

Borrower Workflow to Complete the E-sign

1. Borrowers will receive an email to complete the E-sign process as below.

RE: 3417 South Plaza Drive Santa Ana, CA 92704

Hi test,

This is a system generated email to notify you that your initial loan disclosures have been prepared and are now ready for you to review, sign, and return back to us. One set of documents will allow for electronic signature, but another set will require you to print them and physically sign them. Again, some documents will require a wet/live signature, **so please** don't forget to print and sign them! Finally, if this is the first time you are accessing our secure site, click on "Create Account" (This is typically required for co-borrowers). To access these documents, please **CLICK HERE**.

2. Click on the hyperlink and it will redirect you to the Authentication page.
3. Click on either Text/Call to receive the Authentication code to your phone number.

Access Your Account

In order to access your account, you'll need to enter an authentication code. How would you like it sent?

Contact me at

*****6868

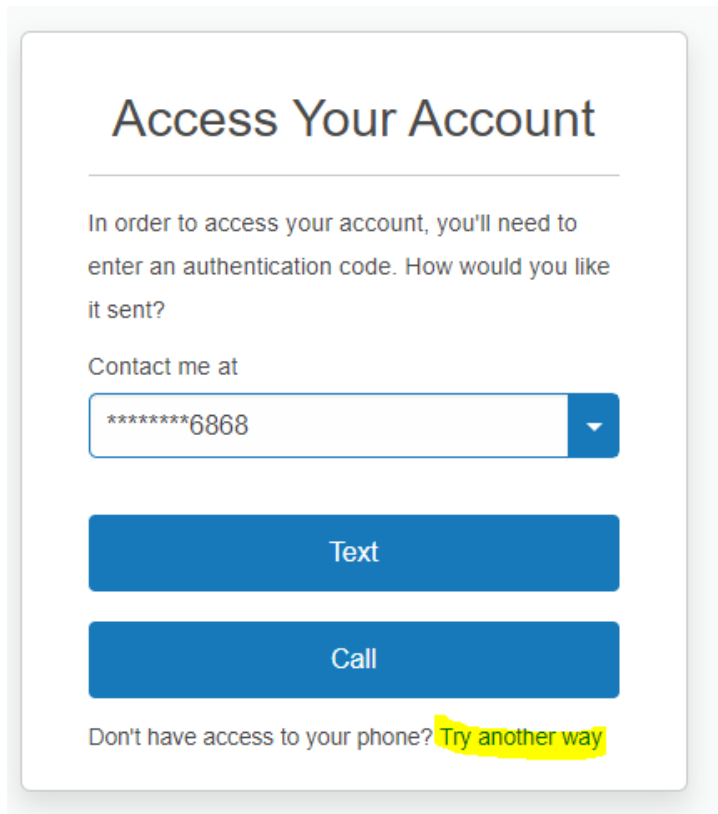
Text

Call

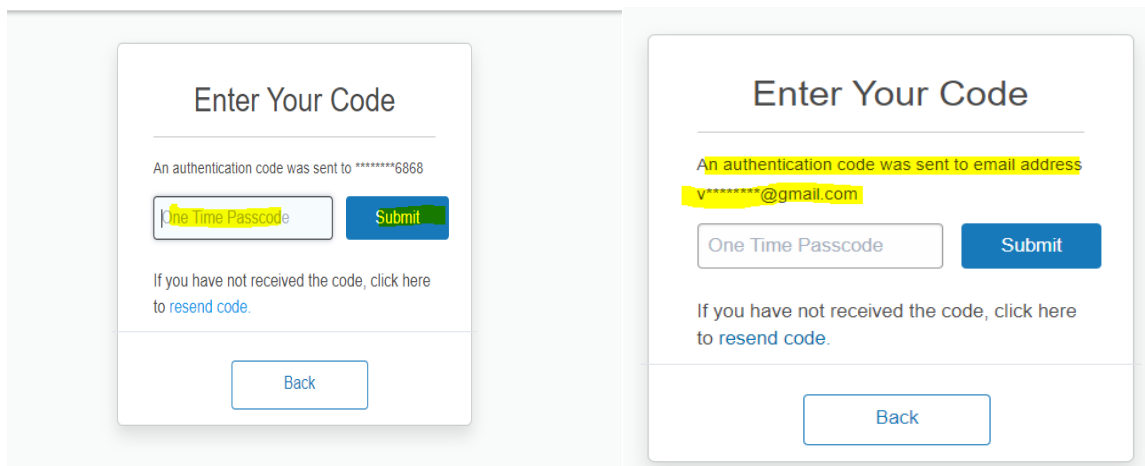
Don't have access to your phone? [Try another way](#)

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4. You can select 'Try another way' to receive the Authentication code to your Email address in file.

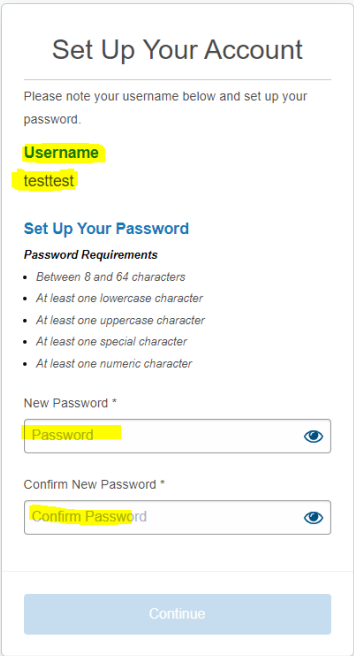
A screenshot of the "Access Your Account" screen. The title "Access Your Account" is at the top. Below it, the text says "In order to access your account, you'll need to enter an authentication code. How would you like it sent?". Underneath, it says "Contact me at" followed by a dropdown menu showing "*****6868". Below the dropdown are two blue buttons: "Text" and "Call". At the bottom, it says "Don't have access to your phone? Try another way" with "Try another way" highlighted in yellow.

5. Once you select the option to receive authentication code, you will see below screens to enter the code.

Two screenshots of the "Enter Your Code" screen. The left screenshot shows the text "An authentication code was sent to *****6868" and a text input field labeled "One Time Passcode" with a "Submit" button. Below it, it says "If you have not received the code, click here to [resend code](#)." and a "Back" button. The right screenshot shows the text "An authentication code was sent to email address v*****@gmail.com" and a text input field labeled "One Time Passcode" with a "Submit" button. Below it, it says "If you have not received the code, click here to [resend code](#)." and a "Back" button.

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- You will now see the below screen to set up the password. The username will prepopulate, and you should note the username, and it cannot be changed.



Set Up Your Account

Please note your username below and set up your password.


Username
testtest

Set Up Your Password


Password Requirements

- Between 8 and 64 characters
- At least one lowercase character
- At least one uppercase character
- At least one special character
- At least one numeric character

New Password *

Password 

Confirm New Password *

Confirm Password 

Continue

Note: The username will be combination of both first and last name.