



Broker Assistance - How to Request, E-Sign and View Initial Disclosures

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

Step 1: Submit Request to Guaranty through G Connect.

- 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 Loan Tracker interface for Loan # 524858. The interface includes a header with loan details: Status New, Borrower Ken Customer, Loan Amount \$300,000, Note Rate 7.625%, Product Conv - 30 Year Fixed, Property Value \$340,000, FICO 700, Purpose Purchase, Address 10655 Birch St, DTI 18.65% / 21.98%, Lock Exp Date -, and Chanel Broker. Below the header is a progress bar with steps: LOAN ESTIMATE, AUS, UPLOAD & SUBMIT, UW, and CD. The LOAN ESTIMATE step is currently active. Below the progress bar, there are buttons for 'EDIT 1003', 'VIEW DOCS', 'Request Initial Disclosures', 'SAVE PROGRESS', 'FLOAT/LOCK', and 'DISCLOSURE ACTIONS'. The 'DISCLOSURE ACTIONS' button is highlighted with a red box. The application date is Jul 6, 2022.

Step 2: Access the IDS website.

- The Broker will receive an email from mortgage.disclosures@ghmc.com.
Note: This may go to junk/spam email folders.
- Click on the link provided in the email.

The screenshot shows an email titled "Esign Initial Disclosures for Ken N Customer JR". The email is from "Your.Loan.Docs@ghmloans.com" to "Mark Weil" and "Michelle Kelly". The email content includes a "CAUTION: External Email" warning, a link to sign initial disclosures: <https://esign.idsdoc.com/Esign.aspx?id=GHMC-C1D28CLOF>, and instructions on how to use the link. The link is highlighted with a red box. The email also includes contact information for Guaranty Home Mortgage Corporation: Electronic Disclosure Dept., GUARANTY HOME MORTGAGE CORPORATION, it@ghmloans.com, and 615-848-7700. The Guaranty HOME MORTGAGE logo is at the bottom.



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Step 3: Log in to the IDS website.

- Enter the **IDS** username and password.
Note: This username and password will be different from the G Connect credentials. For assistance with Login information please contact the Support Department at support@ghmc.com.
- Click on **Login**.

Each signer of this document package will receive a separate email containing a link to their documents. If you need to log in and you are not the person named on this screen, please see your email and follow the link sent to you. If you did not receive or have lost your email, please contact your lender representative.

Please enter your IDS username and password:

User Name

Password

LOGIN

[Forgot your Username?](#)

[Forgot your Password?](#)

Step 4: Review the Instructions Page.

- After reviewing the instructions click on **OK**.

Instructions

Document Signing Instructions

Review all pages of the document and sign by clicking on the **SIGN HERE** buttons and choosing options where indicated.

Some documents require data fields to be completed. Enter the applicable information or N/A in all data fields on the form and click Save.

Save

Documents labeled **INK SIGN** must be printed, physically signed and delivered to your loan officer (*not applicable on all packages*).

Some documents may not require a signature and will be marked signed after scrolling to the very bottom of the document and clicking the **"Acknowledge current document"** button.

Documents requiring signatures will be marked signed when the last available "Click to Sign" button has been selected for that document.

OK



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Step 5: Sign the Documents.

- Scroll down to review the document.
- Click on **Jump to next signature item** to go to signature line of document.

LOAN OFFICER - 1003 APPLICATION 1 Print Help

To be completed by the Lender:
Lender Loan No./Universal Loan Identifier 500060 / 5493005HC10Y8LUK5S4850006039 Agency Case No. _____

Uniform Residential Loan Application

Verify and complete the information on this application. If you are applying for this loan with others, each additional Borrower must provide information as directed by your Lender.

Section 1: Borrower Information. This section asks about your personal information and your income from employment and other sources, such as retirement, that you want considered to qualify for this loan.

1a. Personal Information

| | |
|---|---|
| Name <i>(First, Middle, Last, Suffix)</i> Ken N Customer JR | Social Security Number 500 - 50 - 7000 <i>(or Individual Taxpayer Identification Number)</i> |
| Alternate Names – List any names by which you are known or any names under which credit was previously received <i>(First, Middle, Last, Suffix)</i> | Date of Birth <i>(mm/dd/yyyy)</i> 07 / 04 / 1966 |
| Type of Credit <input checked="" type="radio"/> I am applying for individual credit. | Citizenship <input checked="" type="radio"/> U.S. Citizen <input type="radio"/> Permanent Resident Alien <input type="radio"/> Non-Permanent Resident Alien |
| | List Name(s) of Other Borrower(s) Applying for this Loan <i>(First, Middle, Last, Suffix) – Use a separator between names</i> |

Jump to next signature item Close

Signature Items Remaining **1**

Currently signing as: Loan Officer
Click-Sign Documents Remaining: 1 / 1
Ink Sign Documents Remaining: 0 / 0

- The signature line will be in red. Click on **SIGN HERE** to insert the electronic signature.

LOAN OFFICER - 1003 APPLICATION 1 Print Help

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

Loan Originator Information

| | |
|--|-------------------------------------|
| Loan Originator Organization Name Test Correspondent Company | |
| Address 10 Lea Ave Suite 800, Nashville, TN 37210 | |
| Loan Originator Organization NMLSR ID# 444444 | State License ID# 12345678 |
| Loan Originator Name Michelle Testcorr | |
| Loan Originator NMLSR ID# 123456 | State License ID# 123333 |
| Email michelle.keliy@ghmloans.com | Phone (615) 907 - 2666 |
| Signature SIGN HERE | Date <i>(mm/dd/yyyy)</i> 07/21/2021 |

Jump to next signature item Close

Signature Items Remaining **1**

Currently signing as: Loan Officer
Click-Sign Documents Remaining: 1 / 1
Ink Sign Documents Remaining: 0 / 0



Step 6: Complete signing the package.

- Once all documents have been signed/acknowledged the Broker will see a notification stating the document package signing has been completed.
- Click on **Print/Save Package** or **Close**.

Document Package Signing Completed

Congratulations!

All forms requiring signatures in this document package have been signed.

Remember, if there were any documents labeled **INK SIGN**, they must be printed, physically signed and delivered to your loan officer.

Thank you for choosing to sign your documents through our electronic signing service.

Print/Save Package

Close

Step 7: Upload Remainder of Loan Package.

- The remainder of the loan package will need to be uploaded into G Connect.
 - From within the loan, click on the **Upload and Submit** tab on the Loan Tracker.
 - Click on **Upload Document** or drag and drop the documents into the screen.
 - Click on **Submit to Lender**.

[EDIT 1003](#)
[VIEW DOCS](#)

LE

AUS

UPLOAD & SUBMIT
Submitted: - | Setup in Progress: - | Setup Complete: -

UW

CD

REQUEST CIC

SUBMIT TO LENDER

Upload your docs & submit for underwriting

UPLOAD DOCUMENT
or Drag/Drop Document

Required Documents

- Run AUS
- Request Loan Estimate
- Upload Submission

To complete the submission process, upload your documents and click 'Submit to Lender'.



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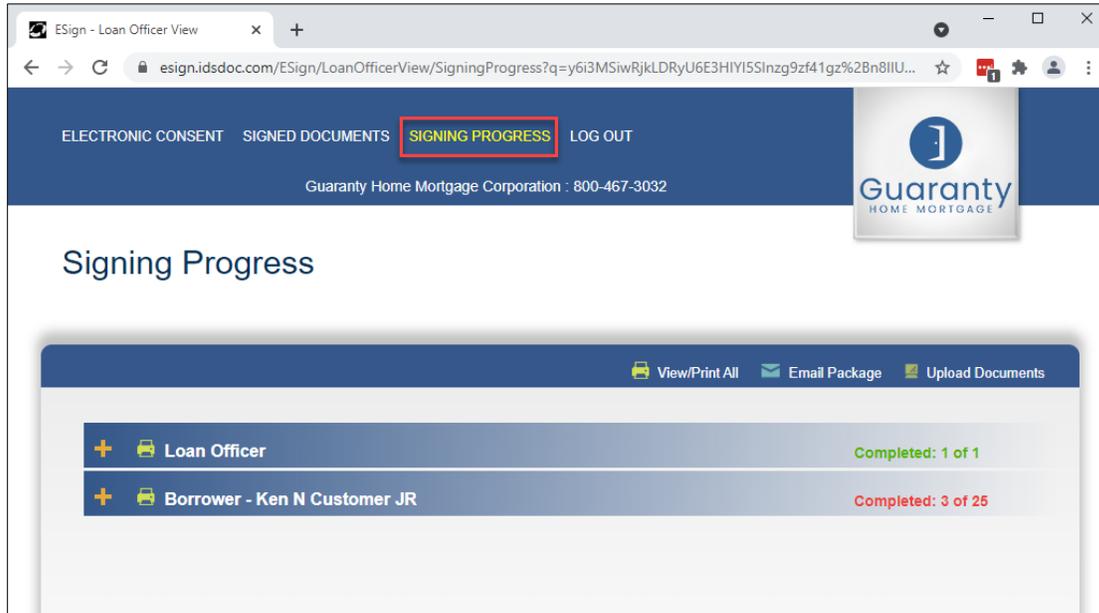
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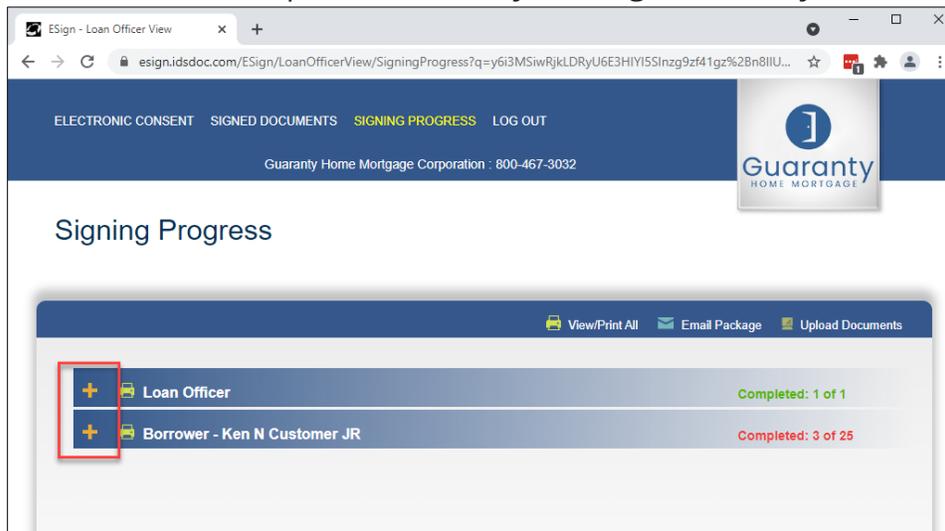
NMLS #135462 12/2022

Step 8: Viewing the Status of the Signing Process

- To view the status of the Signing Process, click on the link provided in the email that was initially received from IDS.
- After you have signed into IDS, Click on **Signing Process**.



- To view the remaining documents that need to be signed by the Loan Officer or the Borrower(s), expand the lists by clicking on the + symbol.



- The lists will show you which documents have been signed/acknowledged and which documents still need to be completed.





The screenshot shows a web browser window with the URL `esign.idsdoc.com/ESign/LoanOfficerView/SigningProgress?q=y6i3MSiwRjklDRyU6E3HIYI5Slngz9zf41gz%2Bn8IU...`. The page has a dark blue header with navigation links: ELECTRONIC CONSENT, SIGNED DOCUMENTS, **SIGNING PROGRESS**, and LOG OUT. Below the header, it says "Guaranty Home Mortgage Corporation : 800-467-3032" and features the Guaranty logo. The main heading is "Signing Progress".

Below the heading, there are three action buttons: "View/Print All", "Email Package", and "Upload Documents". The content is organized into two main sections:

- Loan Officer** (Completed: 1 of 1)

| SIGNED | DOCUMENT NAME | COMPLETED METHOD |
|-------------------------------------|--------------------|------------------|
| <input checked="" type="checkbox"/> | 1003 Application 1 | eSigned |
- Borrower - Ken N Customer JR** (Completed: 3 of 25)

| SIGNED | DOCUMENT NAME | COMPLETED METHOD |
|-------------------------------------|--|------------------|
| <input checked="" type="checkbox"/> | Guaranty Cover Letter App 1 | Acknowledged |
| <input checked="" type="checkbox"/> | Loan Estimate | eSigned |
| <input type="checkbox"/> | Loan Estimate - Service Provider List (No Estimates) | |
| <input type="checkbox"/> | 1003 Application 1 | |

Should you have any questions during this process, you can contact the Initial Docs Dept at 615-869-3000 or disclosures@ghmc.com.



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