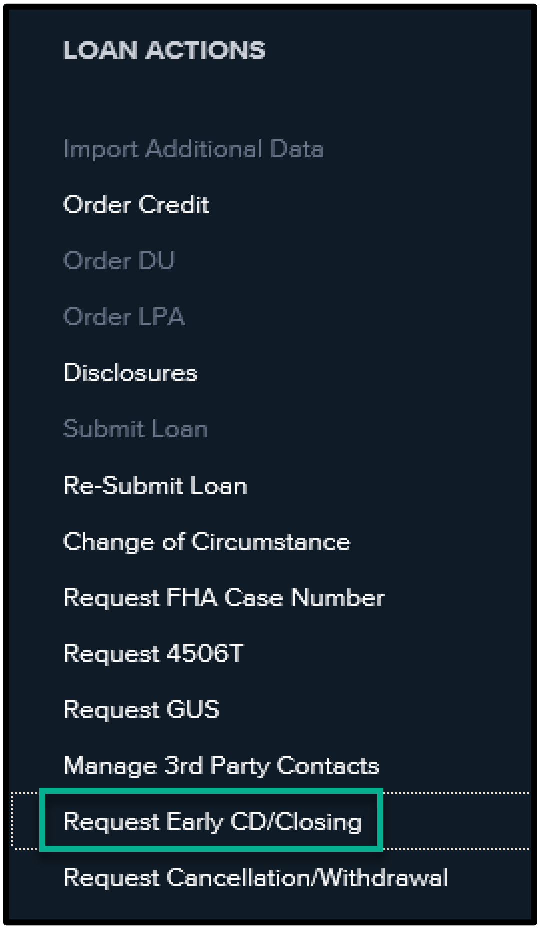
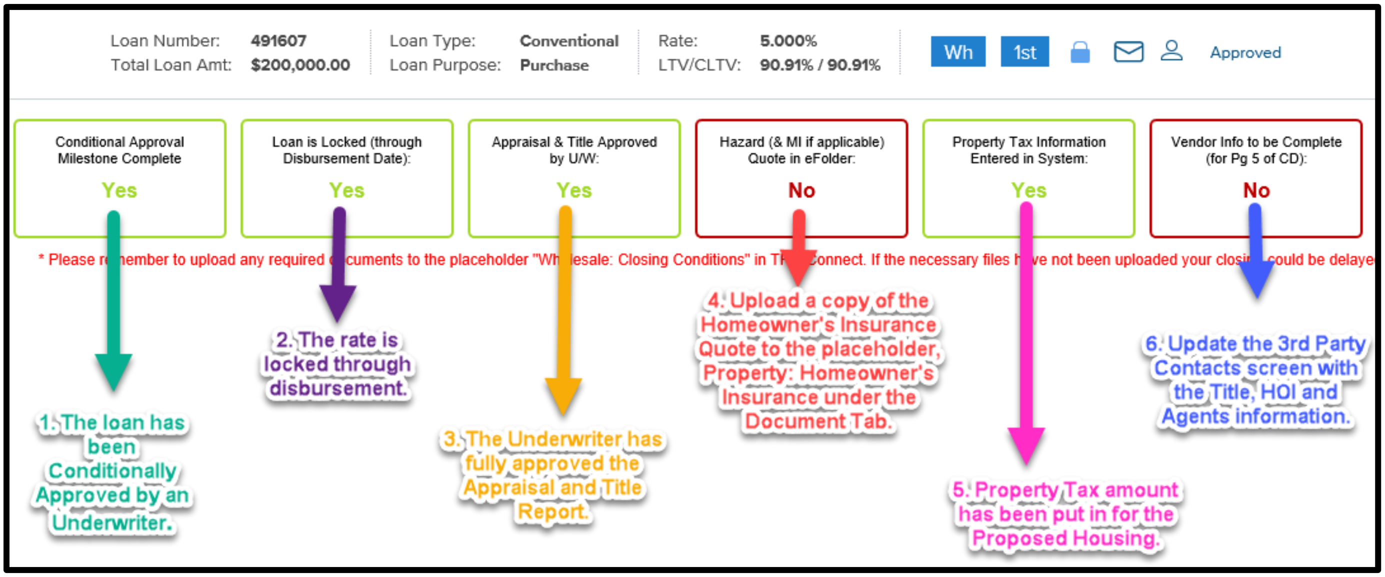
HOW TO: Request an Early CD / Closing

Step 1: Access your loan from the pipeline in TPO Connect and scroll down to Loan Actions and click on Request Early CD/Closing.

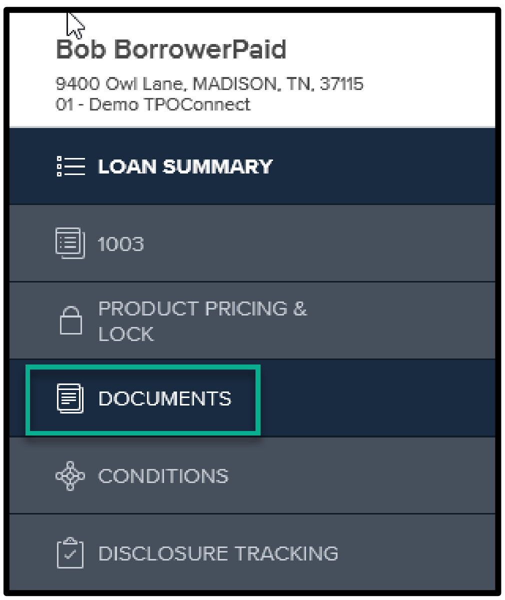




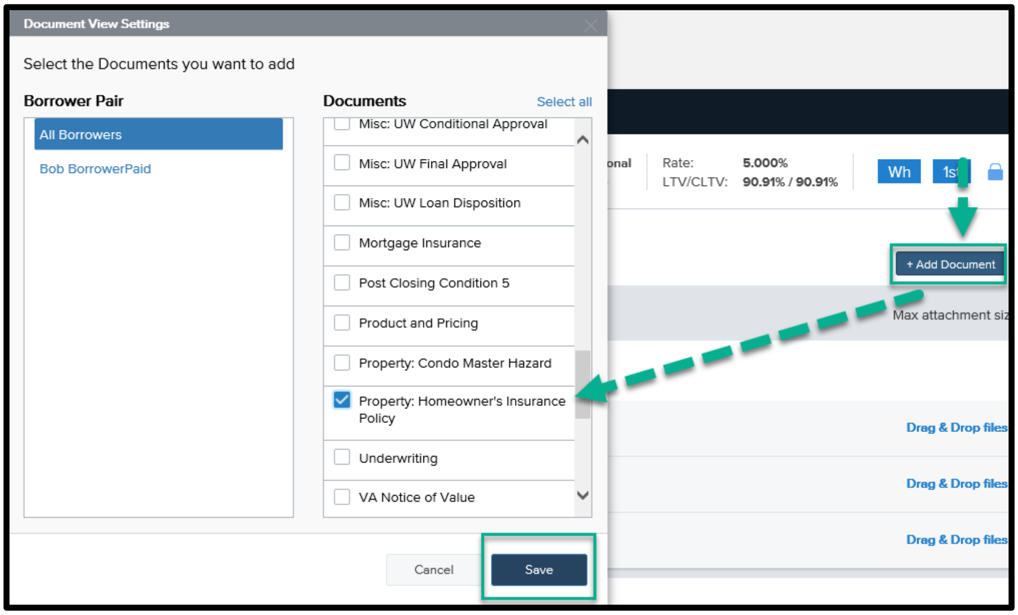
Step 2: At the top of the screen, you will see a 'YES' or 'NO' for the required items to request an Early CD or Closing.



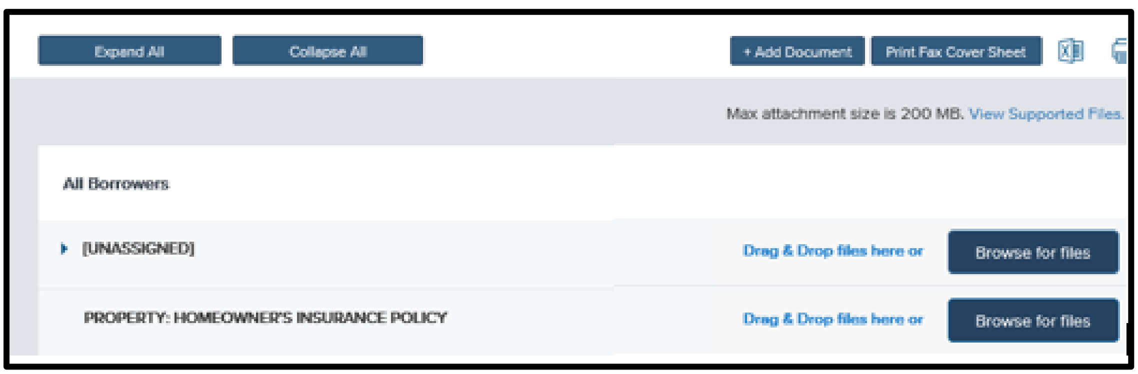
Step 2A: In order to flip the NO to a YES for the Hazard Quote in eFolder – go to the Documents Tab on the left in TPO.



- Click on the Add Document button at the top of the screen. A pop-up will appear, scroll through and locate the placeholder Property: Homeowner's Insurance Policy and click on the box next to it and hit Save.

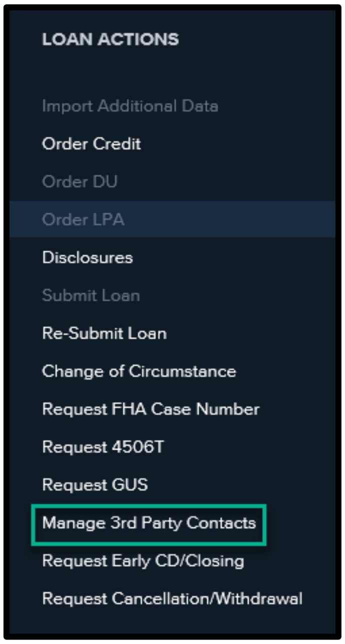


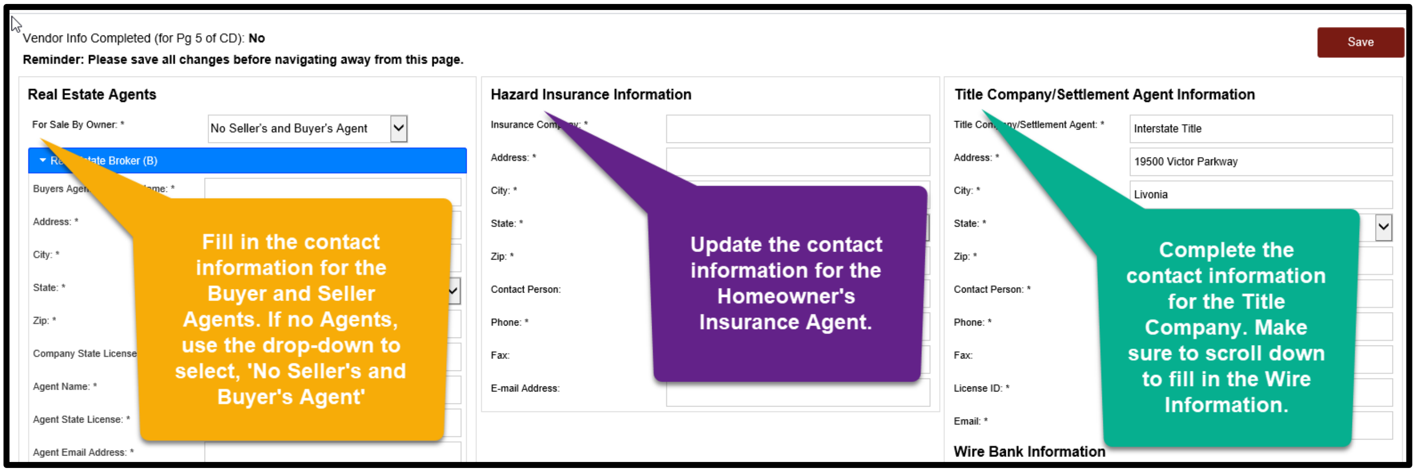
- After the placeholder has been added, click on Browse for Files and add the Homeowner's Insurance quote.



- Once successfully uploaded, go back to the Request Early CD/Closing screen and the NO will flip to a YES.

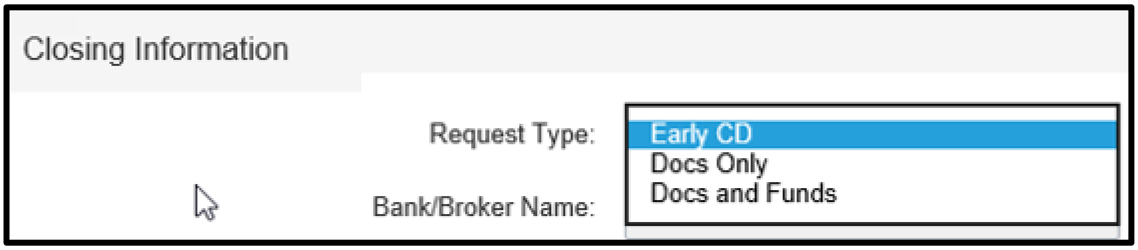
Step 2B: To receive a YES for the 'Vendor Info to be Completed' you will go to the screen Manage 3rd Party Contacts under Loan Actions.





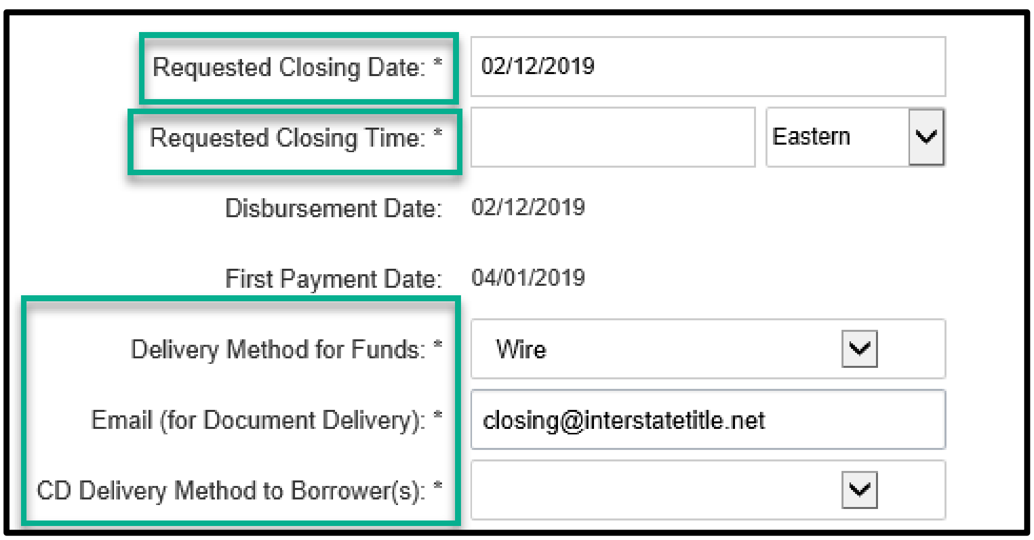
- Make sure to fill in any required fields that have an asterisk next to it.
- Make sure to hit Save at the top right corner!
- Once all the fields are completed, the No will flip to a Yes in the top left corner.

Step 3: Once you have received all of your YES's – use the drop down to select your request type.



- Early CD will be used if you have all of your YES's but the loan has not been final approved by an Underwriter yet.
- Once an Early CD has been requested, an additional drop-down of COC CD will be available if needed.

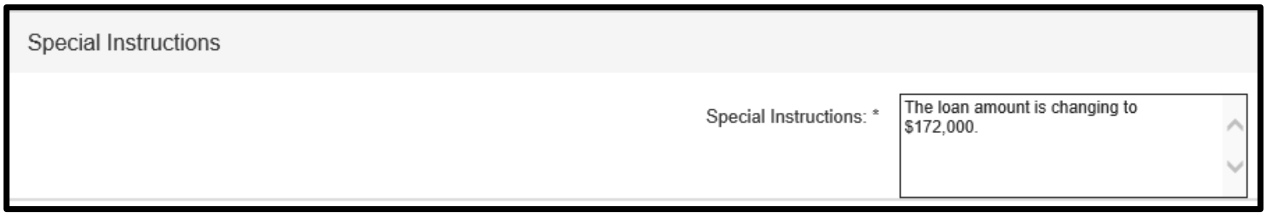
Step 4: After you select your request type, scroll down and fill in the remaining required fields.



- You will be required to select the closing date and time on each request. The closers use this date to prioritize their day and ensure that any CDs that need to go out are sent within compliance time frames and not to delay closings.

Step 5: Complete the Requester Information at the bottom – your contact phone number and e-mail address are required for any additional questions the closers may have.

Step 6: Use the Special Instructions box to pass along any important facts or changes regarding the closing to the closers.

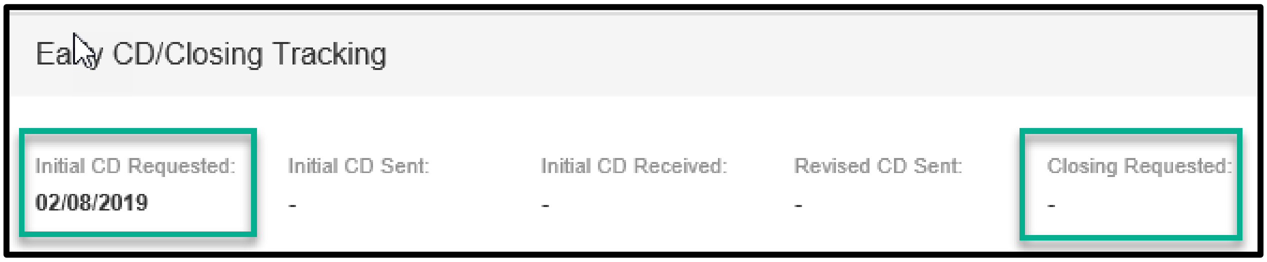


Step 7: After all the required fields are completed, click the Request button at the bottom.

- If a required field is missing, you will receive a red bar at the top and it will let you know which field is empty.

- If the request went through successfully, you will receive a green banner at the top.

- A date will populate next to either Initial CD Requested or Closing Requested under Early CD/Closing Tracking.



Important Note: Even if you have already requested an Early CD, you must go in and request your closing (Docs Only or Docs and Funds from the drop-down) after you have received your final approval from the Underwriter. Please confirm that all the information is still correct and click the Request button at the bottom.