

NEW TM CD-DOC PREP SCREEN /Tasking Process

(Revised 09/12/19)

Effective 09/16/19, Transaction Managers/Retail Processors will be required to use the NEW TM CD-Doc Prep Checklist screen in order to trigger for the Initial CD, Initial Doc Prep, and Final Doc Prep tasks.

In the event that you create a task in error, please notify Funding Management and 'cc' Trudy Barton and Stephanie Ponce to have the task removed. Transaction Managers/Retail Processors are **NOT permitted to delete a task** once it has been created. Transaction Managers/Retail Processors may remove the date if in this field if created in error. The convo log should be updated to note that the task was created in error.

TRID LOANS



TM to input the "Initial CD Req Date" once the TM-CD DOC PREP screen and CD CHECKLIST have been completed in full. Populating a date into this field will initiate the following actions:

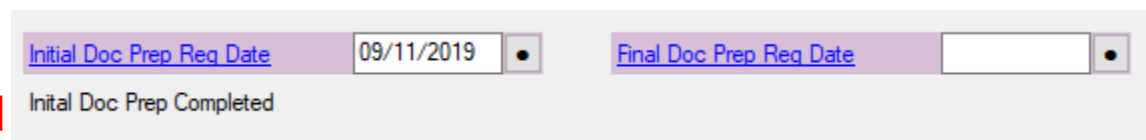
TASK CREATION – TM - Initial Closing Disclosure (CD) Request

SYSTEM WILL ADD A NOTE TO THE CONVO LOG:

CD Request Submitted (Cut off time: WET 12pm PT; DRY 3pm PT)

NON-TRID LOANS

INITIAL DOC PREP REQUEST



TM to input the "Initial Doc Prep Req Date" once the TM-CD DOC PREP screen and CD CHECKLIST have been completed in full. Populating a date into this field will initiate the following actions:

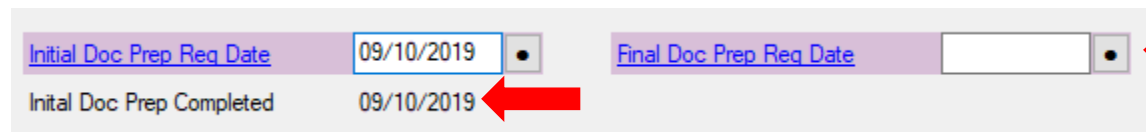
TASK CREATION – TM - Initial Doc Prep - Business Purpose Loan

SYSTEM WILL ADD A NOTE TO THE CONVO LOG:

Initial Doc Prep Request Submitted (Cut off time: WET 12pm PT; DRY 3pm PT)

REMINDER: The "Initial Doc Prep Req Date" is to be used when moving a file to Ready for Docs status **IF** the file has NOT yet had this step completed. **IF** the "Initial Doc Prep Completed" field is populated, then the TM must set a "Final Doc Prep Req Date" when moving the file to a Ready for Docs Status.

FINAL DOC PREP REQUEST



TM to complete the "Final Doc Prep Req Date" when ALL of the following apply:

- TM-CD DOC PREP screen and CD CHECKLIST completed in full
- Initial Doc Prep was previously completed
- File being moved to a READY FOR DOCS status
- Populating a date into this field will initiate the following actions:

TASK CREATION – TM - Final Doc Prep Business Purpose

SYSTEM WILL ADD A NOTE TO THE CONVO LOG:

Final Doc Prep Request Submitted (Cut off time: WET 12pm PT; DRY 3pm PT)