

Generating and Sending Application for eSign

Please note if you do not create an e-sign package in Quantum when you create the package you cannot later turn it into an e-sign application.

- 1. Click "Documents" tab to open drop down list with available packages to create.
- 2. Click on "Application" from' the drop-down menu.

	New Loan Table Find Loan Documents Find Document	Notes
Dillon Millford 10,068,055 FL	LOAN PURPOSE PRODUCT	
Application Taken 05/11/2022	Purpose: Traditional V	
ProcessingSetup	Proposal 5/11/2020 ᢙ Application 5/11/2020	1:48 PM 2:03 PM
Borrowers	PROPERTY	
Loan Details	ZIP: 32505 FL is offeetwining Value: 450,000.00 Closing Liens/Payoffs: 100,000.00 Z	
ECM Lock	View Documents	
Context Miscellaneous	DISBURSEMENT OF PROCEEDS	
Processing - FHA - Signers / Trust	Cash Disbursement: (\$30,000 C Document Management	
Fin. Assessment Assets / Incomes	Monthly Disbursement: (\$2,500 t	
Liabilities / Expenses Schedule of Real Estate	Duration: Drag and Drop here Click here to Browse for File	
Compliance Underwriting	Line Of Credit:	
Broker Lock Settlement		
 HUD-1 Page1 Cash Flow Ledger Settlement Details 	Max Claim Amount: 450,000.00 Principal Limit: 263,700.00	

A warning pop-up will appear for anything that has not been validated

- Fees must be validated by clicking "validate now"
- You can select "**Continue**" once fees have been validated or "**Cancel**" to return to the Context tab and upload the Counseling Certificate if available at this time. (Certificate is not required to be submitted at this time but it IS required to be submitted with the Application).

arning		
🛕 Warning	Fees have not been validated	Validate now
🛕 Warning	Counseling should be completed	
	o contra a comprete	
		Cancel Continue

UPDATE (08_01_2022): This warning may or may not populate at this time. Either way, continue with the process.

Note: Once a GFE is pulled, the fee's cannot change. Pulling a new application in the same file with a new GFE does not allow an increase in fees.



3. Click "Write Cover Letter" to add a cover letter if you would like.

If you do not want to add a cover letter, you can skip to step 6.

Note: Cover letters are automatically created by Mutual of Omaha Mortgage using your contact information.

New Application Package	
+ Add Document 🧪 Write Cover Letter	
Name	Added by / Modified by / Removed by
Submission Checklist	
Loan Source Form	

4. A pop-up window will appear.

Hover slightly to the right of the "New Letter" verbiage. Click "Open" to review the Cover Letter.

Document Ter	nplate Picker	\times
Cover Letter Please select a Tem	plate	
System Templa	tes	
New Letter	Preview Open	
		Cancel



5. Click "Add to Package" to add the cover letter to the application package.

Note: You can modify the language in the cover letter if you wish.

Edit New Letter			×	Ċ.
B <i>I</i> <u>U</u> <> <u>H1</u> <u>H2</u> " ⋮ Ξ ~			Add to Package	
B Z U	+ E everse mortgage. Id will work with you th ng your reverse mortga	+ c From the exciting, but sometimes also a bit age.	Back Cancel	
Attached, please find the doc I will give you a call in the nex phone. I look forward to working with	imentation that I have t days, or you can alway you	prepared tor you. ys reach me anytime by email or on my mobile		

6. Click "eSign" to have the customer sign the Application electronically.

Note: The cover letter will show as the first document in the application package.

New Application Package					×
+ Add Document 🖍 Write Cover Letter				D	eselect a
Name	+ Added by / Modified by / Removed by	Document Type	+ Signers	Action	
New Letter		Cover Letter			
Submission Checklist		Submission Checklist	JT		
Loan Source Form		Loan Source Form			
Appraisal Fee Deposit Dislcosure		Appraisal Fee Deposit Dislcosure	DM		
Appraisal Fee Authorization Form		Appraisal Fee Disclosure	DM		
FM1009		FM1009	DM, JT		- 1
FM1009 Addendum		FM1009 Addendum	DM		
List of Counselors Providing HECM Counseling		Counseling Agencies List	DM		
Amortization Schedule		Amortization Schedule	DM		
Truth-in-Lending Application Disclosure		Truth-in-Lending Application Disclos	DM		
Settlement Service Provider List		Settlement Service Provider List	DM		
Required Providers List		Required Providers List	DM, JT		
Information Release Authorization		Information Release Authorization	DM		
Patriot Act Form		Patriot Act Identification Disclosure	DM		
Alternate Contact Form		Alternate Contact Form	DM		

A pop-up window will appear	eSign	×
Regarding using SignNow, click the " Continue" button	eSigning is brought to you by QuantumReverse together with SignNow. In order to provide the borrower with the best experience, we recommend to complete all borrower and property related fields, including purchase information if applicable. This is an additional service which we offer for free until the majority of Americans have access to a Covid vaccine. Your QuantumReverse Team	
	Cancel Continue	

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3131 Camino Del Rio North Suite 1100 San Diego, CA, 92108



7. Enter the email for the borrower(s) and loan officer if they do not auto-populate.

Then click the "Preview Document" button.

	r		
igners	N		
unction	Name	Email	
oan Officer	Jaime Taylor	Testuser999@aol.com	
lorrower	Sara Moore	saraMoore@fake.com	
/et Sign Docu	iments		Why are these documents not eSignable?
No efficience			
1 No esigning			
Loan Source Fo	orm		
	The property is a second to the second	0.4.400	
Social Security	realized release relincation ((SA-89)	
Social Security	unto	(\$A-89)	
Social Security	ints	SA-69)	
Social Security Sign Docume	ints Sorrower	SA-89)	Add External Document Help
Sign Docume C Loan Officer, B Cover Letter	ints Borrower	\$4.69)	Add External Document Help
Sign Docume Loan Officer, B Cover Letter	Ints Iorrower wecklist	\$4.69)	Add External Document Help
Sign Docume Loan Officer, B Cover Letter Submission Ch TALC	nts borower ecklat	SA-89)	Add External Document Help
Sign Docume C Loan Officer, B Cover Letter Submission Ch TALC Counseling Age Additional Court	Ints Ints Iorrower ecklist encies List encies List	SA-89)	Add External Document Help

Allow the documents to process.

Application Package - Preview		×
	i i	Order Package
To: Sara Moore 2521 N Selland Ave Fresno CA 93722-5298 From: Jaime Taylor (850) 555-7777 Toettuser090/lapel.com		Gut DuA
Dear Sara Thanks for your interest in a reverse mortgage. I am a licensed loan officer and will work with you throughout the exciting, but sometimes also a bit cumbersome process of getting your reverse mortgage. Attached, please find the documentation that I have prepared for you. I will give you a call in the next days, or you can always reach me anytime by email or on my mobile phone. I look forward to working with you For the source of the source o		
Loading documents (14 of 86)		

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8. Click the "Order Package" button.



9. Click "Send eSign invitations to Signers"



The system will process the request.



Once completed, the system will provide confirmation. Click "Close"



Note: The email will be sent through Quantum via non-reply email with your information in the body of the email.





10. You can now choose to:

- To print the Wet Sign documents that are not allowed to be signed electronically, click "**Print**" in the Wet Sign Document box.
- If you do not need to print the Wet Sign documents and you close this page, you will be shown a warning pop-up which you can then close.
- You can also click "Print" or "Save as pdf file" OR ...

Application Pa	ackage - Printed Package View		×
		Ê	Wet Sign Documents
			Print Save as .pdf file
	To: Sara Moore 2521 N Selland Ave Fresno CA 93722-5298 From: Jaime Taylor (850) 572-2379 Testuser999@aol.com		eSign Documents eSign Invitations are being sent to: Jaime Taylor Sara Moore Print Save as .pdf file Sent to Borrower: 05/23/2022
	Dear Sara Thanks for your interest in a reverse mortgage. I am a licensed loan officer and will work with you throughout the exciting, but sometimes also a bit cumbersome process of getting your reverse mortgage. Attached, please find the documentation that I have prepared for you. I will give you a call in the next days, or you can always reach me anytime by email or on my mobile phone. I look forward to working with you		1

• Close the window and return to the Dashboard



• Broker Participation Disclosure Document will be sent to the broker via email for electronic signature.



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Note:

- When documents have been signed by the borrower and sent back to Quantum, the signature verification in the tracker will only display 60% completed regardless of the actual completion progress.
- Open and view the scanned document to ensure signature is present before submitting to lender
- The missing 60% warning does not hinder the process, you can move forward with the loan

✓ Documents			
Application	Step	Progress	Actions
Broker Participation Disclosure	MissingSignatu	60 %	View Printed View Scanned
Finance Lender Disclosure	MissingSignatu	60 %	View Printed View Scanned
Impound Account Statement	MissingSignatu	60 %	View Printed View Scanned
Cooling-Off Period Disclosure	MissingSignatu	60 %	View Printed View Scanned
Reverse Mortgage Interest Disclosure	MissingSignatu	60 %	View Printed View Scanned
Domestic Partnership Disclosure	MissingSignatu	60 %	View Printed View Scanned
Face to Face Counseling Form	MissingSignatu	60 %	View Printed View Scanned

Looking at the loan card on the dashboard, the status will have changed to "Processing Setup"

Sara Moore 10,070,723 CA ProcessingSetup	2
LOAN DOCUMENTS	
Closing Date: Principal Limit: Max Claim Amount: Upb: Product: Broker:Broker for M	06/22/2022 \$217,350 \$450,000 \$81,717 HECM CMT Monthly 5% utual of Omaha
Mortgage Loan Officer:	Jaime Taylor
5/23/2022 02:00 PM Application Package C	reated

Note: "Processing Setup" will only display if the Counseling Certificate has been uploaded.