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ROBERTSON ANSCHUTZ VETTERS
ATTORNEYS AT LAW

Instructions for Ordering Loan Closing Documents
Docs on Demand Interface with Ellie Mae Encompass

- Enter and verify the loan closing data including borrower information, property information, loan information, loan fees (lender, POC, title company, and third party), title company information, and investor name in Ellie Mae Encompass.
- Send loan closing document order data from Ellie Mae Encompass.

- Open Encompass, select the loan, and select Services | Doc Preparation

First time only – Add “Docs on Demand” to My Providers. Select the All Providers tab, highlight “Docs on Demand,” and click “Add to My List”

- Select My Providers tab, highlight "Docs on Demand," and click Submit.
- Enter your *Docs on Demand* username and password.

If you see an error message about a missing field, then locate the field and enter a value. Note: “All Forms” must be selected under the forms window, or the Loan Submission form containing field 1130 (Lock Plan Code) may not be available.

- a. Click OK and then Cancel to get back into the loan.
- b. Type CTRL+G, enter the Field number, and click "Find" to locate the field that needs correcting.
- c. This will take you to the field that needs correcting.
- d. Only two fields will produce this error: Lender (Borrower Summary screen) and Lock Plan Code (Loan Submission screen). They must be non-blank. If you don't have a Lock Plan Code, then enter an “x” into the Field so that it's non-blank.

If you see an "Incomplete Loan Application" dialog, click Continue.

- You should see a box indicating your request was sent successfully.
- Send supporting documents at RAV's *Docs on Demand* site
 - After receiving via email the interface sweep confirmation, select “Upload Supporting Documents” at the bottom of the email message. If you don't receive the confirmation email message, you may upload supporting documents at Docs on Demand by going to <https://online.docsondemand.com>.
 - Enter the appropriate upload notification email address (closer@ravdocs.com (Houston), ravs@ravdocs.com (San Antonio), or rav-austin@ravdocs.com (Austin)) (if it is not already entered) and browse to the file(s) to be uploaded to *Docs on Demand*.



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- Please upload only the following supporting documents in the stacking order shown below. A loan is assigned for Document Preparation Services upon receipt of a complete order.

Loan Application (1003) - FINAL
Clear To Close - Underwriting Approval
Purchase Contract (if applicable)
Power of Attorney – Borrower (if applicable)
Title Commitment (Schedules A, B & C)
USPS Zip Code Search
Power of Attorney – Seller (if applicable)
Flood Certificate
Appraisal (Pages 1-2 for non-Texas home equity; Pages 1-6 for Texas home equity)
Survey
Lock (include undiscounted note rate if a Discount Point is charged to the Borrower)
Texas Notice Concerning Extensions of Credit – 12 Day Disclosure (if applicable)
FHA Case # Assignment (if applicable)
Mortgage Insurance (if applicable)
Closing Fee Sheet (unless prior agreement for RAV to rely solely on interfaced data)
TRID Loan Estimate (most recently disclosed with change of circumstance form, if applicable)
Settlement Service Provider List (required)
Affiliated Business Arrangement Disclosure (if applicable)
Homeowner's Insurance Policy
Flood Insurance Policy (if applicable)
Wind Insurance Policy (if applicable)
Tax Certificate
HPML or Non-QM Review/Approval (if applicable)

- **Closing Disclosure:** If RAV is preparing the Closing Disclosure, then please confirm/enter the TRID data in the *Docs on Demand* CD Data TRID portal screens. For access, please login to Docs on Demand at <https://online.docsondemand.net> with your *Docs on Demand* TRID account. Then, please click "Check In" in *Docs on Demand* at the top of the screen to check in the loan. Instructions and a short training video for this step may be found at the RAV website Resources page at www.ravdocs.com/resources.aspx.
- **Service Status:** To check the service status, you may view the Loan Status Report in *Docs on Demand*. While viewing the Loan Status Report, you may click on the "DoD #" to open *Docs on Demand* in read-only mode to view the Tracking Information screen, Document Archive screen, and On-Screen Reports, among other screens. If additional information is needed, please email the appropriate Closing Coordinator at closer@ravdocs.com (Houston), ravsa@ravdocs.com (San Antonio), or rav-austin@ravdocs.com (Austin).