

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.

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**

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

Enter Your Code

An authentication code was sent to *****6868

One Time Passcode Submit

If you have not received the code, click here to [resend code](#).

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Enter Your Code

An authentication code was sent to email address v*****@gmail.com

One Time Passcode Submit

If you have not received the code, click here to [resend code](#).

Back

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6. 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.