



## Retrieving your Closing Disclosure

1. Log into PPDocs and select your (submitted) order in your Doc Prep tab.
  - Note: Your file must be submitted in order to retrieve a live document.

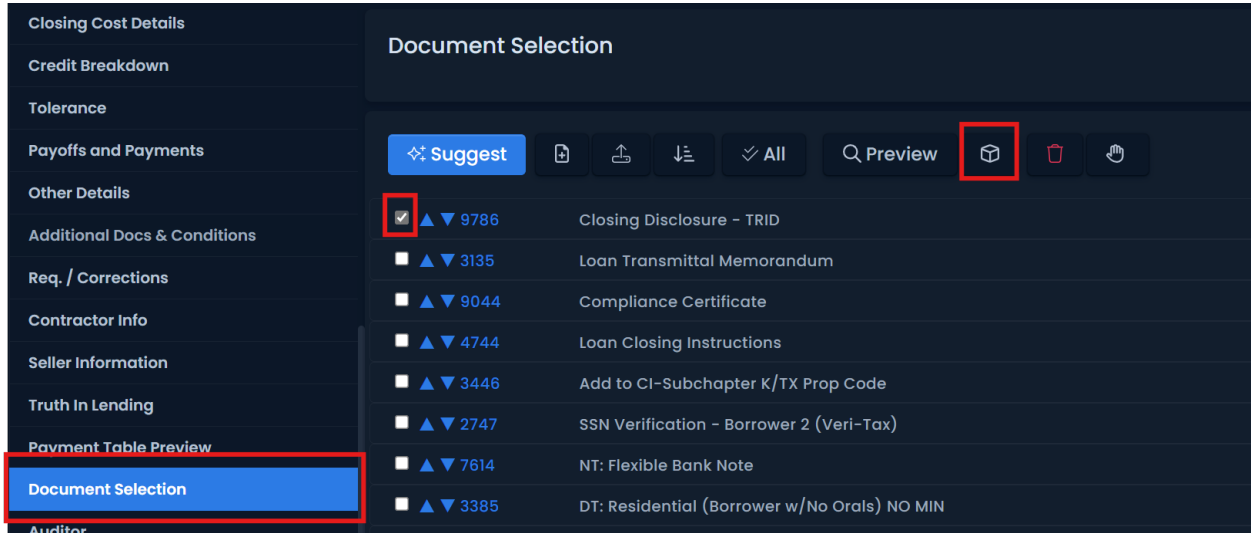
The screenshot shows the PPDocs, Inc dashboard. The left sidebar has 'DocPrep' highlighted with a red box. The main content area displays a table with columns: Borrower, Property, Loan No., Product, and Modified. The 'Borrower' column contains 'Released John Doe', which is highlighted with a red box. The 'Property' column shows '1234 Example Rd', 'Loan No.' is '123456789', 'Product' is 'Borrower Interim Full Svc.-Borrower Interim (1st or 2nd) - TRID', and 'Modified' is '8/13/2024 10:59:36 AM'. The 'Order#' is '202408010415'.

2. Once you have clicked on the borrower's blue name, click "Open."

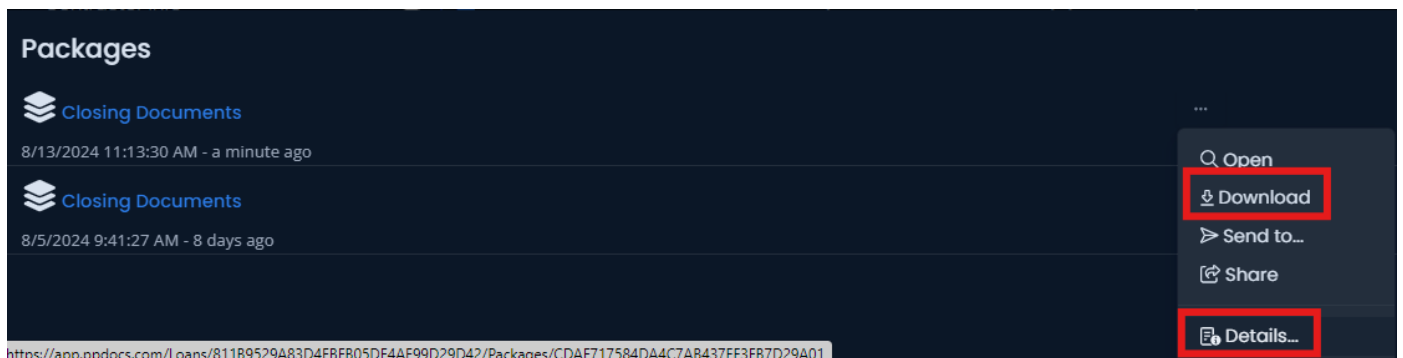
The screenshot shows the borrower profile for John Doe. The profile details include: 'John Doe', 'Borrower Interim (for Interest Only Home Improvement or Initial Residential Construction)', '1234 Example Rd, Arlington, TX 76017', and 'Full Svc.-Borrower Interim (1st or 2nd) - TRID'. The 'Loan Number' is '123456789', 'Created' is '8/1/2024 4:53:35 PM', and 'Modified' is '8/13/2024 10:59:36 AM'. The 'Profile' is 'Brayden'. The 'Open' button is highlighted with a red box.

3. Now that you are in the workflow, scroll down to Document Selection and toggle the box for the Closing Disclosure and click the package icon.

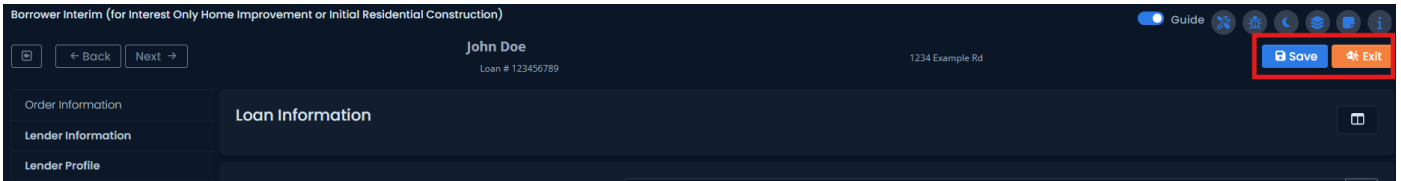
- Note: You must correct the errors before packaging. This includes any unacknowledged audits or failed validations. **Please make sure the question for “Have you provided an initial CD to the consumer?” is marked as “No” on the Loan Information screen, if applicable.**



4. Once you’ve clicked the package button, the bottom of the screen will pull up any packages that have been generated. The three dots menu should be on the right hand side of each package where the user can download it, send it to someone internally, or click details to continue via DocuSign.



5. When you've completed your task, click "Save and Exit" in the top right corner of the screen.



**Don't hesitate to get with our team on any questions or concerns!**

Here is a table to help you navigate your question appropriately:

Type of inquiries	Email Address
Document preparation and status updates on document orders	<a href="mailto:docprep@ppdocs.com">docprep@ppdocs.com</a>
Questions for Legal Document Quality Control Review orders	<a href="mailto:review@ppdocs.com">review@ppdocs.com</a>
Questions for fulfillment orders	<a href="mailto:fulfillment@ppdocs.com">fulfillment@ppdocs.com</a>
Questions about rescission requirements, federal or state predatory lending test questions, guidance for particular scenarios, or other compliance related questions	<a href="mailto:compliance@ppdocs.com">compliance@ppdocs.com</a>
Technical support, bug reporting	<a href="mailto:support@ppdocs.com">support@ppdocs.com</a>
Legal specific questions	<a href="mailto:legal@ppdocs.com">legal@ppdocs.com</a>
Registering, signing up, pricing quotes	<a href="mailto:cr@ppdocs.com">cr@ppdocs.com</a>
Billing, invoicing, credit card payments	<a href="mailto:accounting@ppdocs.com">accounting@ppdocs.com</a>