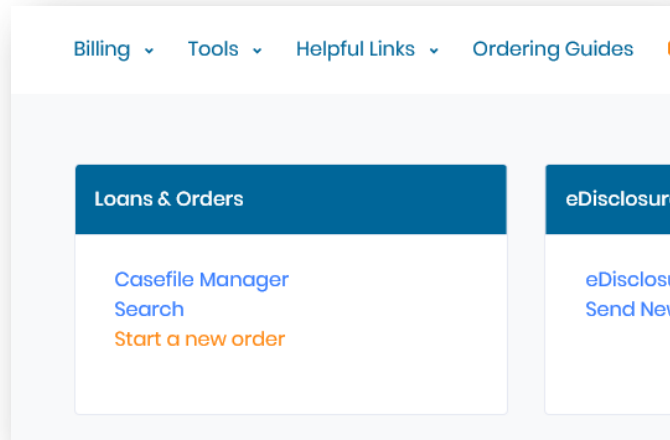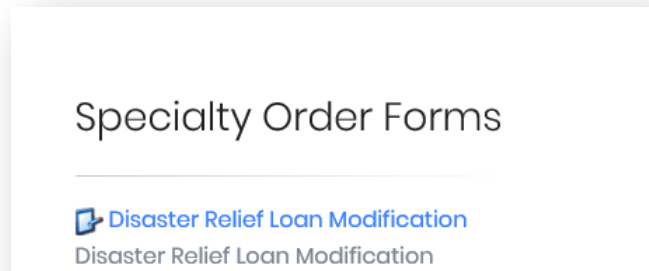**To create a new Disaster Relief Loan Modification, go to your account and click "Start a new order"**
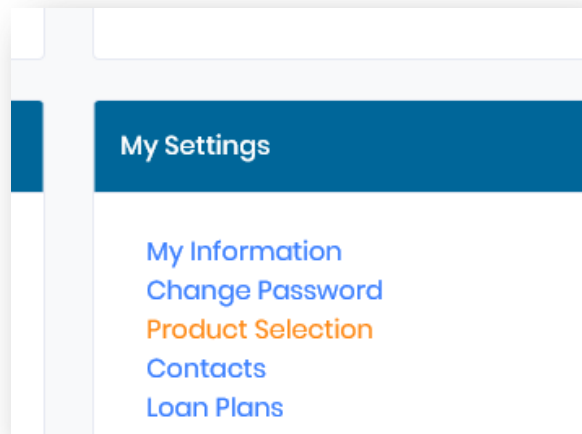
Select a state. Disaster Relief Loan Modifications are available for all states.
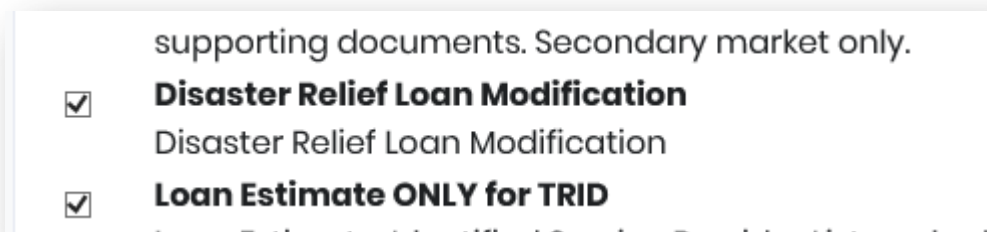
The Disaster Relief Loan Modification is available under Specialty Order Forms.
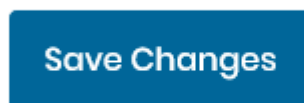
If it is not visible, you can change your account product options under My Settings on the account tab:

Scroll down and make sure the box next to Disaster Relief Loan Modification is checked.

Hit Save Changes at the bottom

Once you've selected Disaster Relief Loan Modification from the list of orders, you will be prompted to select a service. There is only one. Click the blue "Order" button to continue.

Disaster Relief Loan Modification

Disaster Relief Loan Modification

Select Service:

Express - Disaster Relief Loan Modification $75.00   Order

What is Express service?

PPDocs, Inc. will NOT inspect, review, or perform quality assurance. We will present you a list of possible documents for your transaction. You may modify the document selection as needed. You may request multiple redraws as needed. There are no redraw fees.

You will be prompted to select a Lender Setup. Select one, or a blank one, and hit "Start a new order" to continue.

Lender Setup:

Lender Setup contains data that is standard across all orders. This is designed to set defaults that are unlikely to change on the loan level. If you do not wish to use a setup file, select "* Blank Setup*".

SELECT A LENDER SETUP:

* Blank Lender Setup * ⌄

Start a new order

Click the Open Order form button to open the order form.

Inside the order form, you will start with the basic information about who is ordering the loan and invoice preferences. Attorney fee options are as follows: <u>Sent to my email monthly</u>, which bills any outstanding files to you each month; <u>Collected at closing and disbursed by settlement agent</u>, which produces an invoice in the package to send to title and will add an additional settlement agent screen for you to enter their information; and <u>paid by someone else</u>, which will then prompt you to fill out the billing party below that section.

The next screen is the Lender Information. If your information is already populated and never changes you can hide this screen on the order information screen with the "Show Lender Information" question. Saying "NO" will omit this screen from the order form.

Then, you have the property information screen

The borrower screen is next and contains the whole of the borrower information we collect. For this order form, we are only worried about the borrower's name and address, the required fields.

Disaster Relief Loan Modification

ppdocs,inc

Email Support

‹ Back	Next ›

Order Information
Lender Information
Property Information
Borrower(s)
Disaster Relief Loan Modification Det
Document Selection
Auditor
Submit Request

Borrower(s)

Borrower #1 Information

Borrower Designation: Individual

Individual Information

First Name: John
Middle Name:
Last Name: Smith
Suffix:
Alternate Name on W9:
Gender: Unknown
Email Address:
Power of Attorney: ☐
Name Affidavits:
Signing: All Documents
Mailing Address Outside USA? ⦿ No ○ Yes
Mailing Address: 123 Happy Lane
ZIP: City, State: 76017   Arlington   TX
Physical Address Street 1:
Physical Address Street 2:
ZIP: City, State:
County:
Own/Renting at Present Address? No primary housing expense
Years at Present Address: 0
Months at Present Address: 0
Joint Application: No
Applying for Joint Credit? No
Show Credit Score Information? ⦿ No ○ Yes
Show IRS Details information? ⦿ No ○ Yes

Signature Block

_____
John Smith

☐ Add 2nd Borrower
☐ Add 3rd Borrower
☐ Add 4th Borrower

The Borrowers screen

Following the borrowers screen, there is a screen for some of the finer details of the Disaster Relief Loan Modification.

There is a question concerning "Modification Language Template" that will automatically populate the Modification Language. You can select Custom and type in whatever you wish concerning what is being modified. If you select one of the other two options, it will automatically populate the box with a template that you can edit to fill in the blanks.

Modification Language Template	Payment deferral until a specific date ▾
Modification Language (customize as needed)	Note payments are deferred and recast as follows. Interest shall continue to accrue according to the terms of the Note. Periodic ___[monthly] ___payments are not required until __[date]____. On ___[date]__all accrued and unpaid interest will be added to the principal balance. The new adjusted payment of $_____ shall begin on __[date]_____ and shall continue monthly thereafter until the interest is adjusted according to the terms of the Note if this is a variable rate Note and thereafter until the maturity date indicated in the original Note when all unpaid amounts of principal and interest are due and payable.

Or

Modification Language Template	Payment deferral for a specific number of days ▾
Modification Language (customize as needed)	Borrower has requested and Lender has agreed to defer payments on the Note for a period of XXXX days. During this period, Borrower is not required to make any principal and interest payments. All unpaid principal and interest during the deferment period will be re-capitalized into the outstanding balance of the Note. Upon the continuation of repayment on XX/XX/XXXX, Borrower's re-capitalized principal and interest payments will be $XXXX.XX due monthly on the XXth day of each month beginning on XXXXX XX, XXXX. If the Note contains a variable rate feature, payment may adjust according to the terms of the Note.

Anything you edit will save with the loan. If you change your option, it will wipe out the textbox.

The Document Selection Screen will populate two documents, the Forbearance Letter and the Simple Multistate Modification. If you've selected that the invoice be sent to and collected by the title agent, then there will also be an attorney invoice.

If there are any audit problems, they will appear on the audit screen. Otherwise, you will get a checkbox with "no errors found"

The final step to get documents is to submit the express order on the last screen.

At any time after you submit, you can go to the package from the order status page to send the document via eSign. (If you don't see the package you are looking for, try clicking the plus sign. Packages with the same name are grouped together.) Click on the package name that you want to send.

Packages						
PACKAGE	RENAME ALL	SIZE	DELIVERIES	PAGES	DATE	STATUS
⊞ Closing Documents	Rename	23 KB	0	4	3/18/2020 8:29:50 PM	

On the next page, you can download or send your disclosures via DocuSign.

Package Information   Download Package

BORROWER:	John Smith
PROPERTY:	123 Happy Lane, TX
LENDER/SELLER:	ABC Mortgage
LOAN NUMBER:	555555
CREATED:	3/18/2020 8:29:50 PM

Deliveries   New delivery. Send this package to...

TRACKING #	DESTINATION	SUBMITTED	DELIVERED	VIEWED
		No deliveries.		

e-Disclosure Requests   (e-Disclosure Manager)(New e-Disclosure Request)

LOAN #	SIGNERS	SUBMITTED	MODIFIED	STATUS
		No eSign requests.		

Click on the link for "New e-Disclosure Request" in the third panel.

The next screen will automatically populate with the sender information and the borrowers. It will also attempt to pull the signer for the Lender Party. This comes from the signature line builder from the order form's "Lender Information screen". It is not perfect, so if you need to edit something, please do so here.

Send Documents via DocuSign® to...

Incurrs a Service Fee of: **Free** *(Fee for the delivery of disclosures cannot be passed onto the borrower)

LOAN #:

555555

SENDER'S EMAIL:

Lender@ABCMort.bank

SENDER'S NAME:

Samantha Sender

SUBJECT:

Peirson & Patterson has disclosures ready for your signature!

SIGNERS:

	Name	Email*	Optional Password	Must Sign
1.	John Smith	john.smith@SaveMyHouse.Net		☑
2.	Lender Signer	john@ABCMort.bank		☑
3.				☐
4				☐

When you are finished, click "Continue to DocuSign" at the bottom of the screen.

When you get to DocuSign, it will give you an opportunity to place additional signatures and to double check the placement of the ones we put in automatically.
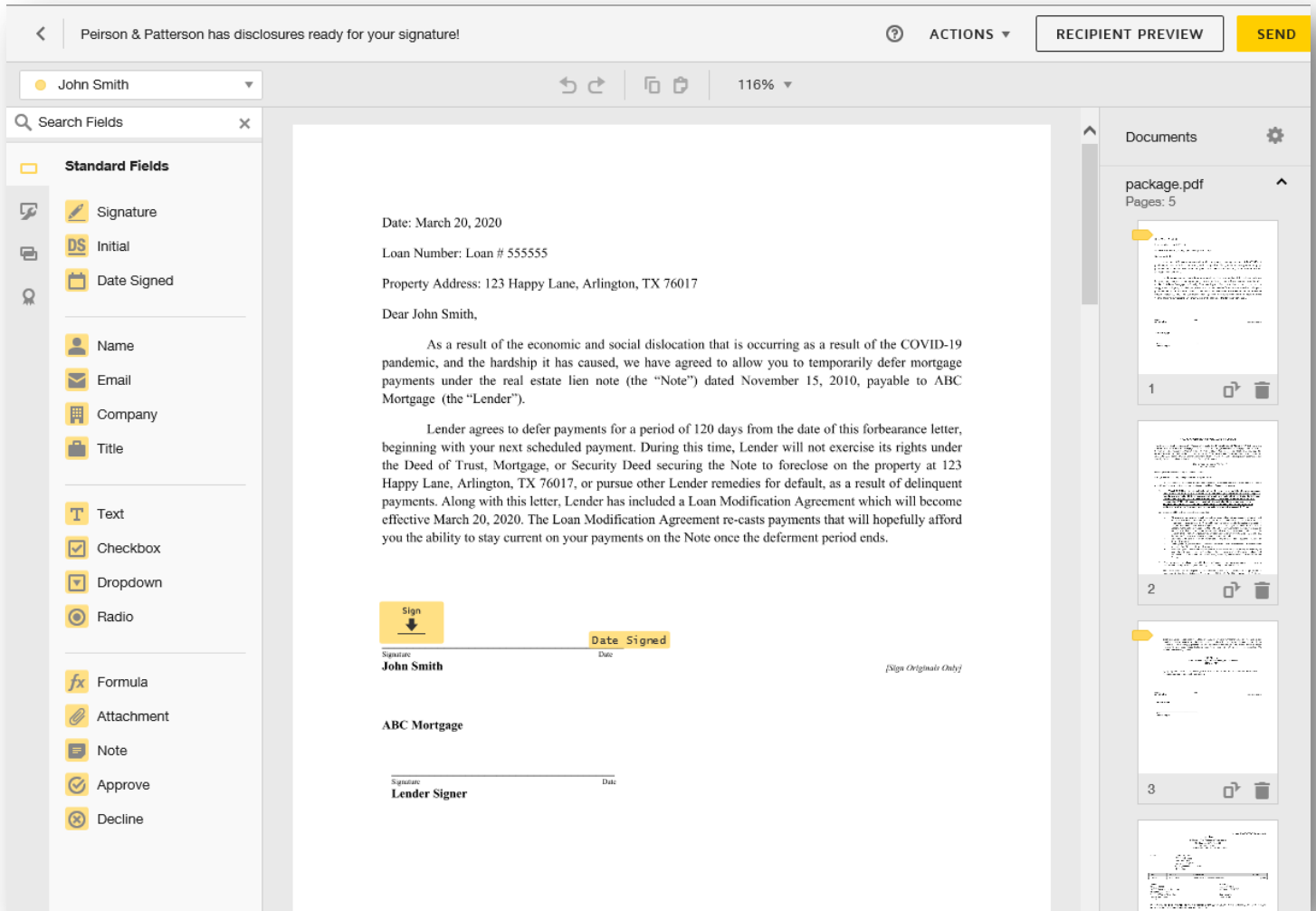
When you are finished with the borrower, you will need to manually place the signing line for the lender party. You can do this by switching to a different signer in the top left corner. In this example, I would click on "Lender Signer"
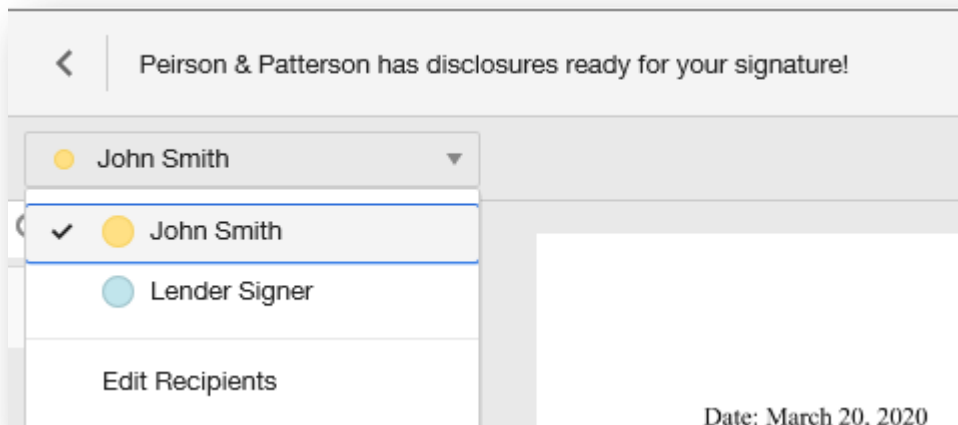
Once you have changed to your lender signature, the tabs should change color. Simply click and drag the signature line and date signed fields to the places where the Lender needs to sign.

Once all of the applicable signature lines have been placed, click the yellow "Send" button in the bottom right corner.