



HUDHomestore E-Signature Workflow for Brokers and Agents

After the Asset Manager accepts a bid

- Bidding Broker/Agent gets an email notifying them that their bid has been accepted with the subject line of “SELLING BROKER/AGENT BID ACCEPTANCE NOTIFICATION”.
- Clicking the Accepted Bids menu item (after logging in) displays one line of information about the bid and a Checklist link on the right.
- The E-Signature checklist allows verification or updating of Purchaser(s), Signing Broker, and Closing Agent, and uploading of the following documentation: Closing agent’s state license and insurance coverage (if required), Earnest Money check, Proof of Funds, Prequalification Letter, Articles of Incorporation (for investors), and Broker Designated Signer Letter of Authorization.

E-Signature Steps after the Asset Manager verifies the checklist and initiates the Sales Package

1. Bidding Broker/Agent gets an email with a DocuSign link to review the contract and clicks **Finish** to move to the next step (or clicks the “Click to Reject the Sales Package” button to cancel the E-Signature process).
2. Broker responsible for signing the contract gets an email with a link to sign the contract and clicks **Finish** to go to the next step.
3. Each Purchaser gets an email with a link to sign the contract and click **Finish** to go to the next step. Primary buyer signs at bottom of sales contract; additional buyers initial at the bottom of the following page.
4. Closing Agent gets an email with a link to sign the contract and clicks **Finish** to go to the next step.
5. Asset Manager gets an email with a link to sign the contract and clicks **Finish** to go to the next step.

At this point the E-Signature process is complete.

Note on entering Closing Agents

When you start to type the Closing Agent name, a list of the HUDHomestore’s existing Closing Agents displays. Try to find the one you will use from the drop-down list instead of entering a new one.

If you’re not sure which to use, pick one you’re familiar with (you can always change your selection later).

If you enter a new Closing Agent, there will be an extra step in the E-Signature process that may slow things down. The Asset Manager will need to check whether the entered Closing Agent matches one already in the system. If they can’t find a match, the Asset Manager will need to enter the new one into the system.

Tip on finding a match to an existing Closing Agent

If the Closing Agent is in HUDHomestore as “The Most Excellent Closing Agent Company”, entering the word “Excellent” won’t necessarily find them. Entering “The Most” increases your odds of finding a match if they are already in HUDHomestore.