

ApplyOnline Supporting Documents service – eSign (ADV)

Broker User Guide

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Introduction

This user guide introduces 'eSign', the electronic signing functionality within ApplyOnline.

- Overview of eSign
- Using eSign;
 - Step by step broker
 - Recipient eSign process (high level)

Overview of eSign

eSign allows signatures to be captured electronically and is available using the lender's preferred service provider (eg. Docusign, eSignLive, AdobeSign and more), in this case Docusign. The process is managed using the ApplyOnline Supporting Docs service for documents that are eSign-enabled by the lender, thereby giving the ability to send, track and receive electronically signed print forms.

What are the benefits?

- Saves time
- Seamless signing process
- Manage and control the entire process within ApplyOnline
- Ability to sign documents using mobile or other tablet devices
- Secure access by way of two factor authentication (subject to service provider)
- Easily obtain signatures from applicants in remote areas
- Paperless approach to signing documents (eco-friendly)
- Automatically attaches and self-verifies the signed document to the relevant condition
- Secure transmission of documentation

Sending a document for signing overview

Sending documents for signing in ApplyOnline is an easy 3 step process;

- 1. Complete eSign request via the Documents tab
- 2. Applicant receives email and electronically signs
- 3. Once all signatories have signed, the completed documents automatically attach and self-verify themselves to relevant condition



Glossary

eSign Available

Documents that allow electronic signatures are clearly marked on the ApplyOnline application print menu as well as against the relevant condition in the document checklist.

Start eSign Request

A quick and simple step-by-step process to send documents requiring signatures electronically. The action link is available on the 'Documents' tab.

Cancel eSign Request

Action to cancel an eSign request in progress. NOTE: An eSign request cannot be cancelled once it has been completed.

Recipients

All loan parties within an application may become an eSign recipient if a signature is required from that loan party, e.g., applicant, guarantors, beneficial owners, etc.

eSign Pending

This indicates one or more recipients have not electronically signed a document.

Using eSign

What documents can be electronically signed?

To identify the documents available for eSign perform the following steps:

a) Select the Supporting Docs tab in ApplyOnline. A pen icon located in the top right hand corner of a checklist condition card indicates eSign is available



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b) Click 'Print' along the top menu bar. Print forms marked with a pencil icon are eSign enabled



Step-by-step - broker

To send document/s to the applicant to sign perform the following steps:

1. Click the 'eSign Request' link on the checklist within the 'Supporting Docs tab.

695.4U	We be weekend a set to be	Snapshot: Art Lit St OWH	occ Miro D
	To start drop your docume	nts here - or - Select file(s) ~	Acceptable Hen 1
Submission checklist Documents required at submission time.			B blaiseite / dimension
Broker Interview Guide (1 Applica 1 400642539-ADV	Home Loan Application Form (1 A., , et al. 400642699-ADV	Customer Identity Check I Amanda Advantadge	Clearting of the c
Broker Interview Guide	Advantedge Horse Loan Sh	Primary Photographic Iden Processory attached	Populo I the deconverts stacked
 Signed, dated and completed in full by broker and applicant(s) 	= Sigmed, dated and completed in full by all applicant(i) and broker	Shown primary shotographic identification of the applicate Shown clear identification details #00 Primary Photographic iden I choosens tasked	Shows most recent payalip Dated within YMENTY ONE (21) days of application data, within YHERY (20) days for rearbity pay Shows YMO (2) pay cycles, or more Shows YID (roome

Note: ApplyOnline automatically checks for errors prior to starting the eSign request process. If any are present an error screen will display outlining the issues to be resolved.

The customer, broker and/ or broker representative must have a mobile number and email address entered in the ApplyOnline Applicants Tab

sign Request -	Validation Error			
APPLICATION CHECK	CONFIRM RECIPIENTS	SELECT PRINT FORMS	PREVIEW FORMS	SEND TO eSIGN
I Inable to start e	lectronic signature request du	ue to validation error(s).		
The applicati To review the	on is incomplete. details of the validation errors, sele	ect Fix Validation.		6
Chable O starte The application To review the Loan Application det	on is incomplete. details of the validation errors, sel ails should be completed in full and	ect Fix Validation.	icant signature(s).	G

Note: Click on 'Fix Validation' hyperlink to navigate to the ApplyOnline tab with outstanding validation errors



2. All applicants are selected automatically and must be included when using eSign.

APPLICATION CHECK	CONFIRM RECIPIENTS	SELECT PRINT FORMS	PREVIEW FORMS	SEND TO eSIGN
The eSign request will b	e sent to the following applic	cants		
The eSign request will b All applicants must be includ	e sent to the following applie ded when using eSign. If any are to	cants be excluded, please cancel and obt	ain signatures manually	
The eSign request will b All applicants must be includ Amanda Advantedg	e sent to the following applied ded when using eSign. If any are to ge	cants be excluded, please cancel and obt	ain signatures manually	
The eSign request will b All applicants must be includ Amanda Advantedg Mortgage Broker	ee sent to the following applie ded when using eSign. If any are to ge	cants be excluded, please cancel and obt	ain signatures manually	
The eSign request will b All applicants must be includ Amanda Advantedg Mortgage Broker To edit applicant nan	e sent to the following appli ded when using eSign. If any are to ge nes, please go to th <mark>e Applicants Ta</mark>	cants be excluded, please cancel and obt b in ApplyOnline and update the re	ain signatures manually Ievant fields	

Note: Click on 'Applicants Tab' hyperlink to edit applicants name if required

- 3. Click Next button
- 4. All eSign enabled forms in the Supporting Docs submission checklist are selected automatically and are mandatory when using eSign

Note: You can preview the generated print forms prior to sending by clicking 'Preview Print Forms'

e\$	ign Request - Select Print Forms	×
_	·	
	APPLICATION CHECK CONFIRM RECIPIENTS SELECT PRINT FORMS PREVIEW FORMS SEND TO USIGN	
	Confirm which print form(s) requires eSign for the previously selected applicant(s) (Note: ALL mandatory eSign enabled print forms on the checklist must be included when using eSign. If any are to be excluded, please cancel and obtain signatures manually)	
	Short form application	
	Sixed Rate Authority	
	Broker Interview Guide	
	Don't see your form here? Either the print form needed is not e Sign enabled, or your application data is missing the right detail to trigger the required print form.	
	Select Send To eSign to submit the request now. Alternatively you may choose to Preview Print Forms prior to submission to eSign.	
Car	Back Preview Print Forms Send to	Sign

5. Click 'Send to eSign' and the selected documents will be made available in a secure portal for the recipients to review and sign

-	CONFIRM RECIPIENTS	SELECT PRINT FORMS	PREVIEW FORMS	SENT TO eSIGN
	Your	eSign request is on it's	way!	
• Emails have now b	een sent to you and your customer	(s). Please check your email in the r	text few minutes, and advise you	r customer(s) to do the
same. These emails • You may check the • To cancel this requ	status of your request via the Stat est, select the <u>est</u> Cancel eS	us Tracking Tab or the Documents ign request link, which is posit	tab in ApplyOnline. tioned left of the eSign status ind	icator.
same. These emails • You may check the • To cancel this requ	status of your request via the Stat est, select the <u>e</u> Cancel eS	us Tracking Tab or the Documents ign request link, which is posit	tab in ApplyOnline. ioned left of the eSign status ind -or - Select field -	cator.



Submission Checklist view

Each condition card with an eSign enabled document will display 'eSign Pending' badge and status of the eSign request will display 'Sent' indicating email notification has been sent

	To start drop your documer	its here - or - Select file(s) ~	Acceptable fil
ubmission checklist scuments required at submission time.		C₂-	
Show outstanding only		🕀 Prin	t checklist
Broker Interview Guide (1 Applicant) 400642639-ADV	Home Loan Application Form (1 Appli , 400642639-ADV	Customer Identity Check 1 Amanda Advantedge	An email notification has PAYG Income. Sent to at least one recipi Amanda Advantedge - DEPARTMENT OF B
Broker Interview Guide Foi documenti attached	Advantedge Home Loan Short Form	Primary Photographic Iden 1 Productments attached	+ Payslip Ne diconverts attached
 Signed, dated and completed in full by broker and applicant(s) 	 Signed, dated and completed in full by all applicant(c) and troker 	Shows primary photographic identification of the applicant: Shows clear identification details Primary Photographic Iden. Indecement antibude	 Shows most recent payslip Dated within TWENTY ONE (21) days of application date, within THIRTY (30) days for monthly pay Shows WMO (2) pays vorkes, or more Shows YTD Income

Recipient eSign process (Docusign)

The steps involved to electronically sign a document are as follows:

- 1. eSign recipient receives an email notifying them that a document requires their signature.
- 2. Click 'Review Documents' button to open secure portal

	•	
Mortgage Bro	ker sent you a document to re	eview and sign.
	REVIEW DOCUMENTS	

3. Recipient is prompted to complete SMS Authentication process

Security Requests from Sender
Mortgage Broker NextGen - Advantedge
SMS Authentication
In order to access this document, you need to confirm your identity using your mobile phone.
 Choose a phone number below and select the 'Send SMS' button to receive a text message. Enter the access code on the following page.
Authenticating Signer Name: Amanda Advantedge
Please select a phone that can receive text messages so you can authenticate:
 +61 499 990 661
SEND SHS CANCEL
If you do not have access to your mobile phone at this time, select "Cancel" and retry when you have access.

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Note: Mobile number can be edited in this screen. Customer would need to contact broker to edit details in ApplyOnline Applicant Tab

4. Click 'SEND SMS"



- 5. Enter DocuSign authentication code received via SMS
- 6. Click 'CONFIRM CODE'



- 7. Tick box to agree to use of electronic records and signatures
- 8. Click "Continue" button

Documents for review displays

Please review the documents below.	FINISH	OTHER ACTIONS 🔻
Q Q 🕹 🖶 🛱 Ø	Finish Later	
START Doudlign Enviroy 10: 30211045-E014-0785-6782-086234050571 Doudlign Enviroy Toma Product Active Proceedings Production Council and Product P	Print & Sign Assign to Some Decline to Sign Help & Support	ione Else
Date: 20 May 2000 Short Form Loan Application	About DocuSign View History View Certificate View Electronic	n 년 (PDF) 년 Record and Signature
BROKER DETAILS	Disclosure Session Informa	ation
Buar name Cropping name C Morgage Bruker Prove name: Fas name: Email address: Antergravity code: Subsequent code: 123		

To see full list of actions that can be completed click 'OTHER ACTIONS'

- o Finish Later
- Print & Sign
- Assign to Someone Else

Assign to Some	one Else
* Required	
Email Address for the Ne	v Signer *
New Signer's Name *	
Please provide a reason f	or changing signing responsibility
Please provide a reason f	or changing signing responsibility
Please provide a reason f	or changing signing responsibility
Please provide a reason f	or changing signing responsibility
Please provide a reason f	or changing signing responsibility
Please provide a reason f	or changing signing responsibility
Please provide a reason f	or changing signing responsibility neone Elise button will sand a notification to the person to whom you assigned ander will also receive a notification. You will be added as a Carbon Copy (CC
Please provide a reason f 250 characters remaining Selecting the Assign to Sor this envelope. The original recipient.	or changing signing responsibility memory files button will send a rooff-action to the present to whom you assigned ender will ado notevin a notification. You will be active as a Cathon Copy (CC
Please provide a reason f 250 characters remaining Selecting the Assign to Sor this envelope. The original recipient.	or changing signing responsibility neone Else button will send a notification to the person to whom you assigned ender will also meave a notification. You will be added as a Carbon Copy (CC



• Void (will cancel the eSign request and all other recipients will be notified)

Void Envelope	×
By voiding this envelope, recipients can no longer view it or sign enclosed documents. Recipients will receive an email notification, which includes your reason for voiding the envelope.	
Reason for voiding:	
200 characters remaining	
VOID CANCEL	
Correct	

- Help & Support (opens in new tab)
- About DocuSign (opens in new tab)
- View History
- View Certificate (PDF) (opens in new tab)
- Session Information

Please review the documents be	low.								FINISH	OTHER ACTIONS -
		Q	Q	±.	Ð	다	0			
START	DocuSign Envelope ID: 07548822-8687-4687-4 Administrative Services Pry Ltd Administration Conference Administration Administration Conference Administration Conference Administration Conference Administratio	IOA3-036/	AB4DF6I	D1D	DE PR 99	MONSTI IOVIDED 9 3rd Ave w.docusi	RATION BY DOG , Suite 1 ign.com	DOCUMENT ONLY CUSION ONLINE SIGNIG SERVICE 1709 - Sautha - Washington 99104 - (200) 218-0 Ochoicelend	200	N
	Date: 20 May 2020				Sh	ort I	For	m Loan Application		lag ^a
	BROKER DETAILS									
	Broker name: Mortgage Broker			- i	Company	name				
	Phone number: Fax number:				lmail add amanda	iess: a.ray@r	extgen	Linet		
	5uboriginator code: 123									

Use scroll function to review all documents to be signed Action bar at top of screen enables recipient to:



- $\circ \quad \text{Zoom in} \quad$
- \circ Zoom out
- o Download
- o Print
- o Add Comment
- o Help
- 9. Click 'START' to begin the signing process

The recipient will be taken to first section of the document/s that require signing

ct the sign field to create and a	dd your signature.	FIN
sign	Constraints of page laters 1/2 Constraints of the states questions and notified the applicant(s) of the rank associated with their selected loan floatings Constraints of the states questions and notified the applicant(s) of the rank associated with their selected loan floatings Constraints Constr	-



10. Click 'Sign Here' within signature box

Recipient will be prompted to "Adopt Your Signature". They have the option to Select Style, Draw or Upload signature by clicking on the relevant tab

ng ²		
Confirm your name, initials, and signature.		
* Required		
Full Name*	Initials*	
Mortgage Broker	MB	
PREVIEW	Change	e Sty
PREVIEW Docusigned by: Mortaan Broker MB	Changi	e Sty
PREVIEW Docušipned by: Mortzay Broker EACTEOGRAFEARF.	Change	e Sty
PREVIEW Docusigned by: Mortgage Broker EACTEONEDAGEBAR-	Changi	e St

11. Click 'ADOPT AND SIGN' button

Adopted signature will be inserted into the document and document dated as at time of signing

ack	inowledge that I have asked all the above questions and notified the applicant(s) of the risks associated with their selected loan features,
inciu	ang tre risks identified above.
Brok	er Full name
	Network Barlan
Mr	Mortgage Broker
Siar	Required - Signature Applied - signHere
	Docusigned by:
X	Mortman Broker 5/20/2020
	EACTEDADAREMAN
4.7 1	Product Selection
Prod	is section needs to take place having regard to the outcome of the requirements and objectives' enguiries set out above. The broker must
aive	a concise narrative summary of the applicant(s) requirements and objectives and why the particular type of loan product was chosen to meet
thos	e requirements and objectives.

12. Click 'NEXT' button (if available) to navigate to the next section of the document that requires a signature or 'FINISH' to complete the signing process

Done! Select Finish to send the completed document.	FINISH	OTHER ACTIONS ¥
@ @ ₹- ➡ ₽ © ®		
We want by regulate 1/2 We want of product 2/2 K ACCOORDEDCENT BY BOOKER Following for this isotherid advant and up water questions and notified the applicant(s) of the rules associated with their advantation fractions. Booker Full and B	-	
Product electron reds to take place having regard to the outcome of the requirements and objectives' enquiries set out above. The broker must give a concise narrative summary of the applicant(s) requirements and objectives and why the particular type of loan product was chosen to meet those requirements and objectives.		

Recipient is notified that a copy of the document gas been saved to their DocuSign account. Recipient has the option to click 'LOG IN' to access DocuSign account or click 'NO THANKS' to close window

Log in to DocuSign [©]	₩.	ē×
A copy of this document has been saved to your DocuSign at log in to view it.	count. Pl	ease
Eməil amanda.ray@nextgen.net		
LOG IN NO THANKS		

Note: Download or print using icons Signing process is completed for that recipient.





Submission Checklist view

When more signatures are required by other recipients the status of the eSign request will display 'Partially Signed'

🖨 Print d	necklist 📌 Cancel eSign request 📝 Partially Signed
	At least one of the applicant's have signed the form
:	PAYG Income Amanda Advantedge - DEPARTMENT OF B
	••

When all parties have signed, the completed form is delivered as a copy to applicable recipients, and document is uploaded to respective ApplyOnline Supporting Docs condition card

DocuSign
Your document has been completed
VIEW COMPLETED DOCUMENTS
Mortgage Broker amanda.ray@nextgen.net
All parties have completed Sign document.
AdvantEdge sent you a document to review and sign.

Submission Checklist view

When all parties have signed the status of the eSign request will display 'eSign Completed'

Application ID: 400642839 5400.000 Securities: 30 EUROBIN Avenue, MANLY, NSW 2	ani Security Financial Postion Upen Summary Con	Ingkance Voter Products Exception (Income Status Tracking Ma Amanda Advantedge	Snapshot: Art Lit Srt OWW	cc Mars @
E Lender Checklists		To start drop your documen	ts here - or - Select file(s) ~	Acceptable files?
Problem All Supporting documents (trais How-to tutorials	Submission checklist Decements required at submission time.	Home Lase Application Form (1 Appl. 1 00043391-M2V	a r	Vert checking Vert checking Vert checking Amada Advantage - DEPARTMENT OF B.
Show history Show me around Revert to previous version	Balantarian Interior Gala I	Anotation test	Princy Photographic Men. I	Prote P



The completed document is automatically uploaded to the respective checklist condition card and the document 'Verified'. Click on document thumbnail within condition card to preview

 A backchannel message is sent to notify the sender that the signed documents are waiting, and the application may be submitted (subject to no other outstanding mandatory documents)

Viewing documents in ApplyOnline

To view signed documents and certificate of completion perform the following steps:

1. Upon logging back into ApplyOnline, the broker will click on the Supporting Docs tab and be presented with a screen as seen below.

) 😑 😑 🙁 Show outstanding only		e Prir	t checklist 📝 eSign Completed Send docum
Broker Interview Guide (1 Applicant) 1 400642639-ADV	Home Loan Application Form (1 Appli 1 400642639-ADV	Customer Identity Check I Amanda Advantedge	All recipients have signed the required fields. Signed copies are now attached to the checklist
Broker Interview Guide	Advantedge Home Loan Sh	Primary Photographic Iden I Ne documents structed	Payslip No documents attached
	A Possible Tax File humber: Edit now	Shows primary photographic identification of the apolicant Shows clear identification details Net Primary Photographic Iden. g to document student	Shows most recent payslip Dated within TWENTY ONE (21) days of application date, within THIRTY (30) days for monthly pay Shows TWO (2) pay cycles, or more Shows YTD Income
Deposit Paid 1 30 EUROBIN Avenue MANLY NSW 2095	Rate Lock Application (1 Applicant) I \$400,000 - Performance Plus - Lock Fixed 2	Additional Documents (Optional) 400642639-ADV	
Receipt of Deposit Paid No documents attached	C Fixed Rate Authority Form	Q Additional Documents 1 edge Certification FOP	

The completed (signed forms);

- o Has attached itself automatically to the relevant condition
- \circ $\;$ An eSign certification is attached to the 'Additional documents' section $\;$
- o The condition is self-verified automatically (indicated by the green).
- You may hover the mouse over the attached file to edit/preview the signed form prior to submission.
- Other supporting document conditions may be actioned prior to or post completion of signed forms. However, it may only be sent to the lender once the eSign request is completed.
- 2. Click on 'Additional Documents' condition card to view eSign Certification

- N	100000000000000000000000000000000000000		
 Addition Documents (Optional) 	Centificate Of Completion Energy in Nuclearable 14 Automatives	Address of the second sec	Tene Company
400642639-ADV	 Robert Sage Australia Berner Fraham Desiment Augus 1 Cartholis Robert Robert Damme Dealers Too Dam 2012-1100 Carbons Measure	Department 1 Johnson 1 Santres	Develope Organitie Anartei Room Lawe 11, Salts Stead Melsonie Referenze 201 Brooks Salt Salt of Al
	Record Tracking		
	 These Depent 11 of annual count	Hole: Janathar Male atranta, faidh satain car	Looden Deuflyn
	Signer Events	Signature	Tmotony
Additional Documents	2.011 (Rained annuals rep-0.02) produces Samarik carde Errori, Annual Autoritation	Sec Mand	Sect. 17-07-0020 (19.25 Teared, 17-07-0020 (19.85 Report 17-07-0020 (19.85
eSign Certification.PDF	Anna Adventuator	Service Master Provident Type (ang/P Internet 14 202 202 48	
	 Bernard Aufer, Sammer Steiner, Sa	ana kan	
	annahar Walds	Tame take	Red (101-200) (121
	AND Society and Treat Annual Advertision (Revit Advertision)	Section Adaptic Proceeding Sys- Using P Meson 14.20220.0	Spreet (7 (5 (2028)) 10 (10
	Activation States Market States (1988) Conservator Province States (1988) Conservator Province States Province States Province States Province States Balances Report or States Institutes Records or Conservator		
	in Person Oper Events	Spates	Timestony
	Editor Dalivary Events	Status	Treating
	Agant Dollwory Events	Setus	Timestong
	Intermediary Delivery Events	Sec	Timestern



Cancel an eSign request

To cancel a pending eSign request perform the following steps:

- 1. Open the Supporting Docs tab in ApplyOnline
- 2. Click on 'Cancel eSign request' from the top right-hand side of the checklist (see below)

	To start drop your docume	nts here - or - Select file(s) v	Acceptable f
ubmission checklist acuments required at submission time.			
Broker Interview Guide (1 Applicant)	Home Loan Application Form (1 Appl., ,	Customer identity Check Amanda Advantedge	checklist Concel eSign request Seet
Broker Interview Guide He decovered attached (wildigs heading)	Advantedge Home Loan Short Form He decommends attached (edisign Pending)	Primary Photographic Iden	+ Paysip Indecoversumeded
 Signed, dated and completed in full by broker and applicant(s) 	 Signed, datad and completed in full by all applicant(b) and Insiler 	Shows primary photographic identification of the applicant Shows clear identification details Primary Photographic identification This photographic identification	 Shows most recent pays[p Dated within TWENTY ONE (21) days of application date, while THETY (20) days for monthly pay Shows TWD (2) pay cycles, or more Shows TWD (2) pay cycles, oremore

3. Confirm you wish to cancel the eSign by clicking on 'Cancel eSign Request' button

eSign Request - Cancel Request	×
Are you s you want to cancel the request for Electronic Signatures? Select Cancel eSign Request to confirm eSign is not required. This will cancel All eSign requests for all recipients Where signatures were obtained from one, or several recipients using eSign, these forms will be deleted and not returned to ApplyOnline.	
Do not cancel Cancel eSign Req	uest

Submission Checklist view

Once cancelled the status of the eSign request will display 'Cancelled' indicatin the E-Signature process has been cancelled by the broker

🔒 Print checklist	× ∉eSi	gn request 🕜 Cancelled Se	end documents
		E-Signature process has been	
neck		PAYG Income	1
		Amanda Advantedge - DEPARTME	NT OF B

Recipients receive email notification the eSign request has been voided by the broker



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Important

You may only cancel an eSign request whilst it is in progress, i.e. one or more signatures are outstanding.

Cancelling an eSign request will cancel ALL print forms for ALL recipients. If any print forms were partially signed (by one or several recipients) it will delete those as well.

You cannot partially cancel an eSign request.

Icons overview

Definitions

(A)	eSign is available for this document
0	eSign request is in progress for this document
0	Cancel the eSign request
0	Warning message regarding the eSign request
\odot	Documents successfully sent to selected recipients for electronic signature

FAQs

Q: How do I resend a document for electronic signature?

A: You first need to cancel the incomplete eSign request. Once cancelled you can begin a new request. *Note: cancelling a request will delete ALL signatures previously obtained for ALL recipients*

Q: Where can the applicant download a copy of the document they signed?

A: Once each recipient has signed the document, they will then be emailed a copy for their own records

Q: Can I use my phone to sign a form?

A: Yes. Applicants may use their tablet, mobile phone or desktop to sign forms electronically

Q: Can I submit an application while there is a pending eSign request?

A: No. All parties must have signed the required forms before an application can be submitted to the lender

Q: My eSign request shows 'Declined' what does that mean?

A: At least one recipient has declined to sign the document(s). Manual verification must now be completed. The eSign request is now cancelled

Q: What happens if I cancel an incomplete eSign request?

A: Cancelling an incomplete eSign request will cancel the whole request for all recipients regardless if they had signed or not. All signatures previously obtained will be deleted

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