

doc*U***mods**TM

User Manual for Attorneys

(March 2014)

Register to Use docUmods™

(If you have already registered to use documods™, go to “Login to documods™”)

- Go to www.documods.com
- Click **Get Started** (See Figure 1-1)
- Under the *New to docUmods?* section, click **Register** (See Figure 1-2)
- Complete the User Registration form and click **Register** (See Figure 1-3)
 - Attorneys must answer “Yes” to the “Are you a borrower representative - i.e., attorney, counselor, etc.?”. Answering “Yes” will permit you to submit multiple borrowers from your account without having to re-register.
- Once your account information has been submitted, you will receive an email containing your unique Verification Code. Follow the instructions in the email to complete your verification.
- Once your account is verified, you will be able to use docUmods™

The screenshot shows the top of the docUmods website. The logo 'docUmods' is in the top left, with 'LOGIN | REGISTER' in the top right. Below the logo are 'Home' and 'More Info' buttons. A green horizontal line separates the header from the main content. The main content features a video player on the left with the docUmods logo and a play button. Below the video player is a green button with the text 'www.docUmods.com'. To the right of the video player are three quotes from clients. Below the quotes is a green 'Get Started' button with a red arrow pointing to it from the right.

docUmods™

LOGIN | REGISTER

Home More Info

COMPLETE AND ACCURATE LOAN MOD PACKAGES

www.docUmods.com

1:23

Get Started

“The single most important thing a borrower looking for a loan mod can do is get us a complete financial package.” ...
Quote from executive at one of the nation’s largest loan servicers

“Unfortunately, 95% of financial packages we receive are incomplete so we can’t finalize the review.” ...
Quote from Relationship Manager

“I just wanted you to know that docUmods was very helpful, and made the entire process seem less overwhelming. The time savings is amazing!” ...
Lorie W.

Figure 1-1
Click **Get Started** To Launch Registration

ACCOUNT LOGIN

Sign In

Existing Users Sign In Below.

Username or E-mail:

Password:

[Reset Password](#)

Remember Login

New to docUmods?

To use docUmods, please create an account.





Figure 1-2
Click **Register** To Begin Registration

USER REGISTRATION

*Note: Access to this site is Verified. Once your account information has been submitted, you will receive an email containing your unique Verification Code. The Verification Code will be required the first time you attempt to sign in to this site. All fields marked with a red arrow are required. - (Note: - Registration may take several seconds. Once you click the Register button please wait until the system responds.)

Are you a borrower representative - i.e., attorney, counselor, etc.? *

 **Attorneys must select "Yes"**

User Name: *

First Name: *

Last Name: *


Email Address: *

Password: * Passwords must be at least 6 characters in length.

Confirm Password: *

Password Question: *

Password Answer: *



Provide all of the required information and click REGISTER below to complete your registration.

Figure 1-3
Complete Required Registration Information

Login to docUmods™

- Go to www.documods.com
- Click **Get Started** (See Figure 1-1)
- Under the *Sign In* section, enter the registered email address/username you created and password. Click **Login** (See Figure 2-1)
- You will be logged in to your docUmods™ account (See Figure 2-2)

docUmods™

LOGIN | REGISTER

Home More Info

YOU ARE HERE: Login

ACCOUNT LOGIN

Sign In

Existing Users Sign In Below.

Username or E-mail:

Password:

[Reset Password](#)

Remember Login

Enter the username or email address with which you registered.

New to docUmods?

To use docUmods, please create an account.

Figure 2-1
Sign In Screen

docUmods™

LOGOUT |

Home My Profile My Clients More Info

YOU ARE HERE: My Clients

MY CLIENTS

	ID	UserID	FirstName	LastName	Status		
			23	58	Liam Edit	Kendall Edit	Completed - Docs Available for Download
			55	95	Linda Edit	Davis Edit	Completed - Docs Available for Download
			10	43	Matt Edit	Berk Edit	Completed - Docs Available for Download
			5621	5950	Matt Edit	Berk2 Edit	Payment Required
			6161	6515	Matt Edit	Plummer Edit	Missing Information
			30	67	Matt Edit	Przkop Edit	Completed - Docs Available for Download
			3865	4126	Michael Edit	Myers Edit	Missing Information
			10728	11150	Mike Edit	Rhodes Edit	Completed - Docs Available for Download
			37	75	Noah Edit	Scurdato Edit	Completed - Docs Available for Download
			1130	1213	Paul Edit	Aarons Edit	Missing Information
			13	48	Ryan Edit	Donahue Edit	Completed - Docs Available for Download

1 2




Add New Client

Figure 2-2
User Logged In Screen

docUmods™ Submissions

After you have logged in to your docUmods™ account, you will see list of all prior submissions you have made. You will also be able to start a new submission. (See Figure 2-2)

Existing Submissions: Upon login, you will see all of the borrowers you have previously started and the current status of their application.

- Click  to go back to any borrower account (you will be able to edit and/or complete any information for that borrower). You will also be able to access their documentation (assuming you have completed their application).
- Click  to edit the borrower name
- Click  to delete the borrower

New Submissions: To start a new application:

- Click **Add New Client** (See Figure 3-1)
- Enter the borrower's first and last name and click **Add New Client** (See Figure 3-2)
- The docUmods™ application process will be launched. Follow the step-by-step instructions to complete the application (See Figure 3-3)
 - A few tips:
 - You can navigate to any page by clicking the main menu tab and then selecting the page you wish to access
 - Refer to the “Tips” on each page for guidance on how to complete the required information
 - You will **not** be able to access the completed documentation on docUmods™ unless and until **all** questions have been answered
- Once you have provided all of the required information and paid for the docUmods™ application, you will be able to access, review and download all of your documents (See Figure 3-4)
 - A few tips:
 - Click the **Download** link to download the document you wish to access
 - Pay careful attention to the “Instructions / Comments” section which will detail for you what you need to do with the completed document

MY CLIENTS

	ID	UserID	FirstName	LastName	Status
	23	58	Liam Edit	Kendall Edit	Completed - Docs Available for Download
	55	95	Linda Edit	Davis Edit	Completed - Docs Available for Download
	10	43	Matt Edit	Berk Edit	Completed - Docs Available for Download
	5621	5950	Matt Edit	Berk2 Edit	Payment Required
	6161	6515	Matt Edit	Plummer Edit	Missing Information
	30	67	Matt Edit	Przkop Edit	Completed - Docs Available for Download
	3865	4126	Michael Edit	Myers Edit	Missing Information
	10728	11150	Mike Edit	Rhodes Edit	Completed - Docs Available for Download
	37	75	Noah Edit	Scurdato Edit	Completed - Docs Available for Download
	1130	1213	Paul Edit	Aarons Edit	Missing information
	13	48	Ryan Edit	Donahue Edit	Completed - Docs Available for Download

[Add New Client](#)

Figure 3-1
User Logged In. Click "Add New Client" To Start New Borrower

MY CLIENTS

Enter Borrower's Name or [Click Here](#) to Copy Existing Profile

First Name:

Last Name:

Enter borrower's first and last name and click ADD NEW CLIENT to start.

Figure 3-2
Enter First and Last Name of New Borrower

Home My Profile My Clients More Info

Client: Tom Jones Client Documents

YOU ARE HERE: My Information Household Info Borrower

Instructions

Household Info

Borrower

Co-Borrower

Household Size

Counselor

Bankruptcy

Government Info

Principal Residence

Other Properties

Assistance

Household Income

Household Assets

Household Expenses

Tax Info

Hardship Info

HAMP Info

Review

BORROWER

Complete the Borrower Information below

Name:

Social Security Number:

Date of Birth: (MMDDYYYY)


Home Phone Number:

Cell or Work Phone Number:

Email Address:

Is Borrower a Servicemember? Yes No

Is Borrower the surviving spouse of a deceased service member who was on active duty at the time of death? Yes No



TIPS

Enter the borrower information **exactly** as it appears on the mortgage statement.

For "Name", enter the Borrower's **full name** - i.e., John Doe.

Click on any Tab/Sub-Tab to navigate directly to that page.

Refer to the "Tips" on every screen for guidance on how to correctly complete the information requested.

Figure 3-3
Borrower Application Screen (Borrower Info)

CLIENT DOCUMENTS

Congratulations on completing DocuMods. Below are your customized documents together with instructions for completing each document. **Please review the documents for accuracy and follow the instructions carefully to finalize the documentation.**

Document	Instructions / Comments
HAMP RMA	Borrower and Co-Borrower (if any) must sign and date the form on page 6 and enter their respective SSNs and Dates of Birth.
<input type="button" value="Download"/>	* If you are requesting mortgage assistance for a rental property, Borrower and Co-Borrower (if any) must also initial page 4.
Uniform Borrower Assistance Form	Borrower and Co-Borrower (if any) must sign and date the form on page 4
<input type="button" value="Download"/>	
UBAF Government Monitoring Data	Include this form with your submission (it does not have to signed or dated)
<input type="button" value="Download"/>	
IRS Form 4506-T	Borrower must sign and date the form
<input type="button" value="Download"/>	* If your servicer's name was not listed in the drop down menu, you will have to contact them for the information needed to complete Line 5 of the form.
Dodd-Frank Certification	Borrower and Co-Borrower (if any) must sign and date the form
<input type="button" value="Download"/>	
Financial Statement	Borrower and Co-Borrower (if any) must sign and date the form on page 3
<input type="button" value="Download"/>	
Hardship Letter	Borrower and Co-Borrower (if any) must sign and date the form
<input type="button" value="Download"/>	
Proof of Income Checklist	Review all of the supporting documentation you MUST provide for the servicer to verify the income you have claimed. It is absolutely critical for you to document all income. Failure to document any income will result in your account being delayed or rejected.
<input type="button" value="Download"/>	

TIPS

REVIEW YOUR DOCUMENTATION CAREFULLY.

If you need to make a change to any of the forms, you may do so directly on the form or by editing the information. (To access the information screens, click "My Information" or "Client Information")

Figure 3-4
Borrower Documents Screen