

Learning & Development

**Borrower Esigning** 

Revised 06.28.2022

# Borrower E-Sign

The borrower e-Sign process is outlined in our Octane eSign tutorial video that you can share with them. We've outlined the process step-by-step so you can assist them if necessary.

## 1. Register Account

- a. Find Email labeled 'You invitation to Octane'.
- b. **Click** Registration link.
- c. **Create** Password/Select security question.
  - i. (Optional) Complete 2-Step Verification.
- d. Click 'Complete my Account'
- e. Sign In.

### 2. Accessing Loan Portal

- a. **Click** Loan address on the left.
- b. **Review** Terms and conditions.
- c. **Click** | accept.
- d. Click Next.
- e. Enter Loan Key.
  - i. (Borrower) If they have a cell number in Octane:
    - 1. Click 'Resend Loan Key'.
    - 2. Look For text with Loan Key.
  - ii. (Broker) If they aren't getting a text:
    - 1. **Go** To their loan in Octane.
    - 2. Click Borrowers Screen.
    - 3. Click Borrower's name.



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- 4. Click Loan Key Verbiage.
- f. Click Submit Key.

### 3. (Borrower) Click To-Do.

- a. **Click** Application Disclosure.
- b. Click Review E-Sign.
- c. **Follow** Docusign prompts.

### 4. Octane eSign Video Tutorial Link

### Need help?

- Wholesale Support (855) 399-6242
- Resource Library

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