



How to Request, E-Sign and View Initial Disclosures -ICE

The following instructions are how a **Broker** will request the initial disclosures package and electronically sign their disclosures.

Submit Request to FIRST COLONY WHOLESALE through FUEL.

- Click on **Loan Estimate** tab on the Loan Tracker.
- When you are ready to request the **Loan Estimate**, click the **Disclosure Actions** button.

The screenshot shows the FUEL loan tracker interface for Loan # 545395. The loan status is 'New' with a note rate of 7.500%. The borrower is Ken DSCR and the loan amount is \$153,675. The loan is in the 'LOAN ESTIMATE' stage, with a progress bar showing 'Requested: --', 'All Borrowers Signed: --', and 'LO Signed: --'. The 'DISCLOSURE ACTIONS' button is highlighted with a red box. Below the progress bar, there is a 'Request Initial Disclosures' section with a 'SELECT LE DOC' button and a 'DISCLOSURE ACTIONS' button highlighted with a red box.

Access the Initial Disclosures Portal:

- Once initial disclosures have been requested, an email is sent to the Loan Officer on loan from noreply-MortgageTech@ice.com titled “E-Sign Your Initial Mortgage Disclosures”.
- Click on **Click here to sign the documents**.

The screenshot shows an email from Ryan McCormick (RM) to Ryan McCormick. The subject is 'Ryan M ABC LO: E-Sign Your Initial Mortgage Disclosures'. The email contains the following information:

- EXTERNAL EMAIL - DO NOT CLICK links or attachments unless you recognize the sender and know the content is safe.**
- Borrower: Ken N Customer JR
- Property Address: 10655 Birch St
- eDisclosure package Sent Date/Time: 2025-09-08 18:13:54

Dear Ryan M ABC LO,

This email has been sent to notify you that your signature is required on the package sent on 2025-09-08 18:13:54. 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 (Initial)
CA Mortgage Brokerage Agreement
[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://firstcolony.encompasspoconnect.com/#/home/pipeline/251b23ab-53a2-4d12-bc9c-b1b539c367d5/esign?packageId=3a5edc77-8d28-4c60-8fce-6f168c174436>

If you have any questions, please contact your system administrator.

Sincerely,
Encompass eFolder Team
Ellie Mae, Inc.



2100 W. PLEASANT GROVE BLVD.
SUITE 100 PLEASANT GROVE, UT 84062
firstcolonywholesale.com

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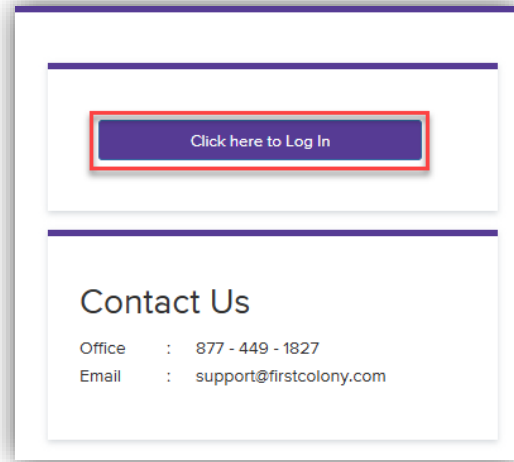
Logging In:

- You will be directed to:

<https://firstcolony.encompasstpoconnect.com/>

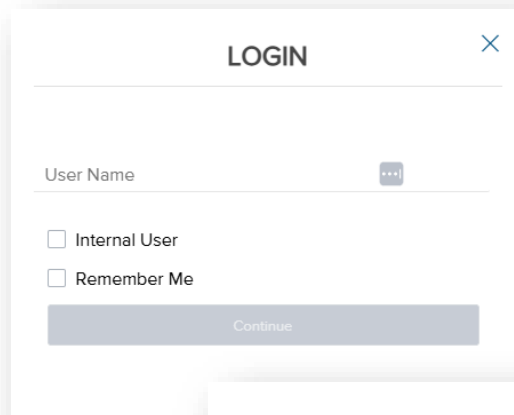
- Click on **Click here to Log In**.

PLEASE NOTE: This is a SEPARATE login from your FUEL portal login.

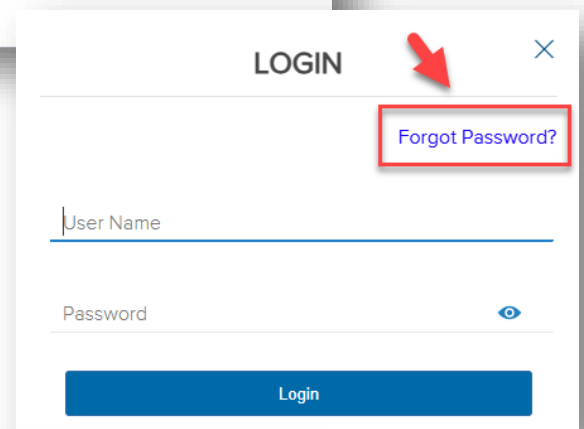


First Time Sign-on:

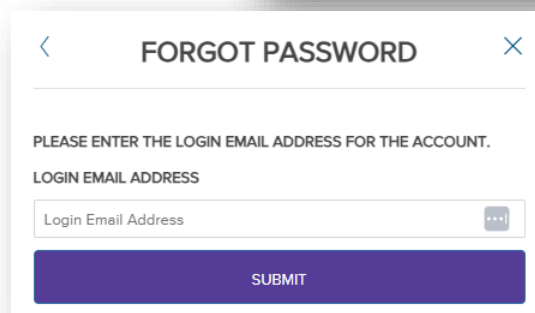
- Type in User Name (**email address**) and click **Continue**.
- Do not click any boxes.



- From next pop up, Click **Forgot Password**
NOTE: If you have already reset your password, type in user name (email address) & password and click Login. Next step is on page 4.



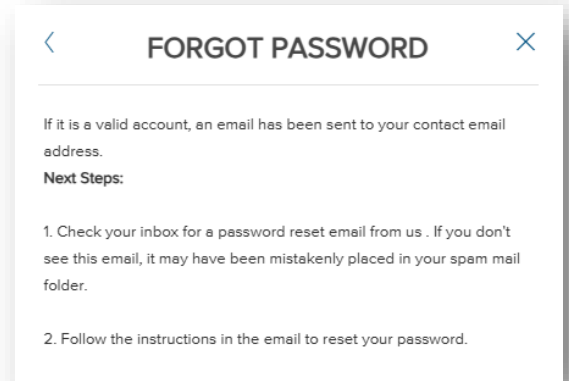
- On Forgot Password pop up, type in **Email Address** and click **Submit**.



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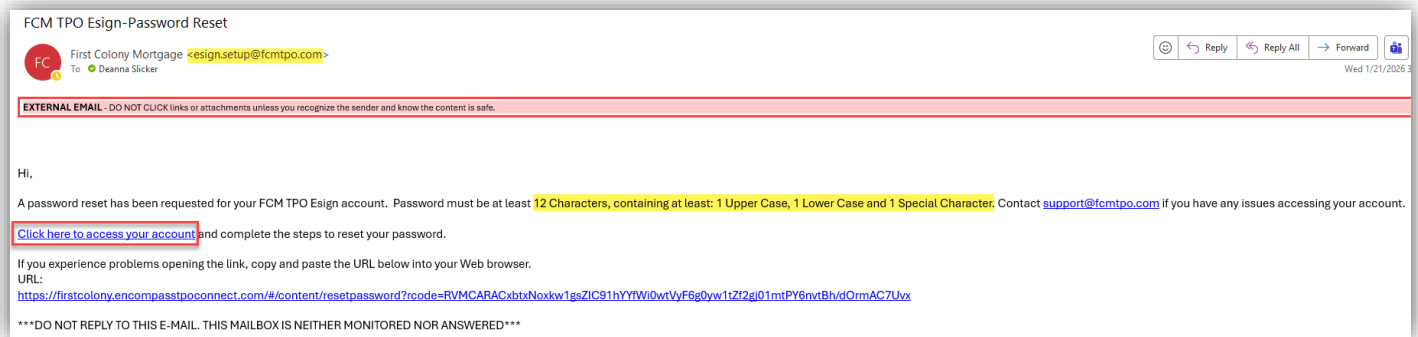
Forgot Password message pops up letting you know an email will be sent to you with password reset information if you have typed in the correct email address.



Password Reset Email

You will receive an email from esign.setup@fcmtpo.com with password reset instructions.

If you do not receive an email, contact support@firstcolony.com for assistance.



From the email, click on **Click here to access your account.**

Type in Email address, and new password twice, Then click **Reset Password.**

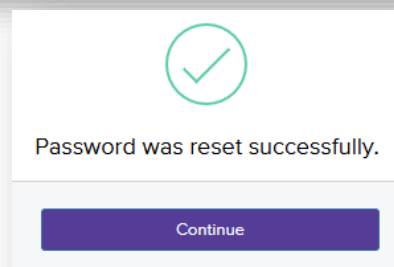
Password Requirements:

12 Characters containing at least:

1 Upper Case, 1 Lower Case, and 1 Special Character

Once your password has been reset, a pop up will appear

That the password was reset successfully.



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You will then be prompted to login.

Type in User Name (**email address**) and click **Continue**.

You are now logged in, and can continue with the e-signing Process. **Please save your ICE password.**

LOGIN

User Name

Internal User

Remember Me

Continue

To e-sign Initial Disclosures:

You will be brought to the Esign screen with loan documents to e-sign. If there are multiple borrowers to e-sign for, the number of applications will be indicated at the top left by Esign in a red circle.

1 Esign 1

2 Ken Customer
10555 Birch St, Burbank, CA, 91502
ABC Test Company

Loan #	1025179733	Loan Purpose	Purchase	Loan Amount \$	\$300,000.00	Initial Disclosures
DTI - Top	16.196%	Loan Type	Conventional	FICO	-	
LTV	88.235%	Interest Rate	6.990%	Cash to Close	\$33,387.36	

eSign

STATUS	DOCUMENT NAME	ESIGNED BY	ESIGNED DATE
Group: My eSign (42)			
	Anti-Steering Safe Harbor Disclosure	VIEW DETAILS	Review and Esign
	Your Home Loan Toolkit - Esign	VIEW DETAILS	Review and Esign

3

1. Indicates the number of applications to e-sign

2. Borrower Name of disclosure package to e-sign

3. Click anywhere on the first document to begin the e-signing process (this is the only document you will need to e-sign)

A box will pop up pertaining to **esigning the 1003**.

Click **Start eSign Session**.

eSign 1003 - URLA

Simplifile

Your Simplifile eSign Event is available

[Start eSign Session](#) [Back to Previous Page](#)

By clicking Start eSign Session, you agree to the [Privacy Policy](#) and [Terms of Service](#)



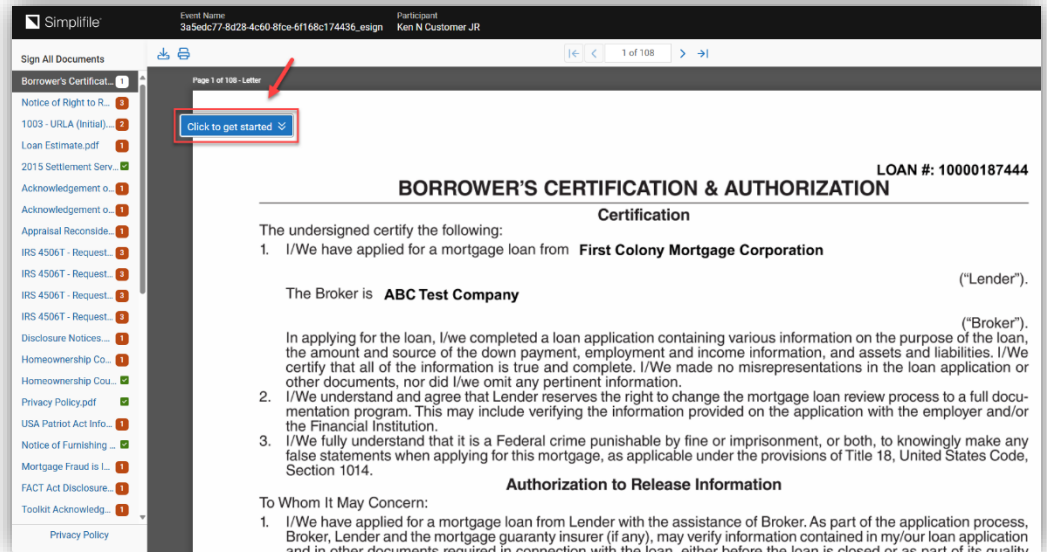
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Click **Start** button

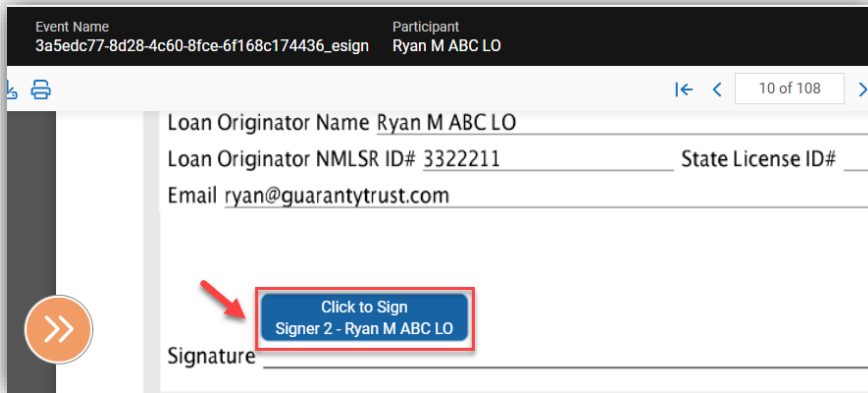
Sign All Documents

Click on **Click to get started**



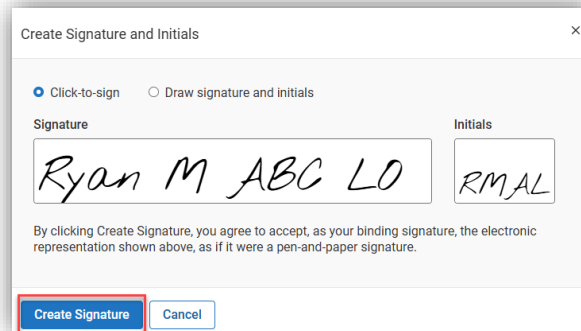
Click on **Click to Sign**

This applies the e-signature to the document location.



Create Signature and Initials

Click **Create Signature**



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The Orange arrows will indicate each location you need to sign

Event Name
3a5edc77-8d28-4c60-8fce-6f168c174436_esign

Participant
Ryan M ABC LO

Sign All Documents

Borrower's Certificati... ✓
Notice of Right to Re... ✓
1003 - URLA (Initial)... ✓
Loan Estimate.pdf ✓
2015 Settlement Serv... ✓
Acknowledgement of... ✓
Acknowledgement of... ✓
Appraisal Reconsider... ✓
IRS 4506T - Request f... ✓
IRS 4506T - Request f... ✓
IRS 4506T - Request f... ✓
IRS 4506T - Request f... ✓
Disclosure Notices.pdf ✓

By signing below, the mortgage broker certifies that complies with California Law.

ORIGINATOR: ABC TEST COMPANY

Click to Sign
Signer 2 - Ryan M ABC LO

BY: RYAN M ABC LO

LOAN ORIGINATOR
TITLE

NMLS NO: 3322211

You have completed signing of all documents.

Click the blue **Submit Signed Documents** button.

Event Name
3a5edc77-8d28-4c60-8fce-6f168c174436_esign

Participant
Ryan M ABC LO

78 of 108

You have completed signing of all documents. Click to submit documents.

Submit Signed Documents

ORIGINATOR: ABC TEST COMPANY

BY: *Ryan M ABC LO* 09/0

RYAN M ABC LO

LOAN ORIGINATOR
TITLE

NMLS NO: 3322211

Confirm Submission

Click the **Confirm Submission** button.

Submit Signed Documents

By clicking "Confirm Submission" below, you are indicating that you have reviewed the documents in their entirety.

Confirm Submission Cancel



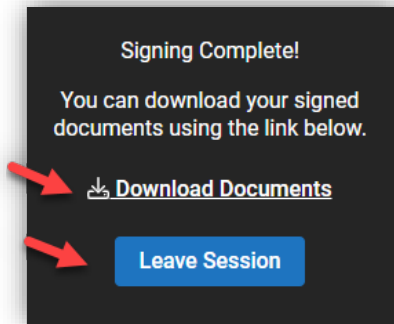
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Signing Complete

Click **Download Documents** if you'd like to download the e-signed package.

Otherwise, click **Leave Session**.



Questions regarding **logging in or the e-sign process** should be sent to support@firstcolony.com.

Questions regarding the **disclosure data** should be sent to disclosures@firstcolony.com.



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