



# JOB AID: Requesting Loan Docs

Practical guidance for CWL brokers & partners

**Community Wholesale Lending**

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Version: 1.0   Date: 08/29/2025

Community Wholesale Lending  
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# JOB AID: Requesting Loan Docs

Version: 1.0    Date: 08/29/2025

## 1. Overview

This job aid provides step-by-step guidance on requesting a closing disclosure

## 2. Step-by-Step Instructions

1. Navigate to the Loan snapshot screen  
- Select the requests option

**COMMUNITY WHOLESALE LENDING**

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

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

**Loan #: 8000252930 - Ken Testfile**  
Loan Amount: \$300,000    Loan Purpose: Purchase  
Property Address: 10655 Birch St Burbank CA  
Loan Program: 30 YR FIXED FNMA CWL

**Loan Snap - Ken Testfile**

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   Lock   **Requests**   Request Appraisal

**Loan Summary**

Borrower: Ken Testfile	Loan #: 8000252930	Lock Price: 100.023
Email: amanda.cole@cwleand.com	Loan Purpose: Purchase	Appraised Value: \$340,000
Home Phone: (818) 222-2222	Loan Amount: \$300,000	LTV: 88.236
Cell Phone: (818) 444-1234	Rate: 6.625%	CLTV: 88.236
Property Address: 10655 Birch St Burbank, CA 91502	Loan Status: Disc Request	
Broker: Mary Luck	Loan Program: 30 YR FIXED FNMA CWL	
Company: My Lucky Test Broker	Monthly P&I Payment: \$1,920.93	
Phone: (909) 123-4567	Total Monthly Payment \$2,414.43 (PITI):	
	Lender Case #: 8000252930	

Application Dates	TRID Dates	Closing Dates
1003 Date: 08/29/25	Intent To Proceed:	Clear To Close Date:
Document Dates	Last Disclosed LE Date: 08/29/25	Estimated Closing Date: 09/25/25
Approval Date:	Last Disclosed LE Viewed Date: 09/03/25	First Payment Date: 11/01/25
Approval Expiration:	Last Disclosed LE Signed Date:	Closing Date:

Figure 1. Loan Snapshot

## 2. Closing Docs

- Select Request Closing Docs

Loan Snap - Ken Testfile

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, Lock, Requests, Request Appraisal

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

Figure 2. Requests

## 2. Request Closing Docs

- Complete all fields with a red asterisk (\*)
- Add comments for your closer
- Upload all applicable closing docs

Loan Snap - Ken Testfile

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, Lock, Requests, Request Appraisal

Request Change of Circumstance  
Request Closing Disclosure  
Request Closing Docs

**This loan is not yet Clear to Close. The loan must be Clear To Close before requesting closing documents.**

Estimated Closing Date: \* Target Note Date: \* Power Of Attorney: ☐ Yes ☐ No

Title Only: \*  
Borrowers/Email Addresses: \*  
Vesting: \* -- Select --

Comments:

Below is a list of required documents to request the request closing:

1. Select the desired document to upload.
2. Click **Browse** to locate document or **Drag and Drop** your file in the box below
3. Click **Upload**

Documents	Status	Template
<input type="checkbox"/> MISC. CLOSING DOCUMENTS	Optional	

**Browse** Drag & Drop Files

**Upload**

Note: only .PDF file types are supported. Max file size = 200MB.

Figure 3. Request Closing Docs

### 3. Quick Tips / Common Errors to Avoid

- ✓ Complete any comments for your closer
- ✓ The loan file must be clear to close before docs can be ordered

### 4. Support

Need help? Contact [parcsupport@cwlend.com](mailto:parcsupport@cwlend.com)