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WESTGEN LENDING

E-Sign 1003 Enhancement



E-Sign in the TPO Portal

Mortgage Loan Officers (“MLO”) and Mortgage Brokers (“Brokers”) have a new electronic option to execute the 1003 and/or other loan documents on the existing TPO portal.

Step 1

The email communication to the Borrower asking them to e-sign their loan disclosures will trigger an email to the MLO/Broker notifying them that there is a 1003 and/or other loan documents for the MLO/Broker to sign.

Email to Borrower

Send eDisclosures

Message

Sender Type	Name	Email
Current User	Alex Thomas	althomas67@gmail.com

Recipient Type	Name	Email	Authorization Code
<input checked="" type="checkbox"/> Borrower	John Homeowner	althomas67@gmail.com	1234
<input checked="" type="checkbox"/> Originator	Alex Test	atsolutions777@gmail.com	

* Subject: Electronic Loan Document Request

Times New Roman 12 B I U

The **Homeowner** loan application is available to view on my website. It is a secure, password protected website that provides 24-hour access to the status and details of the application. You can also view, sign, and return required documents. Please follow the instructions below.

Please review the following documents (no need to return):

- * Credit Score Disclosure Exception for Loans Secured by One to Four Units of Residential Real Property
- * Your Home Loan Toolkit

Notify Additional Users (0 Users selected) Notify me when borrower receives the package. Notify me when borrower does not access by 05/28/2021

Borrower Signing Options

* Borrower Signing Option: eSign + Wet Sign (for wet sign only documents)

Send Cancel

Email to MLO/Broker

Alex Test: Electronic Loan Document Request

Alex Thomas <noreply@elliemae.com>
to me

May 26, 2021, 8:25 PM (2 days ago)

Borrower: **John Homeowner**
Property Address: **1 Esign Lane**
eDisclosure package Sent Date/Time: **2021-05-26 20:24:56**

Dear 8627996950,

This email has been sent to notify you that your signature is required on the package sent on 2021-05-26 20:24:56. 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.

If you have already completed signing, please ignore this email.
1003 - URLA

MLO/Brokers, please ignore the link in the email and access your e-sign documents directly by logging in to the TPO portal.



E-Sign in the TPO Portal

Step 2

MLO/Broker will log into their TPO website. There is a new E-SIGN tab in the dashboard at the top of the page.

The screenshot shows the WestGen Lending TPO portal dashboard. At the top, there is a dark blue header with the "WG. WESTGEN LENDING" logo. Below this is a red navigation bar with the following menu items: WELCOME, PIPELINE, E-SIGN, ADD NEW LOAN, SCENARIOS, BROKER SUPPORT (with a dropdown arrow), RESOURCE CENTER (with a dropdown arrow), and DOCUMENTS. A yellow arrow points to the "E-SIGN" menu item. Below the navigation bar, the text "Loans Pending eSig" is visible. At the bottom, there is a table with the following headers: LOAN NUMBER, BORROWER NAME, LOAN AMOUNT, and PROPERTY ADDRESS.

LOAN NUMBER	BORROWER NAME	LOAN AMOUNT	PROPERTY ADDRESS
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E-Sign in the TPO Portal

Step 3

A number next to the ESIGN tab will indicate that there is a document for the MLO/Broker to sign. Click the E-Sign tab with the number next to it. This will pull up the MLO/Broker's pipeline. Loans requiring ESIGN will be highlighted. Click on the highlighted loan and the documents requiring E-Sign will appear. E-SIGN the documents requiring signature.

The screenshot shows the WestGen Lending TPO Portal interface. The top navigation bar is dark blue with the 'WG. WESTGEN LENDING' logo on the left. Below the logo is a red navigation bar with the following menu items: WELCOME, PIPELINE, ESIGN 1, ADD NEW LOAN, SCENARIOS, BROKER SUPPORT (with a dropdown arrow), RESOURCE CENTER (with a dropdown arrow), and DOCUMENTS. A yellow arrow points to the 'ESIGN 1' tab. Below the navigation bar, the page title is 'Loans Pending eSign'. A table with four columns is displayed: LOAN NUMBER, BORROWER NAME, LOAN AMOUNT, and PROPERTY ADDRESS. The table contains one row of data.

LOAN NUMBER	BORROWER NAME	LOAN AMOUNT	PROPERTY ADDRESS
10002105009784	Homeowner, John	\$550,000.00	1 Esign Lane Irvine CA 92603

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Questions?

clients@westgenloans.com