

ECLOSE FOR SETTLEMENT AGENTS

Effective 6/1/2021 LendUS will utilize the SimpleNexus eClose portal for both Traditional (all wet signed) and Hybrid (eSign and wet signed) Closing Documents.

SETTLEMENT AGENT – GETTING STARTED

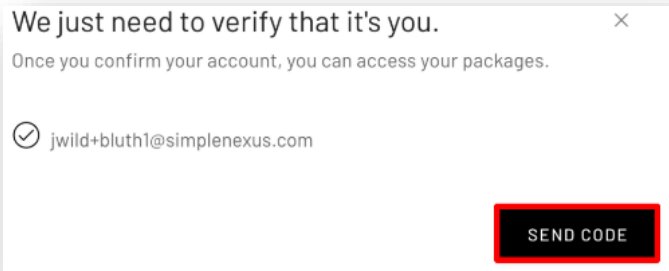
The Settlement Agent will receive an email when closing documents are available.

The email will contain a link to **Get Started**. Which will direct to the SimpleNexus Closing portal.

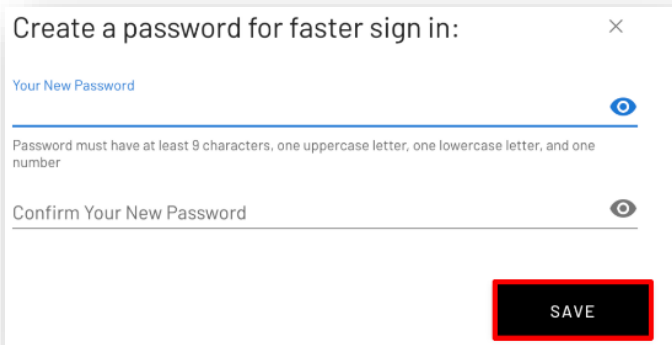
A new closing package is available for Title Case #809845 (Ken Customer). Just click below to be taken to where you need to download the package.

GET STARTED

If this is the first time using the portal, a verification prompt will display. This helps adhere to the best security practices and gives all parties more confidence that information is being shared securely.



After verifying, an account is created, and password is set. Click the "Save" button to save the changes and login.



Note: This step is only seen if a Settlement Agent does not have an account with SimpleNexus. If the email address being verified is already associated with an account, you will be taken directly to the login screen to sign into your account.

SIMPLENEXUS CLOSING PORTAL - SETTLEMENT AGENT VIEW

The **Files** page is the home page of the Closing Portal. Each file displays the primary borrower, the subject property address, the Closing Date, the type of eClosing, the most recent package status, and how many tasks or packages have been sent for the file/loan. Files can be filtered by using the search to enter borrower(s) names, file numbers, or loan numbers.

Select the desired file to view available tasks.

Hybrid Package View

New Tasks

- View Settlement Agent Only Documents**
Closing Document Package 1, Sent 10:30 AM AUG.31.2021 10 DOCS
- Download Wet Sign Documents**
Closing Document Package 1, Sent 10:30 AM AUG.31.2021 10 DOCS
- Optional: View Borrower eSign Documents**
Closing Document Package 1, Sent 10:30 AM AUG.31.2021 20 DOCS

Settlement Agent Only Documents:

Closing instructions for SA.

Download Wet Sign Documents:

Package to send to Notary.

Hybrid View:

Optional: View Borrower eSign

Documents: eSign package will be sent directly to borrower for review and available to sign on closing date.


Traditional Package View



New Tasks


- View Settlement Agent Only Documents**
Closing Document Package 1, Sent 10:55 AM MAY.06.2021 9 DOCS
- Download Wet Sign Documents**
Closing Document Package 1, Sent 10:55 AM MAY.06.2021 14 DOCS

Step 1: Review the Settlement Agent Only Documents. Click **Start** to prompt download for closing instructions which can be saved locally. Check the box to confirm that the documents have been reviewed and click the submit button.

 **View Settlement Agent Only Documents** 9 DOCS ^
Closing Document Package 2, Sent 5:24 PM APR.29.2021

View


You have new documents to view. Click on the 'Start' button to view and download the Settlement Agent Only Documents.

Settlement Agent Only Documents  **START**

I have reviewed the documents


SUBMIT


Step 2: Click **Start** to download wet sign documents and print or save to PDF to send to Notary to be signed on the closing date. Check the box to confirm that the documents have been reviewed.

 **Download Wet Sign Documents** 16 DOCS ^
Closing Document Package 2, Sent 5:24 PM APR.29.2021

Step 1: Download


The following documents need to be printed and signed. Click on the 'Start' button to view the Wet Sign Documents where you can then download and review them to make sure they are correct and accurate.

Wet Sign Documents  **START**

 **IMPORTANT NOTE** ^

I have reviewed the documents

Documents from Package

Download All 

Uniform Residential Loan Application (2020)
Updated: APR.29.2021



Privacy Policy
Updated: APR.29.2021



Homeowner Tax Authorization
Updated: APR.29.2021



Step 3: (Hybrid packages only) The SA can Review the Borrower(s) eSign Documents. Clicking the **Start** button will display the review of eSign documents. The SA will click the **Download All** button to review the document package and click submit to clear the task.


Optional: View Borrower eSign Documents

Closing Document Package 1, Sent 10:30 AM AUG.31.2021

20 DOCS

View

The following closing documents are going to be eSigned by the borrower. Click on the 'START' button to view and download the Borrower eSign Documents to make sure they are correct and accurate.

Borrower eSign Documents  **START**

IMPORTANT NOTE ▾

I have reviewed the documents

SUBMIT

Please Note: If the Closer sends the eSign documents prior to closing date, the borrower(s) will have the option to review the full closing package. If the closing date is a future date, an email notification will go to the borrower alerting them that the closing documents are ready to be viewed.

Emerson Ecloseo

New Closing Document(s) Ready to View - You have new closing documents that are ready to be viewed. When your loan is ready to close, you

On the closing date, the borrower(s) will receive an email notification that documents are ready to be eSigned. For Hybrid packages, the eSign documents should be **signed on the closing date** but prior to wet signed docs being signed with the notary.

Your Closing Documents are ready for your eSignature Inbox x Save x

Emerson Ecloseo <notifications@simplenexus.com>
to hhomeowner555+eclose69 ▾



Sample Borrower Email Notification that docs are ready to be signed.

Your closing documents are ready for your signature. Please click on the "Get Started" button to login and sign your documents.

Get Started

COMPLETED ESIGN DOCUMENTS TASK

After closing documents have been signed by the borrower(s) for Hybrid packages, the Settlement Agent will receive an email notifying them that the eSign tasks have been completed.



All required eSign tasks have been completed for Loan 110016150 (Andy America and Amy America)

Settlement Agents will see a new task in the SimpleNexus Closing Portal prompting to review and download the completed eSign documents.



New Tasks



Optional: View Completed Borrower eSign Documents
Closing Document Package 1, Sent 3:02 PM AUG.31.2021

20 DOCS

SETTLEMENT AGENT – UPLOAD DOCS TO PORTAL

Uploading Wet-Signed Documents to Closing Portal

After wet-signed documents have been signed (Hybrid or Traditional), the SA will need to scan and upload the documents into the SimpleNexus Closing portal.

Please Note: The SA will not use a Sharefile to upload the wet-signed file. The SimpleNexus Closing portal will be used for all closing packages (Hybrid and Traditional).

Upload Completed Wet Sign Documents
Closing Document Package 1, Sent 12:22 PM MAY.06.2021 9 DOCS

Step 1: Download

The following documents need to be printed and signed. Click on the 'VIEW' button to view the Wet Sign Documents where you can then download and review them to make sure they are correct and accurate.

Wet Sign Documents



VIEW

IMPORTANT NOTE

Step 2: Upload Signed Documents

Scan and upload all pages of the signed documents.

Upload or drag and drop your files here

Click **Submit** after upload is complete.

SUBMIT

PRO FORMA CD DRAFT PROCESS







For closings in a Wet or Table funding state, the Settlement Agent will initially receive a "Draft" closing package which will contain Closing Instructions, Security Instrument and any Riders and the Pro Forma CD.

The Files page status will show as "Draft Docs Received" with 3 Tasks to complete.

Hybrid eClose	PROPERTY	CLOSING DATE	STATUS	TASKS
 Ken Customer FILE # 110016271	1 Annette Way Dana Point, CA 92629	SEP.02.2021	VIEW/DOWNLOAD DRAFT DOCS	3 INCOMPLETE







The Tasks page will be shown as "Draft Closing Document Package".

New Tasks

-  **View Settlement Agent Only Documents** 10 DOCS 
[Draft Closing Document Package 2, Sent 12:30 PM SEP.02.2021](#)
-  **View Wet Sign Documents** 9 DOCS 
[Draft Closing Document Package 2, Sent 12:30 PM SEP.02.2021](#)
-  **Optional: View Borrower eSign Documents** 22 DOCS 
[Draft Closing Document Package 2, Sent 12:30 PM SEP.02.2021](#)

The Tasks will need to be processed as per instructions in Steps 1 and 2 above, to mark them as completed.

Completed Tasks

-  **View Settlement Agent Only Documents** 10 DOCS 
[Draft Closing Document Package 2, Viewed 3:12 PM SEP.02.2021](#)
-  **View Wet Sign Documents** 9 DOCS 
[Draft Closing Document Package 2, Viewed 3:13 PM SEP.02.2021](#)
-  **Optional: View Borrower eSign Documents** 22 DOCS 
[Draft Closing Document Package 2, Viewed 3:13 PM SEP.02.2021](#)

The Settlement Agent will work with the Closer to produce the final closing disclosure. The closer may send another Pro Forma CD to review and this will also be presented as a "Draft" task. Each task that comes in should be processed and completed. Once the Pro Forma CD is approved by both the Settlement Agent and Closer, the final Closing Documents will be submitted as New Tasks with the Completed Draft Tasks at the bottom.

Hybrid eClose

JH John Homeowner
FILE # 9123

PROPERTY

333 eClose Train Way
Reno, NV 89503

CLOSING DATE

MAY.31.2021

STATUS

PREPARING FOR CLOSING

TASKS

3 INCOMPLETE

New Tasks



View Settlement Agent Only Documents
Closing Document Package 1, Sent 3:02 PM AUG.31.2021

10 DOCS



Upload Completed Wet Sign Documents
Closing Document Package 1, Sent 3:02 PM AUG.31.2021

10 DOCS



Optional: View Borrower eSign Documents
Closing Document Package 1, Sent 3:02 PM AUG.31.2021

20 DOCS

Completed Tasks



View Settlement Agent Only Documents
Draft Closing Document Package 2, Viewed 3:12 PM SEP.02.2021

10 DOCS



View Wet Sign Documents
Draft Closing Document Package 2, Viewed 3:13 PM SEP.02.2021

9 DOCS



Optional: View Borrower eSign Documents
Draft Closing Document Package 2, Viewed 3:13 PM SEP.02.2021


22 DOCS













ECLOSE PACKAGE REDRAWS


Redraws are a common part of the Closing process. The Closer will notify the Settlement Agent if a redraw needs to take place. When the Closer submits the new Closing Document package, it will merge the New Tasks into any incomplete corresponding document Task. As an example, the new Wet Task will merge with an incomplete Wet Task, which means you will only see the one new incomplete Wet Task. The same will happen with the Settlement Agent Only Documents and the eSign Documents Tasks.

Since a redraw usually only affects some documents, not all, when the Task is opened the SA will notice that some documents will reflect as being from a previous package. This is normal as the redraw did not affect those documents.

Review Documents ✕

Documents from Package Download All 

USA Patriot Act Information Form <small>Updated: NOV.05.2020</small>	 
Tax Record Information Sheet <small>Updated: NOV.05.2020</small>	 
Loan Disbursement Instructions <small>Updated: NOV.05.2020</small>	 
Instructions to Escrow/Title/Closing Agent <small>Updated: NOV.05.2020</small>	 
Data Entry Proof Sheet - Fees <small>Document from a previous package: NOV.04.2020</small>	 
Data Entry Proof Sheet <small>Document from a previous package: NOV.04.2020</small>	 

 **VERIFY WITH CLOSER WHICH DOCUMENTS TO KEEP.**

DONE

Please reach out to your LendUS Closing Team for questions about a document package.