

## 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 FCM TPO through FCM FUEL.

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

<b>Loan #</b> 545395	<b>Note Rate</b> 7.500% <span style="font-size: 0.8em;">ⓘ</span>	<b>FICO</b> 750	<b>AE</b> Ryan McCormick AE Test Act <input checked="" type="checkbox"/>
<b>Status</b> New	<b>Product</b> Conv - 30 Year Fixed	<b>Purpose</b> Purchase	<b>Support Desk</b> <input checked="" type="checkbox"/>
<b>Borrower</b> Ken DSCR	<b>LTV</b> 75.00% <span style="font-size: 0.8em;">ⓘ</span>	<b>Address</b> 122 Test Court	<b>Lock Desk</b> <input checked="" type="checkbox"/>
<b>Loan Amount</b> \$153,675		<b>Channel</b> Broker	<a href="#">OPEN CONTACT CENTER</a>

EDIT 1003

**LOAN ESTIMATE**

Requested: - | All Borrowers Signed: -

Sent: - | LO Signed: -

AUS
APPRAISAL
UPLOAD & SUBMIT
UW
CD

**Request Initial Disclosures**

SAVE PROGRESS
EXTEND LOCK
DISCLOSURE ACTIONS

SELECT LE DOC

or Drag/Drop LE Doc

### Access the Initial Disclosures Portal.

- Once initial disclosures have been requested, an email is sent to the Loan Officer on loan from an @fcmtpo.com email address titled “*Important Task for your Mortgage Disclosures*”.
- Click on **Click here to sign the documents**.

#### EasyTest User: Important Task for your Mortgage Disclosures

Taylor Paulista <taylor.paulista@fcmtpo.com>  
 To ⓘ deanna.slicker+99@fcmtpo.com

**EXTERNAL EMAIL** - DO NOT CLICK links or attachments unless you recognize the sender and know the content is safe.

**Borrower: Ken N Test JR**  
**Property Address: 10655 Birch St**  
**eDisclosure package Sent Date/Time: 2024-11-18 16:11:55**

Dear EasyTest User,

This email has been sent to notify you that your signature is required on the package sent on 2024-11-18 16:11:55. 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.

DSCR 1003 URL A  
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.encompassstoconnect.com/#/home/pipeline/4a4a0bf9-37d6-45e8-b563-fbee15b16c96/esign?packageId=ebcf59c0-7576-43bf-9f4b-bcf96a2637d5>

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

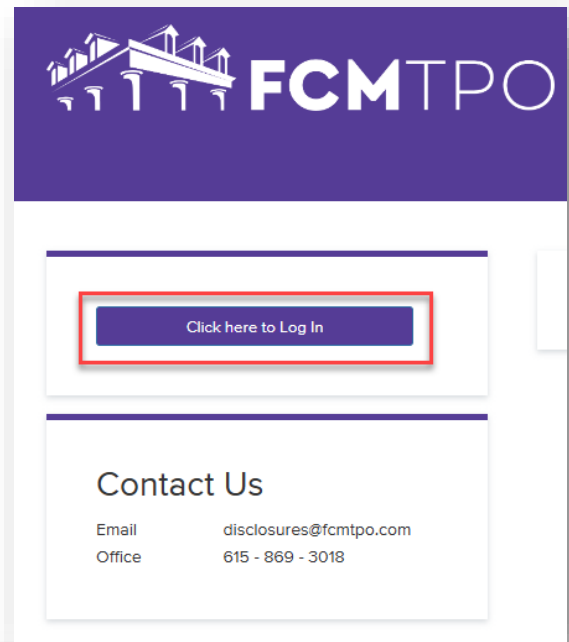
Sincerely,  
 Encompass eFolder Team  
 Ellie Mae, Inc.

## Logging In:

You will be directed to:

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

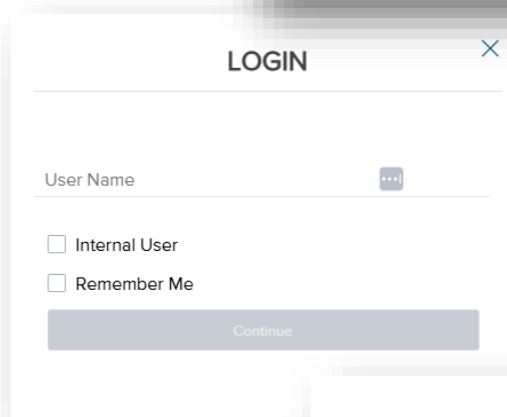
Click on **Click here to Log In**.



## First Time Sign-on:

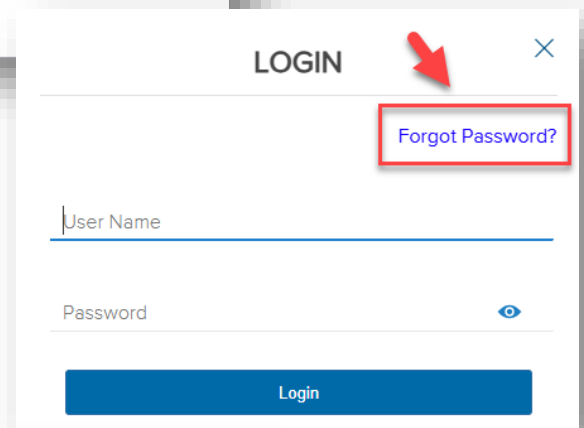
Type in User Name (**email address**) and click **Continue**.

Do not click any boxes.

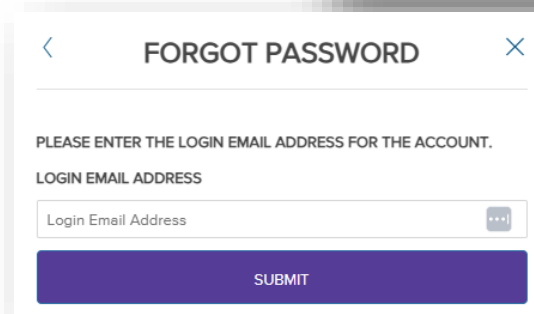


From next pop up, Click **Forgot Password**

**NOTE:** *If you have already reset your password, type in user name (email address) & password and click Login. Next step is on page 4.*



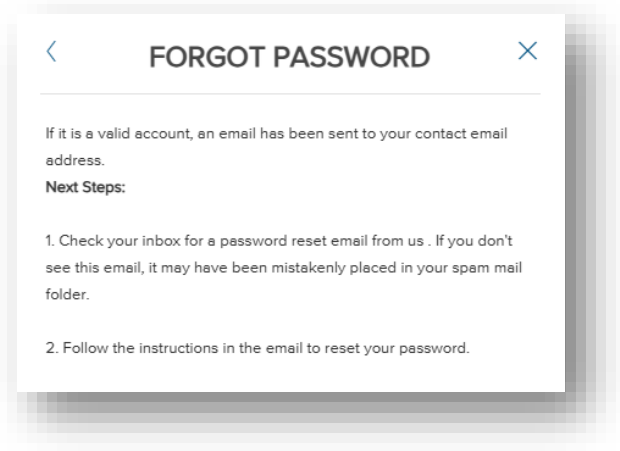
On Forgot Password pop up, type in **Email Address** and click **Submit**.



2100 W. PLEASANT GROVE BLVD.  
SUITE 100  
PLEASANT GROVE, UT 84062  
801-226-7456 | fcmtpo.com

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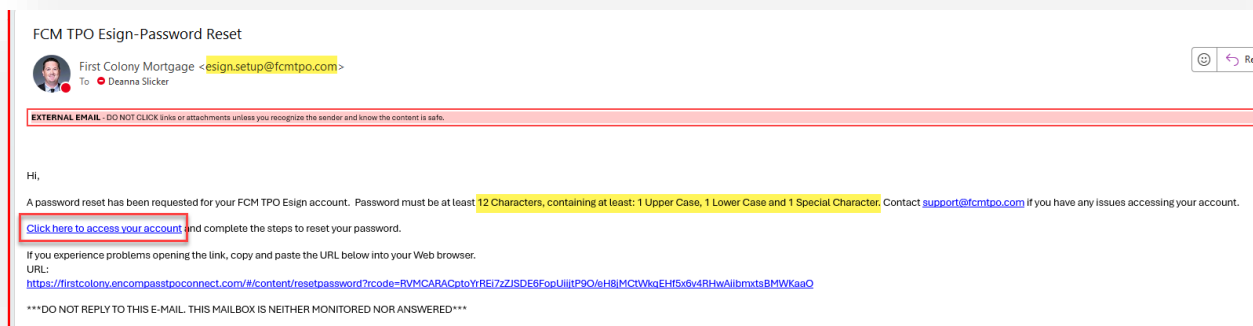
**Forgot Password message** pops up letting you know an email will be sent to you with password reset information if you have typed in the correct email address.



## Password Reset Email

You will receive an email from [esign.setup@fcmtpo.com](mailto:esign.setup@fcmtpo.com) with password reset instructions.

If you do not receive an email, contact [support@fcmtpo.com](mailto:support@fcmtpo.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.**

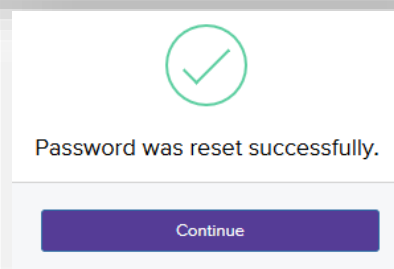
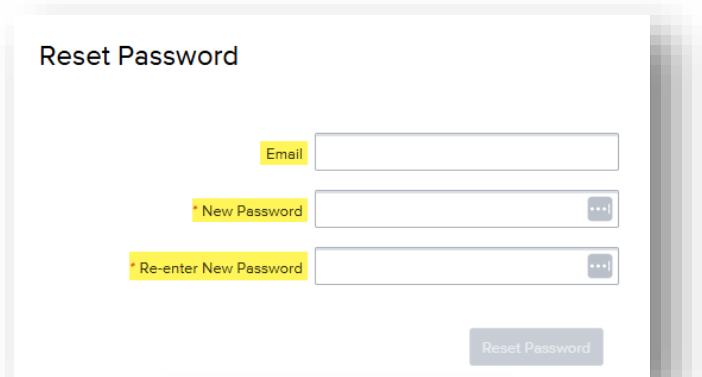
### **Password Requirements:**

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:

Click on **Esign** at top left of screen



Click on **loan**

LOAN NUMBER	BORROWER NAME	LOAN AMOUNT	PROPERTY ADDRESS
1024169094	Customer JR, Ken N	\$300,000.00	10655 Birch St Miami FL 33142

Click on Document under the 1<sup>st</sup> Group (**My eSign**):

STATUS	DOCUMENT NAME	SIGNED BY	SIGNED DATE
Group: My eSign (1)			
	DSCR 1003 URLA	VIEW DETAILS	Review and Esign
Group: Others' eSign (4)			
	TPO DSCR Disclosure Notices	VIEW DETAILS	
	TPO Borrower Cert and Auth	VIEW DETAILS	
	DSCR Fact Act	VIEW DETAILS	
	DSCR Privacy Policy	VIEW DETAILS	



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Click **Next** button

Loan #	1024169094	Loan Purpose	Purchase	Loan Amount \$	\$300,000.00
DTI - Top	24.823%	Loan Type	Conventional	FICO	-
LTV	88.235%	Interest Rate	6.875%	Cash to Close	\$50,082.58

eSign

eSign 1003 - URLA

### Loan Documents

Powered by docusign

If you are on a mobile browser, please click on Next at the bottom of the screen to view the document.

Please review and act on the documents below.

**NEXT** OTHER ACTIONS

**I.A. Personal Information**

Name (First, Middle, Last, Suffix)	Social Security Number
Ken M. Customer JR.	500-50-7000 (or Individual Taxpayer Identification Number)
Alternate Names - List any names by which you are known or any names	Date of Birth
	City/State


Click **Start** button

eSign 1003 - URLA

Please review and act on the documents below.

**FINISH** OTHER ACTIONS

**START**



Loan Number: 1025171676

**Adding Signature:**

It will take you to the signature line. Click the **Sign icon**



eSign 1003 - URLA

Select the sign field to create and add your signature.

**FINISH** OTHER ACTIONS

**Section 9: Loan Originator Information** - To be completed by your Loan Originator.

**Loan Originator Information**

Loan Originator Organization Name	Easy Home Loans, LLC
Address	3722 SW 154 Ct, Miami, FL 33185
Loan Originator Organization NMLSR ID#	2125202
State License ID#	MBR4159
Loan Originator Name	EasyTest User
Loan Originator NMLSR ID#	9999
State License ID#	1234
Email	deanna.wooten@hmc.com
Phone	615-631-7805

**Required - Sign Here**

**Sign**

Signature \_\_\_\_\_ Date (mm/dd/yyyy) 11/19/2024 11/19/2024 10:58:20 PST



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Click **Adopt and Sign** button

**Adopt Your Signature**

Confirm your name, initials, and signature.

\* Required

**Full Name\*** EasyTest User **Initials\*** EU

**SELECT STYLE** DRAW UPLOAD

**PREVIEW** Change Style

Signed by: EasyTest User Initial: EU

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts.

**ADOPT AND SIGN** CANCEL

Click **Finish** button

eSign 1003 - URLA

Done! Select Finish to send the completed document. **FINISH** OTHER ACTIONS


**Section 9: Loan Originator Information** - To be completed by your Loan Originator.

**Loan Originator Information**

Loan Originator Organization Name Easy Home Loans, LLC  
Address 3722 SW 154 Ct, Miami, FL 33185  
Loan Originator Organization NMLS ID# 2125202 State License ID# MBR4159  
Loan Originator Name EasyTest User  
Loan Originator NMLS ID# 9999 State License ID# 1234  
Email deanna.wooten@ehmc.com Phone 615-631-7805

Required - Signature Applied

Signed by: EasyTest User  
Signature Date (mm/dd/yyyy) 11/19/2024 11/19/2024 10:58:20 P.S.T.

It will bring you back to the main screen. To see the signed disclosures and E-SIGNED DATE on screen, click the **Refresh** button  at the top of your Internet Browser.

Date and Time will be reflected under **ESIGNED DATE**.

STATUS	DOCUMENT NAME	ESIGNED BY	ESIGNED DATE
Group: My eSign (1)			
	DSCR 1003 URLA	VIEW DETAILS	11/19/2024 12:02:52PM
Group: Others' eSign (4)			
	TPO DSCR Disclosure Notices	VIEW DETAILS	
	TPO Borrower Cert and Auth	VIEW DETAILS	
	DSCR Fact Act	VIEW DETAILS	
	DSCR Privacy Policy	VIEW DETAILS	



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Questions regarding **logging in or the e-sign process** should be sent to [support@fcmtpo.com](mailto:support@fcmtpo.com).

Questions regarding the **disclosure data** should be sent to [disclosures@fcmtpo.com](mailto:disclosures@fcmtpo.com).



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