

Loan Officer E-Sign Instructions

Cardinal Financial Company - Wholesale

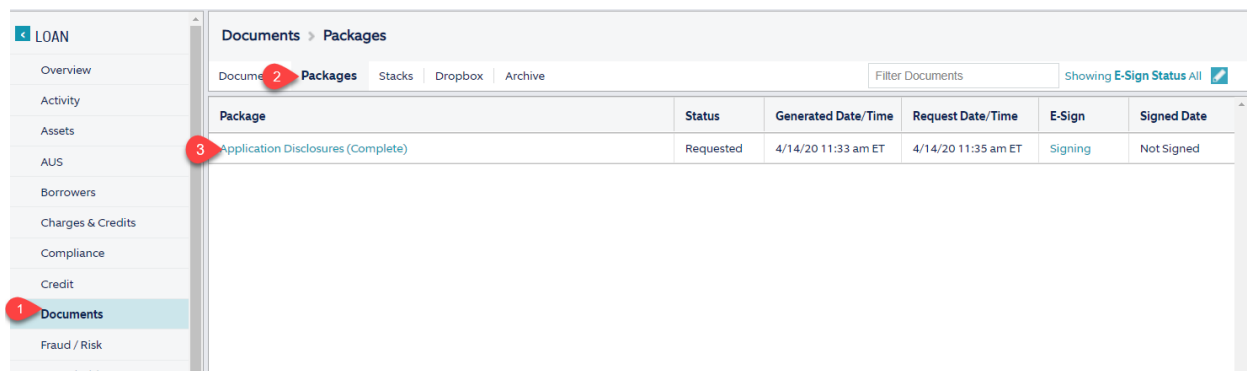
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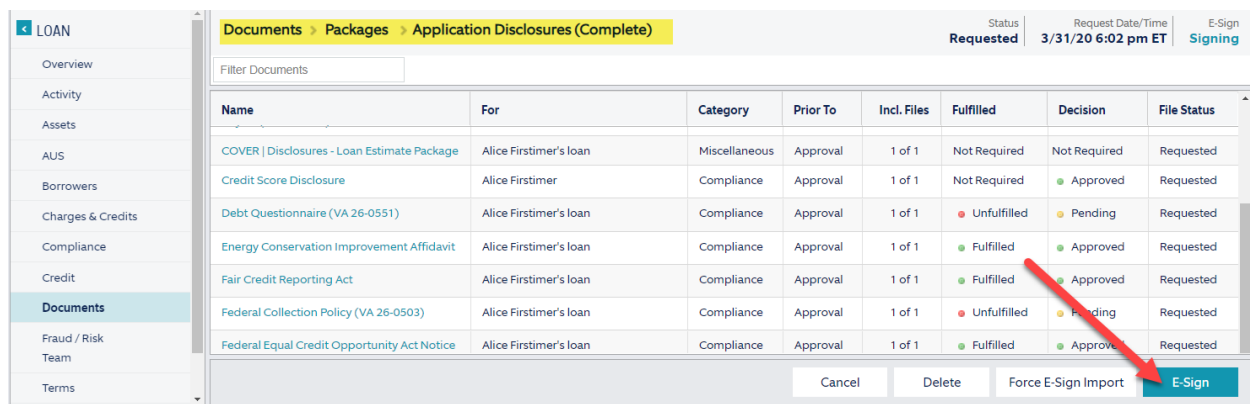
Full Access Credentials

Loan officers with **Full Access Credentials** will need to log into Octane in order to complete their e-signatures.

In order for the Loan Officer to complete their e-signature in Octane, they must navigate to the **Documents screen>Package Tab>select the Application Disclosure (Complete) package.**

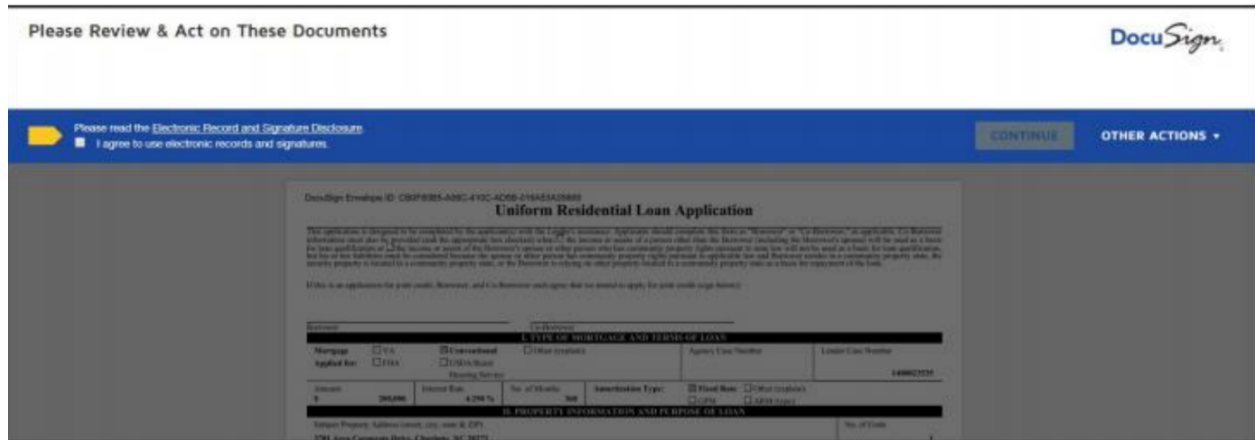


Once in the loan package, the Loan Officer should locate the teal **E-sign button** at the bottom right-hand corner of the screen.



By clicking the **E-sign button**, the Loan Officer opens the **DocuSign Screen** which shows the initial disclosures in their entirety and allows the user to e-sign each applicable field.

Note: If clicking the E-sign button does not open up a new tab with the DocuSign documents, please make sure the user's internet browser does not have Pop-up Blockers turned on. **Pop-up Blockers should be turned OFF when working in Octane.**



The initial disclosures package will be imported into Octane automatically once all parties have applied their e-signature.

****As Always, should you have any questions, please reach out to Client Care at 855-399-6242****

References

Reference List
Octane

Revision History

Date	Description	Approver
10.5.20	Initial Release	Nyreen Huyser
10.7.20	Revised	Timothy Williams
3.4.2021	Revised	Timothy Williams
