



JOB AID: Requesting a Rate Lock Extension/Re-Lock

Practical guidance for CWL brokers & partners

Community Wholesale Lending

Version: 1.0 Date: 08/25/2025

Community Wholesale Lending
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JOB AID: Requesting a Rate Lock Extension/Re-Lock

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1. Overview

This job aid provides step-by-step guidance on requesting rate lock extensions and re-locks within the CWL systems.

2. Step-by-Step Instructions

1. Loan Snapshot Screen

- Navigate to the loan snapshot screen

COMMUNITY WHOLESALE LENDING

Welcome Mary - Logout
My AE: Test Test 18884754005 keith@cwllend.com

My Pipeline Quick Pricer Guidelines Forms Job Aids Appraisal Dashboard Support My Account

Loan #: 8000252308 - Andy CWL-Test
Loan Amount: \$320,000 Loan Purpose: Purchase
Property Address: 123 Broadway Blvd. San Diego CA
Loan Program: 30 YR FIXED FNMA CWL

Loan Snap - Andy CWL-Test

Disc Sent Loan Setup In Underwriting On Hold Approved Suspended CD Ordered Condition Review Clear to Close Docs Ordered Docs Out Docs Back Funded Post-Funding

View 1003 Loan Summary UW Package Liability Report Assets & Income Report Disclosure Report Conditions Documents **Requests** Request Appraisal

Loan Summary

Borrower: Andy CWL-Test Email: info@cwllend.com Home Phone: (855) 222-5555 Work Phone: (855) 249-5689 Cell Phone: (855) 222-5555 Co Borrower: Amy CWL-Test Property Address: 123 Broadway Blvd. San Diego, CA 92108 Broker: Mary Luck Company: My Lucky Test Broker Phone: (909) 123-4567	Loan #: 8000252308 Loan Purpose: Purchase Loan Amount: \$320,000 Rate: 7.125% Loan Status: Disc Request Loan Program: 30 YR FIXED FNMA CWL Monthly P&I Payment: \$2,155.90 Total Monthly Payment \$2,727.52 (PITI) Lender Case #: 8000252308	Lock Price: 99.803 Appraised Value: \$400,000 LTV: 80.000 CLTV: 80.000
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Application Dates	TRID Dates	Closing Dates
1003 Date: 07/09/25	Intent To Proceed:	Clear To Close Date:
Document Dates	Last Disclosed LE Date: 07/09/25	Estimated Closing Date: 08/31/25
Approval Date:	Last Disclosed LE Viewed Date: 07/12/25	First Payment Date: 10/01/25
Approval Expiration:	Last Disclosed LE Signed Date:	Closing Date:
Lock Dates	Last Disclosed CD Date:	Funded Date:
Lock Date:	Last Disclosed CD Viewed Date:	
Lock Expiration:	Last Disclosed CD Signed Date:	

Figure 1. Loan Snapshot screen

2. Request lock extension/re-lock

- Choose the Request option from the loan snap screen

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Figure 2 . Request screen

3. Request lock extension/re-lock

- Choose the Request option from the loan snap screen

The screenshot displays the Community Wholesale Lending user interface. At the top left is the company logo. The top right shows a user profile for 'Mary' with a 'Logout' link and contact information. Below this is a navigation bar with icons for 'My Pipeline', 'Quick Pricer', 'Guidelines', 'Forms', 'Job Aids', 'Appraisal Dashboard', 'Support', and 'My Account'. The main content area shows loan details for 'Loan #: 8000252308 - Andy CWL-Test', including the loan amount (\$320,000), purpose (Purchase), property address (123 Broadway Blvd. San Diego CA), and program (30 YR FIXED FNMA CWL). A progress bar below the details shows the loan's status through various stages: Disc Sent, Loan Setup, In Underwriting, On Hold, Approved, Suspended, CD Ordered, Condition Review, Clear to Close, Docs Ordered, Docs Out, Docs Back, Funded, and Post-Funding. The 'Disc Sent' stage is currently active. Below the progress bar is a horizontal menu with tabs for 'View 1003', 'Loan Summary', 'UW Package', 'Liability Report', 'Assets & Income Report', 'Disclosure Report', 'Conditions', 'Documents', 'Lock', 'Requests', and 'Request Appraisal'. The 'Requests' tab is selected. Under this tab, there is a list of request options: 'Request Change of Circumstance', 'Request Closing Disclosure', 'Request Closing Docs', and 'Request Lock Extension/Re-Lock'. The 'Request Lock Extension/Re-Lock' option is highlighted with a green oval.

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View 1003 Loan Summary UW Package Liability Report Assets & Income Report Disclosure Report Conditions Documents Lock **Requests** Request Appraisal

Request Change of Circumstance
Request Closing Disclosure
Request Closing Docs
Request Lock Extension/Re-Lock

Figure 3. Requesting lock extension/Re-Lock

4. Extension/Re-lock options

- Choose the option to extend or re-lock
- Choose the amount of time you would like to extend/re-lock
- Submit Request

The screenshot displays the Community Wholesale Lending portal interface. At the top, the logo for 'COMMUNITY WHOLESALE LENDING' is on the left, and user information 'Welcome Mary - Logout' with 'My AE: Test Test' and contact details are on the right. A navigation bar contains icons for 'My Pipeline', 'Quick Pricer', 'Guidelines', 'Forms', 'Job Aids', 'Appraisal Dashboard', 'Support', and 'My Account'. Below this, loan details for 'Loan #: 8000252308 - Andy CWL-Test' are shown, including 'Loan Amount: \$320,000', 'Loan Purpose: Purchase', 'Property Address: 123 Broadway Blvd. San Diego CA', and 'Loan Program: 30 YR FIXED FNMA CWL'. A progress bar titled 'Loan Snap - Andy CWL-Test' shows stages from 'Disc Sent' to 'Post-Funding'. A horizontal menu includes 'View 1003', 'Loan Summary', 'UW Package', 'Liability Report', 'Assets & Income Report', 'Disclosure Report', 'Conditions', 'Documents', 'Lock', 'Requests', and 'Request Appraisal'. The 'Requests' section is expanded, showing options for 'Request Change of Circumstance', 'Request Closing Disclosure', 'Request Closing Docs', and 'Request Lock Extension/Re-Lock'. The 'Request Lock Extension/Re-Lock' form has two checkboxes (the first is circled in green), an 'Extend Lock' dropdown set to '-- Select --', a 'Re-Lock for' dropdown set to '30 Days (includes .25% Re-Lock Fee and Worst-Case Pricing)', a 'Comments' text area, and a 'Submit Request' button (circled in green).

Figure 4. Submitting your request

4. Support

Need help? Contact parcsupport@cwlend.com

Need Pricing Options? Contact lockdesk@cwlend.com