

EllieMae Disclosing Non-Occ. Co-Borrower

20
19



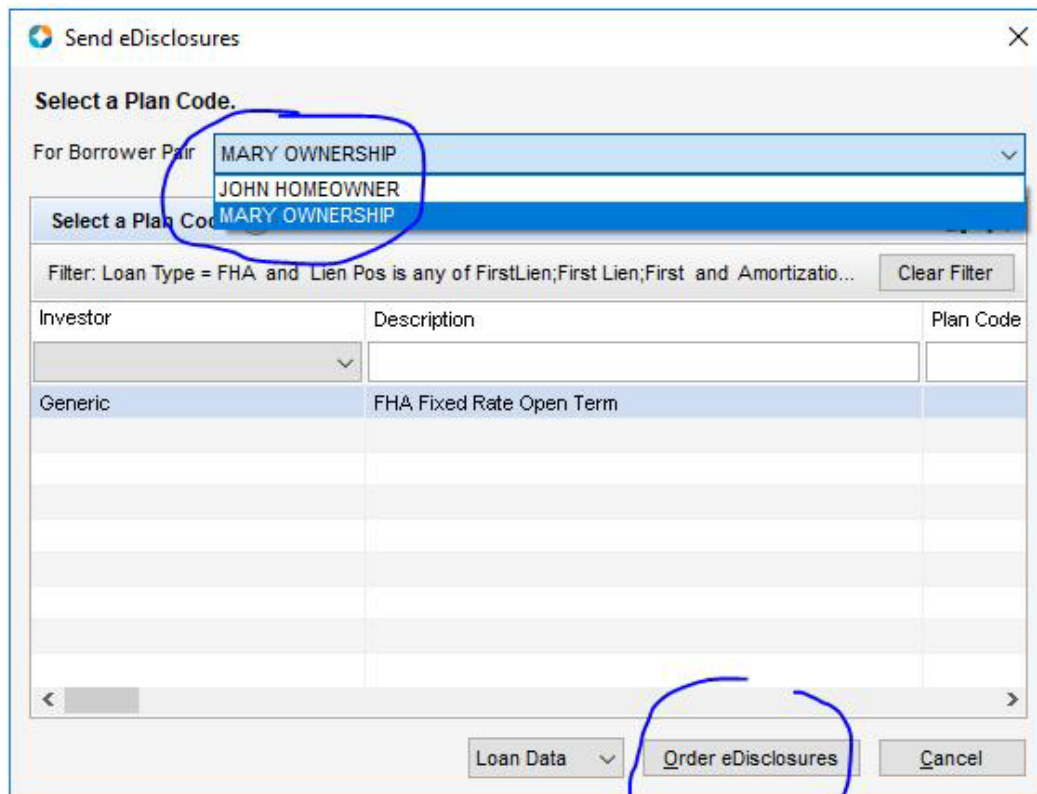
1. Click the **eFolder** button in the top right corner.



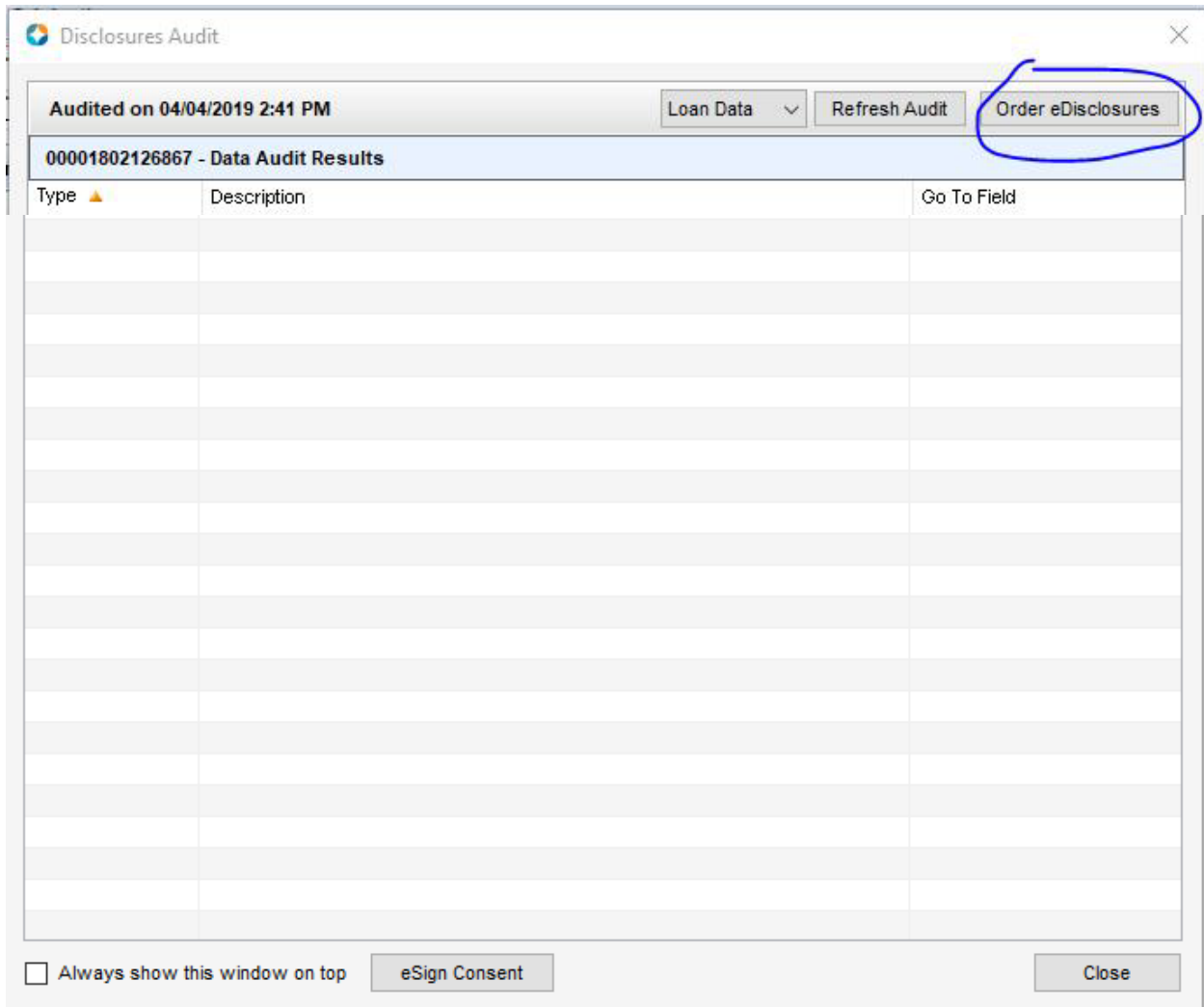
2. Request the initial disclosure package via the **eDisclosures** button.



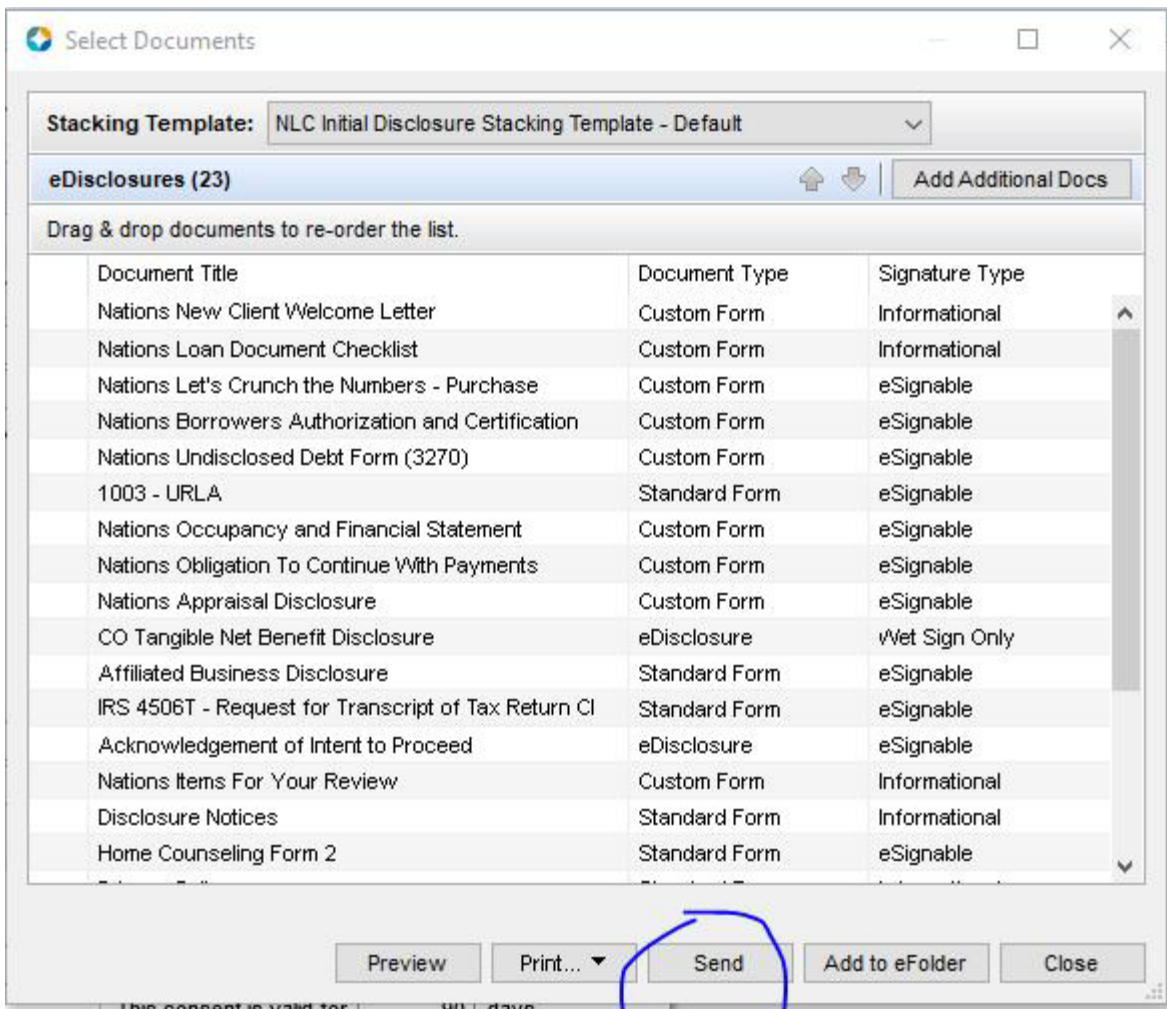
3. When the **Select a Plan Code** window is presented, **SWITCH** to the 2nd Borrower as shown below. Then highlight the program you would like and click the **Order eDisclosures** button.



4. Once the **Disclosure Audit** box appears click the **Order eDisclosures** button.



5. When the **Select Documents** box appears click the **Send** button.



6. Next the **Send eDisclosures** box will appear and click the **Send** box.

Send eDisclosures

Message

Sender Type	Name	Email
Current User	Nicholas George Ap	Nick.Apost@nationslending.co

Recipient Type	Name	Email	Authorization Code
<input checked="" type="checkbox"/> Borrower	JOHN HOMEOWNER	samsam77777@yahoo.com	5000
<input checked="" type="checkbox"/> Originator	Nicholas George Apostole	Nick.Apost@nationslending.com	

* Subject: Nations Lending - eSign Document Request Initial Disclosures

Corbel

Hello <<Recipient Full Name >>,
We're looking forward to processing your home loan, but first, we'll need you to sign a few documents. Below are instructions to help you navigate through the portal.

Login/Create Account

[Click here to login or create an account to access your borrower portal \(link\).](#)

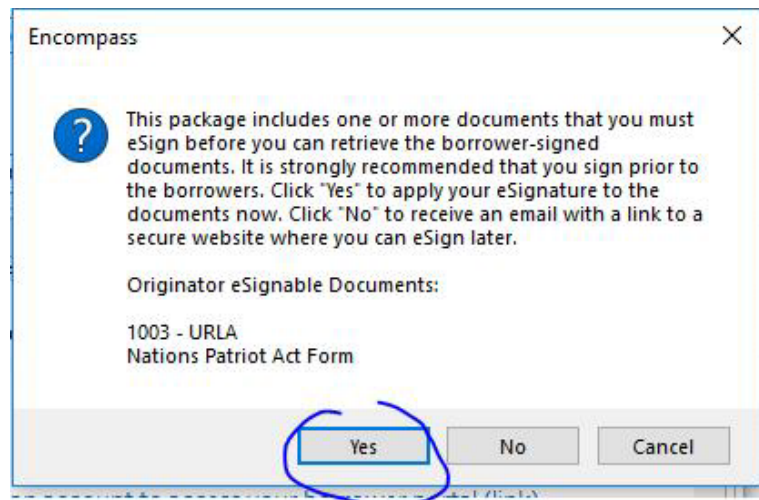
Notify Additional Users (1 Users selected) Notify me when borrower receives the package. Notify me when borrower does not access by 02/19/2018

Borrower Signing Options

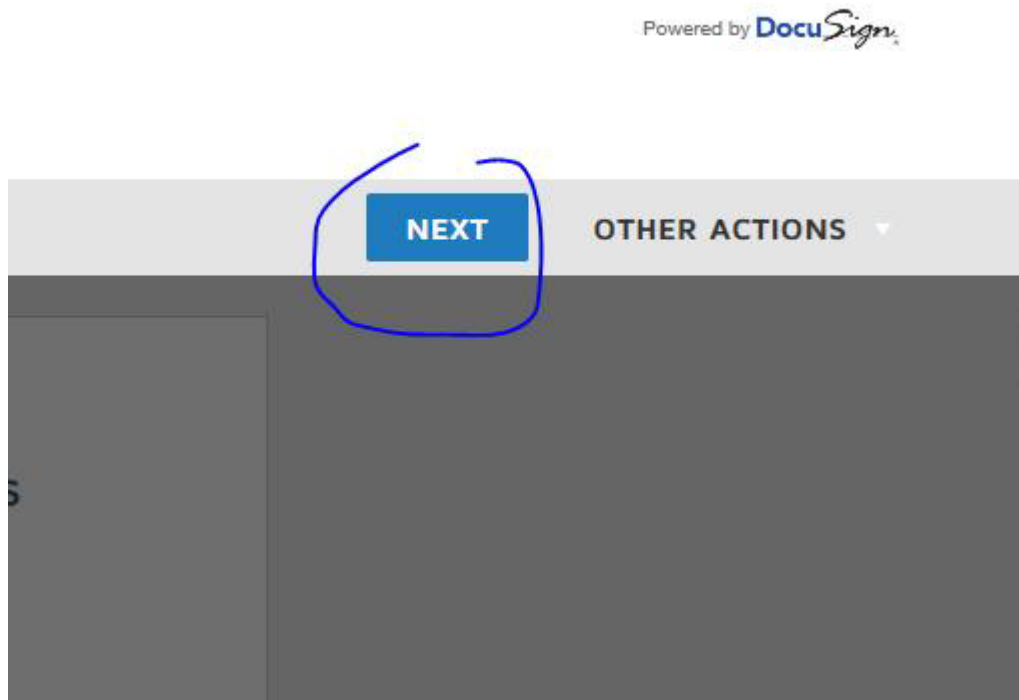
* Borrower Signing Option: eSign (electronically sign and return)

Send Cancel

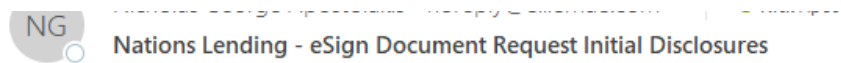
7. Once the signature warning box is presented please click **Yes** to sign the disclosures now.



8. The EllieMae system will send you directly to DocuSign to sign your disclosures.



9. If you have chosen, NO on step 5 above please follow steps 9 & 10. The Loan Officer will need to refer to this email requesting them to sign.



Borrower: **Marisol testcase**
Property Address: **123 main st**
eDisclosure package Sent Date/Time: **2019-04-03 12:54:32**

Dear napost,

This email has been sent to notify you that your signature is required on the package sent on 2019-04-03 12:54:32. It is recommended that you sign the documents as soon as possible. The documents cannot be retrieved to the eFolder until both you and the borrowers sign them.

Nations Patriot Act Form [Click here to sign the documents.](#)

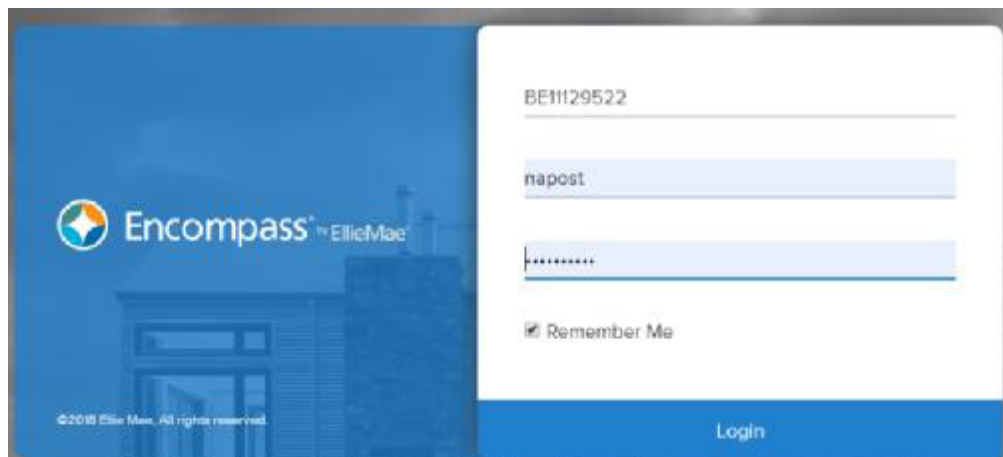
If you experience problems opening the link, copy and paste the URL below into your Web browser.

URL: <https://admin.elliemae.com/encompassconsumerconnect/index.html#/login?loanId=351e0cb7-53ba-4f02-8098-85170bb5c895&packageId=f00498ef-da92-4973-87fc-5296697b86ab>

If you have any questions, please contact us at CustomerSupport@EllieMae.com or 1-800-777-1718.

Sincerely,
Encompass eFolder Team
Ellie Mae, Inc.



10. The Loan Officer will then log into their EllieMae account using their Encompass log in credentials and follow the prompts to eSign their portion of the disclosures.



Retrieving the Signed Disclosures

11. Once the Borrower has eSigned the Loan Officer will receive the email below showing that the disclosures have been signed. At which point the Loan officer can go into the file and retrieve the disclosures.

FROM	SUBJECT	RECEIVED
eFolder@elliemae.com Loan Number: 10001802129933	JOHN HOMEOWNER's loan: eDisclosure package has been eSigned	Thu 4/4/2019 11:58 AM 1

 eFolder@elliemae.com |  Nick Apost, Nick Apost
JOHN HOMEOWNER's loan: eDisclosure package has been eSigned


Loan Number: **10001802129933**
Sent Date/Time: **4/4/2019 8:33 AM PST**
Current Status: **eSigned on 4/4/2019 8:58 AM PST**

Dear Nicholas George Apostolakis,

This email has been sent to notify you that all of the required parties have completed eSigning the package you sent on 4/4/2019 8:33 AM PST.

The document included in this package are:
COVERSHEET
Nations New Client Welcome Letter
Nations Loan Document Checklist
Nations Let's Crunch the Numbers - Purchase
Nations Borrowers Authorization and Certification
Nations Undisclosed Debt Form (3270)
1003 - URLA
Nations Occupancy and Financial Statement
Nations Obligation To Continue With Payments
Nations Appraisal Disclosure
HUD/V.A. Addendum to Uniform Residential Loan Application
V.A. Request for Certificate of Veteran Status

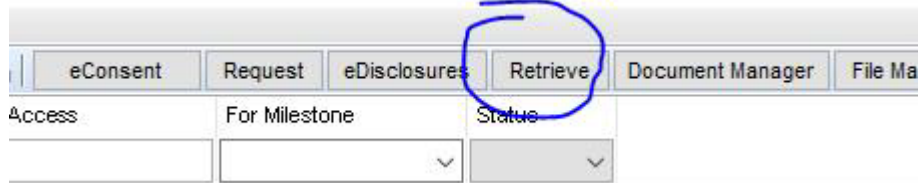
12. The Loan Officer will then go back into the file and click on **eFolder**.



05/31/2019
George Aposto

 eFolder

13. Once in the eFolder click on the **Retrieve** button at the top right of the screen.



14. The Retrieve box will appear, and you will click the **Download** button. All the disclosures will load into their respective folders in the eFolder.

