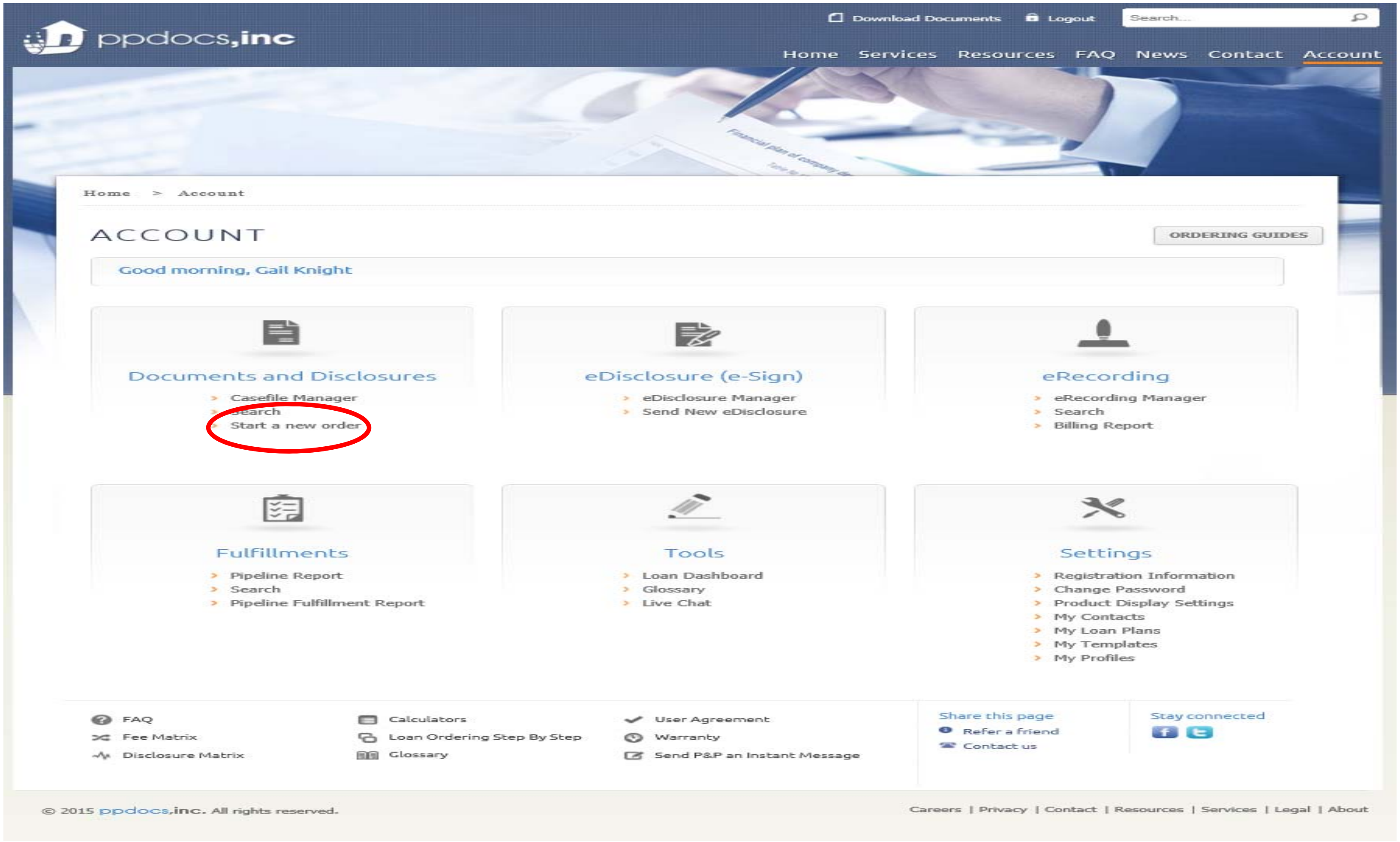
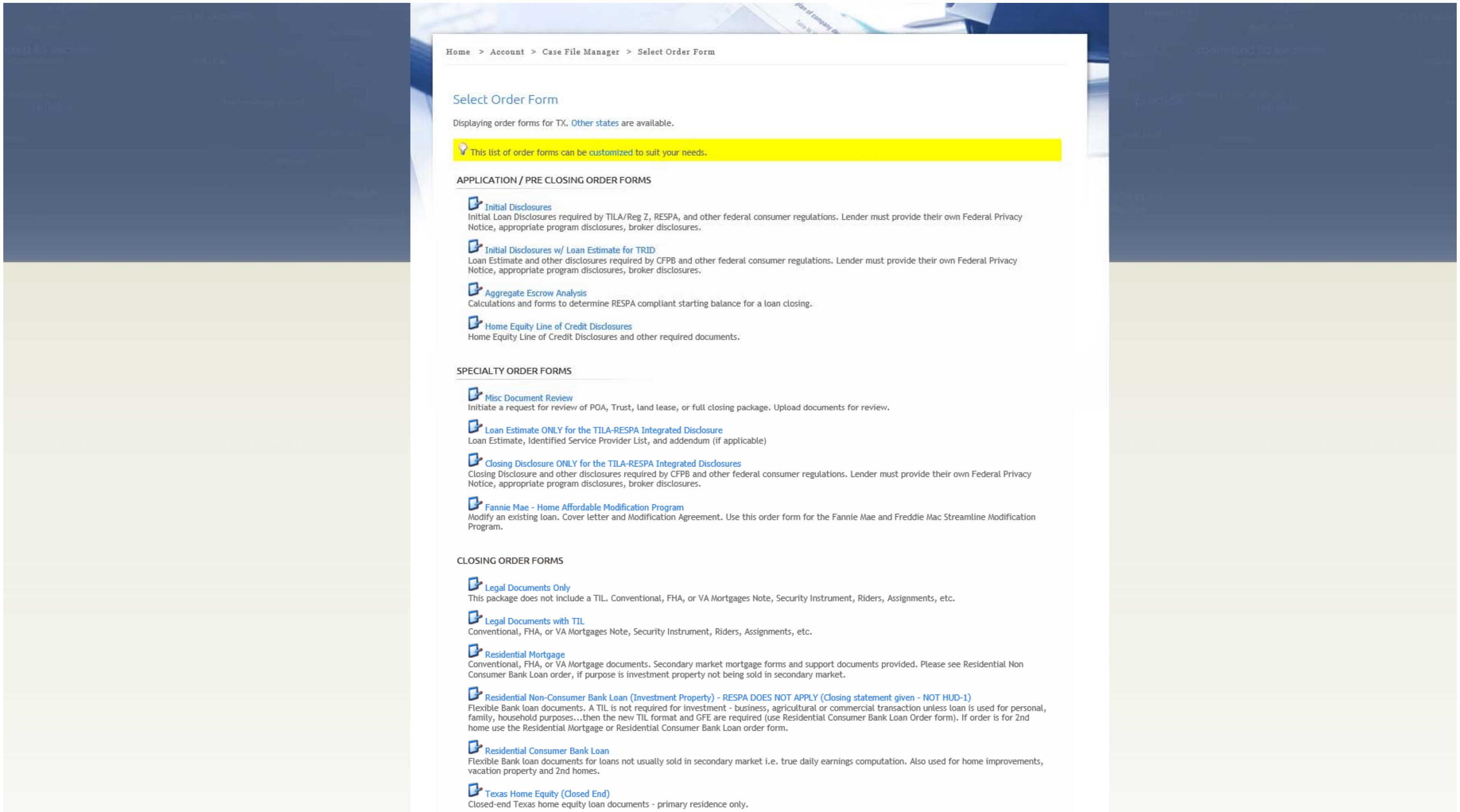
Adding and Editing a Template

ADDING A NEW TEMPLATE:

Login to your Casefile Manager and Start a new order



Select the order form for which you would like to create a template



Home > Account > Case File Manager > Select Order Form

Select Order Form

Displaying order forms for TX. Other states are available.

This list of order forms can be customized to suit your needs.

APPLICATION / PRE CLOSING ORDER FORMS

Initial Disclosures
Initial Loan Disclosures required by TILA/Reg Z, RESPA, and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, broker disclosures.

Initial Disclosures w/ Loan Estimate for TRID
Loan Estimate and other disclosures required by CFPB and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, broker disclosures.

Aggregate Escrow Analysis
Calculations and forms to determine RESPA compliant starting balance for a loan closing.

Home Equity Line of Credit Disclosures
Home Equity Line of Credit Disclosures and other required documents.

SPECIALTY ORDER FORMS

Misc Document Review
Initiate a request for review of POA, Trust, land lease, or full closing package. Upload documents for review.

Loan Estimate ONLY for the TILA-RESPA Integrated Disclosure
Loan Estimate, Identified Service Provider List, and addendum (if applicable)

Closing Disclosure ONLY for the TILA-RESPA Integrated Disclosures
Closing Disclosure and other disclosures required by CFPB and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, broker disclosures.

Fannie Mae - Home Affordable Modification Program
Modify an existing loan. Cover letter and Modification Agreement. Use this order form for the Fannie Mae and Freddie Mac Streamline Modification Program.

CLOSING ORDER FORMS

Legal Documents Only
This package does not include a TIL. Conventional, FHA, or VA Mortgages Note, Security Instrument, Riders, Assignments, etc.

Legal Documents with TIL
Conventional, FHA, or VA Mortgages Note, Security Instrument, Riders, Assignments, etc.

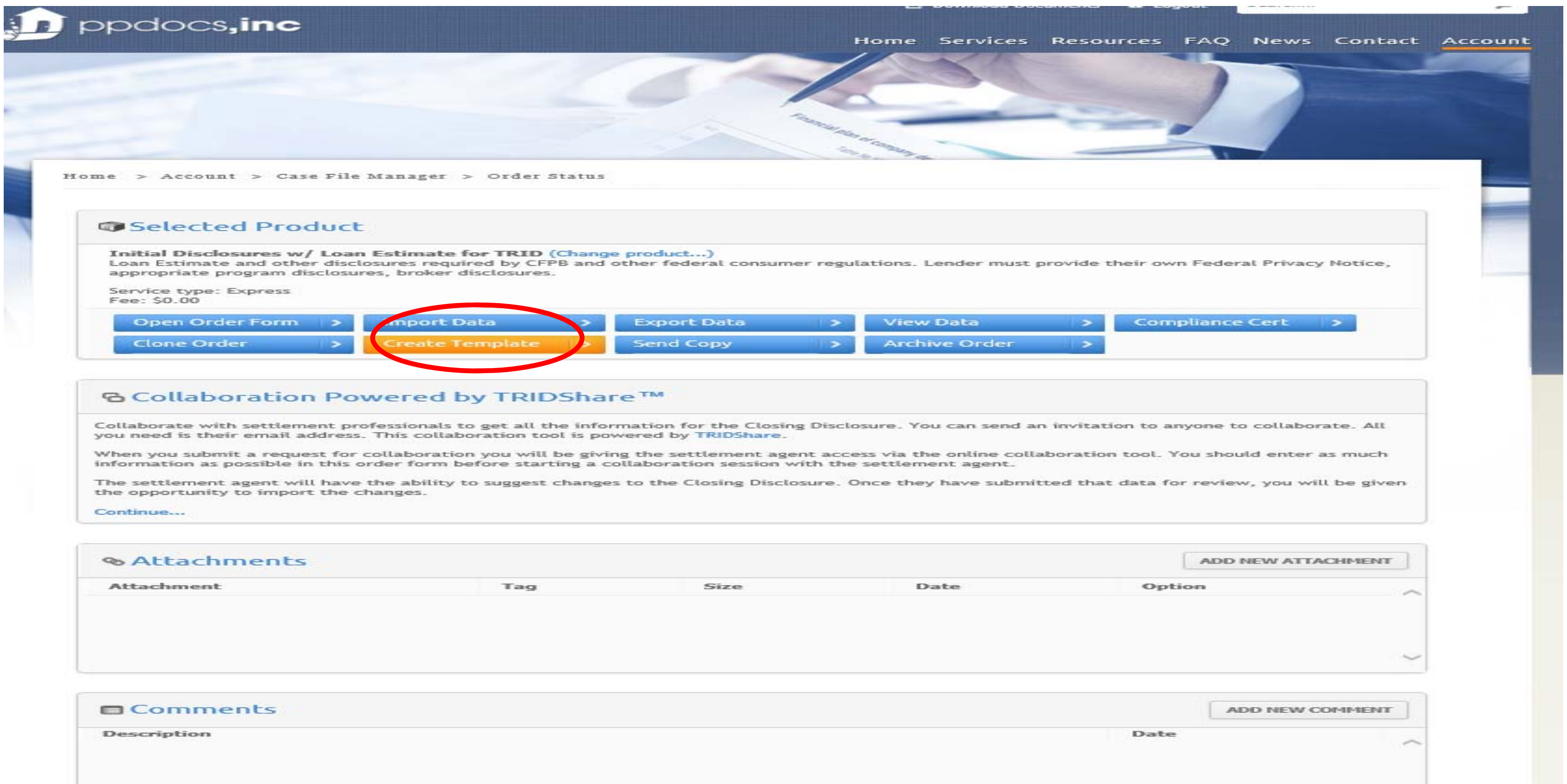
Residential Mortgage
Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Residential Non-Consumer Bank Loan (Investment Property) - RESPA DOES NOT APPLY (Closing statement given - NOT HUD-1)
Flexible Bank loan documents. A TIL is not required for investment - business, agricultural or commercial transaction unless loan is used for personal, family, household purposes...then the new TIL format and GFE are required (use Residential Consumer Bank Loan Order form). If order is for 2nd home use the Residential Mortgage or Residential Consumer Bank Loan order form.

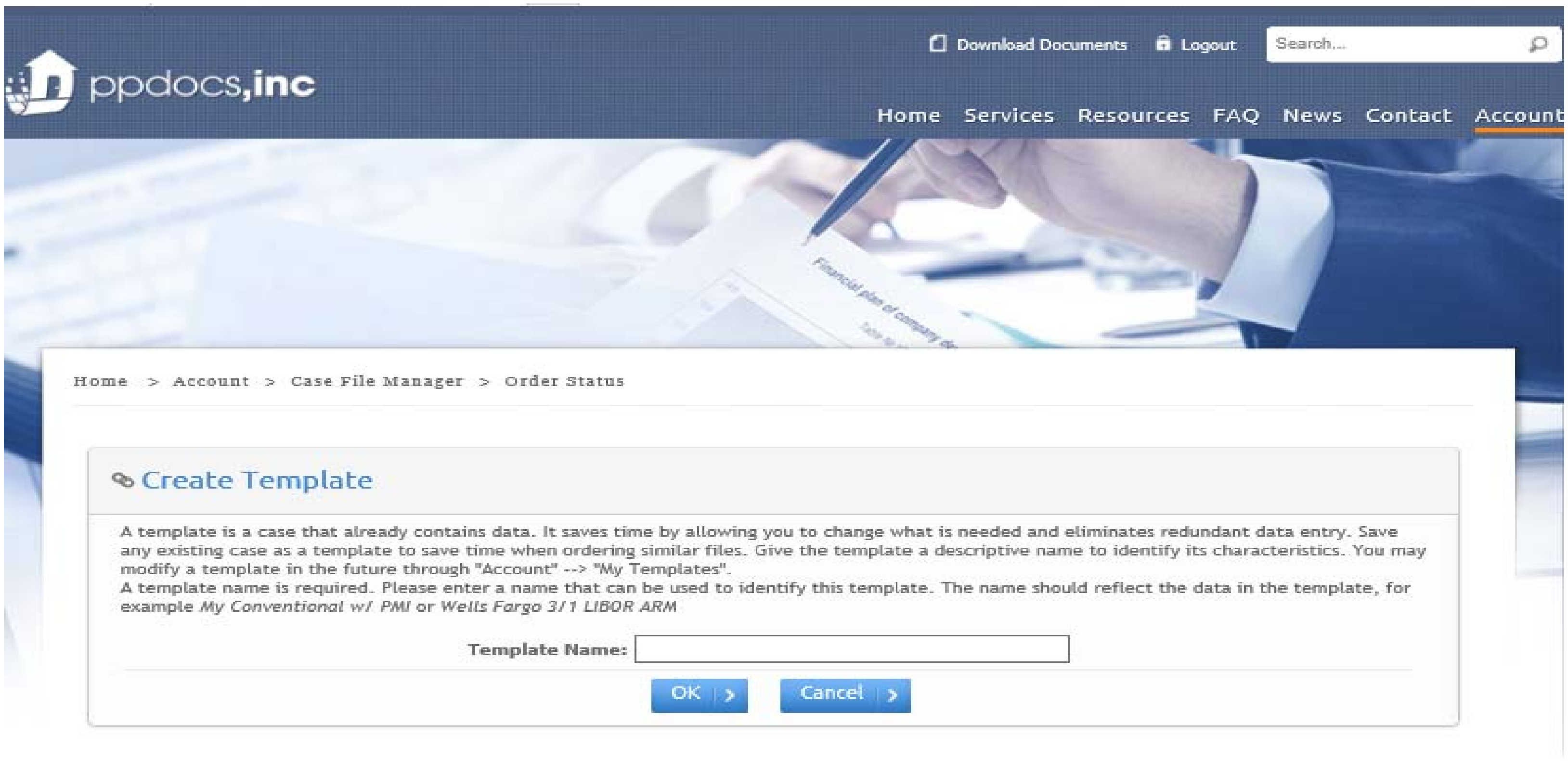
Residential Consumer Bank Loan
Flexible Bank loan documents for loans not usually sold in secondary market i.e. true daily earnings computation. Also used for home improvements, vacation property and 2nd homes.

Texas Home Equity (Closed End)
Closed-end Texas home equity loan documents - primary residence only.

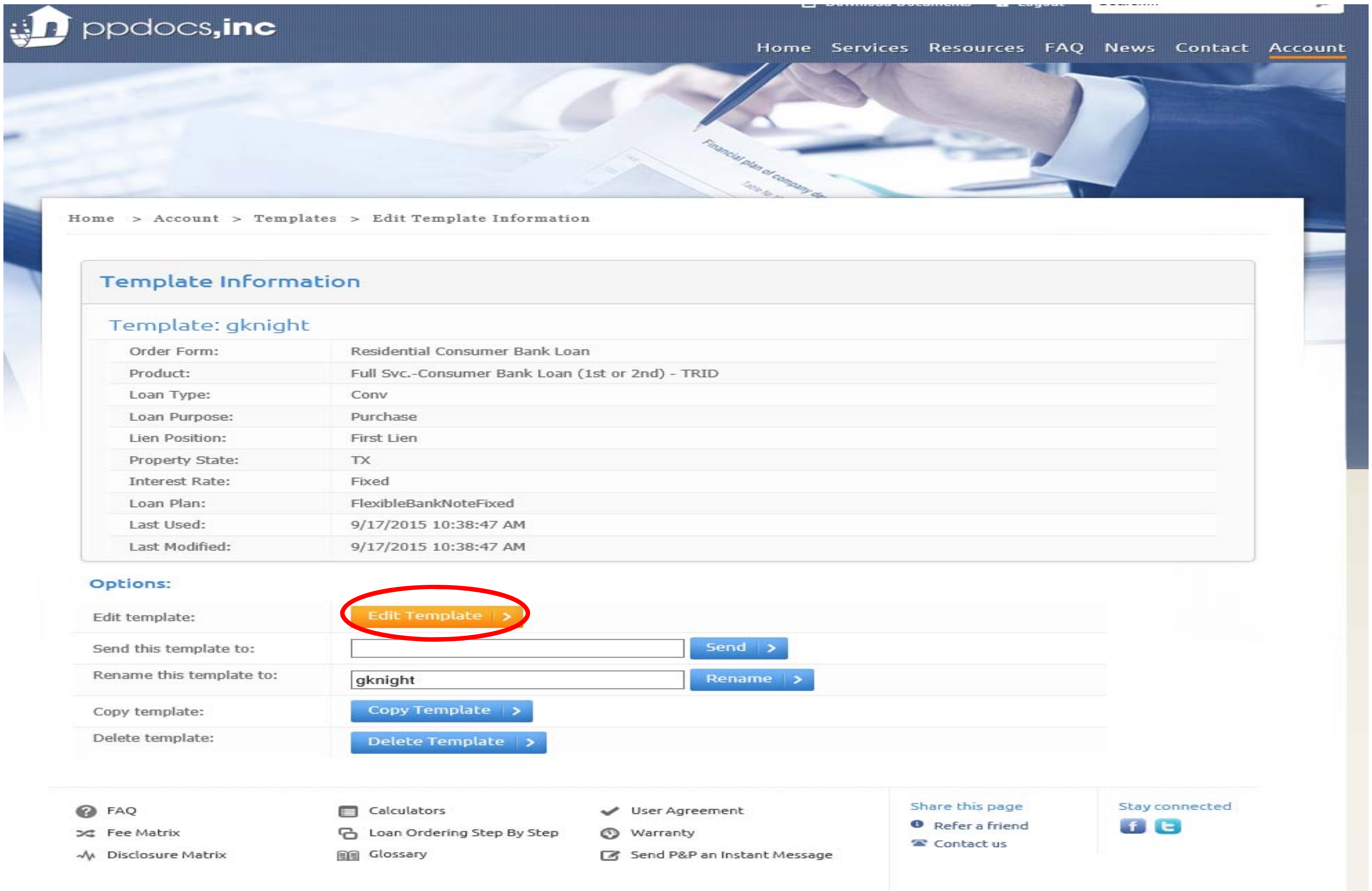
Click “Create Template”



Name the template and click “ok”



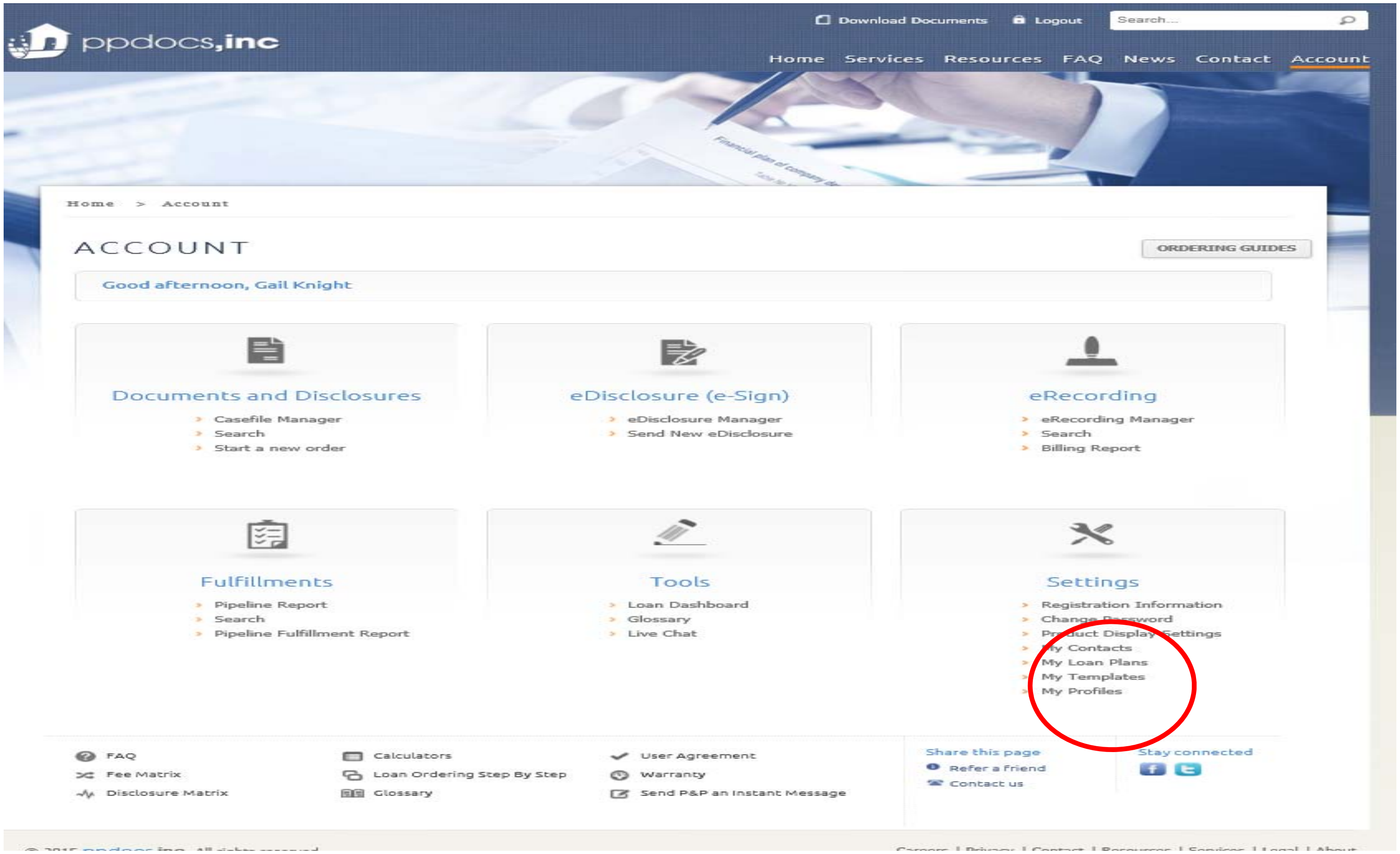
Click "edit template" and begin entering as much information that will apply each time this template is used.



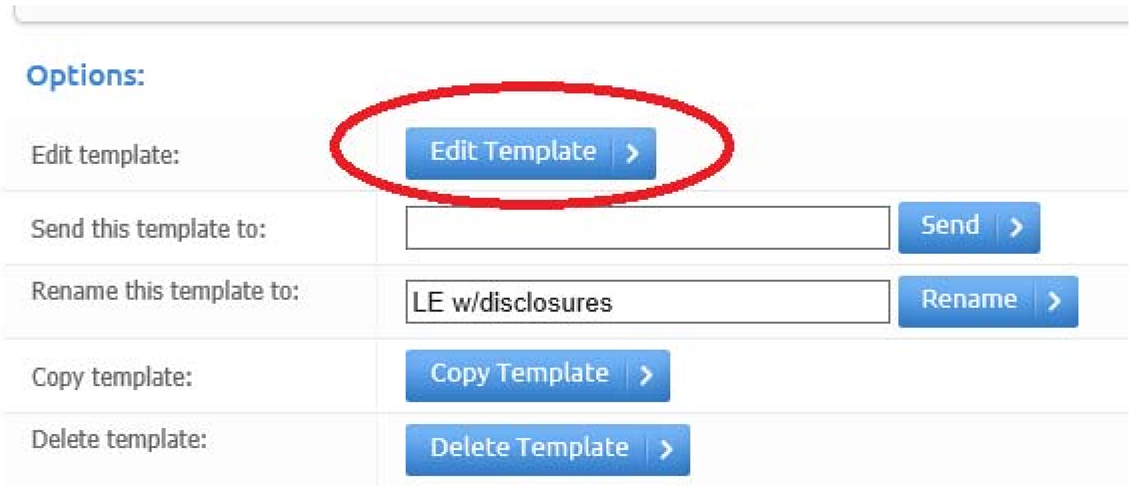
Once you have entered all the information you want included in the template, click "close".

EDITING AN EXISTING TEMPLATE:

From the Account screen, Select “My Templates”



Click on template name you wish to edit then click “Edit Template”



Make any necessary changes throughout the screens then click Save and Close.