

Wholesale Loan Officer E-Sign Instructions Revised 3.4.2021

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.**

LOAN	Documents > Packages					
Overview	Docume 2 Packages Stacks Dropbox Archive		Filter Documents		Showing E-Sign Status All	
Activity	Dackage	Statue	Generated Date/Time	Pequest Date/Time	E-Sign	Signed Date
Assets	Fachage	Status	Generated Date/ Time	Request Date/ Inne	L-Sign	Signed Date
AUS	3 Application Disclosures (Complete)	Requested	4/14/20 11:33 am ET	4/14/20 11:35 am ET	Signing	Not Signed
Borrowers						
Charges & Credits						
Compliance						
Credit						
Documents						
Fraud / Risk						
Household Income						

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

< LOAN	Documents > Packages > Applica	tion Disclosures (Complete)				Status Requested	Request Date/ 3/31/20 6:02 pr	Time E-Sign n ET Signing
Overview	Filter Documents							
Activity	Name	For	Category	Prior To	Incl. Files	Fulfilled	Decision	File Status
Assets	· · · · · · · · · · · · · · · · · · ·							
AUS	COVER Disclosures - Loan Estimate Package	Alice Firstimer's Ioan	Miscellaneous	Approval	1 of 1	Not Required	Not Required	Requested
Borrowers	Credit Score Disclosure	Alice Firstimer	Compliance	Approval	1 of 1	Not Required	Approved	Requested
Charges & Credits	Debt Questionnaire (VA 26-0551)	Alice Firstimer's Ioan	Compliance	Approval	1 of 1	Unfulfilled	Pending	Requested
Compliance	Energy Conservation Improvement Affidavit	Alice Firstimer's Ioan	Compliance	Approval	1 of 1	Fulfilled	Approved	Requested
Credit	Fair Credit Reporting Act	Alice Firstimer's Ioan	Compliance	Approval	1 of 1	Fulfilled	 Approved 	Requested
Documents	Federal Collection Policy (VA 26-0503)	Alice Firstimer's Ioan	Compliance	Approval	1 of 1	Unfulfilled	• Funding	Requested
Fraud / Risk	Federal Equal Credit Opportunity Act Notice	Alice Firstimer's Ioan	Compliance	Approval	1 of 1	Fulfilled	Approve	Requested
Terms	•			Cancel	De	elete Force	e E-Sign Import	E-Sign

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.



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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.**

Please Review & Act on These	Documents		DocuSign
Please read the <u>Electronic Record and Sam</u> Please read the <u>Electronic Record and Sam</u> I agree to use electronic records and s	ofue Declosure graduros,	CONTINUE	OTHER ACTIONS +
	Describing throwing ID: CB398885-ABC - 100 - ADDE 204AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA		
	Homograph Diversion Diversion Appendix and the state of the s		

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



Wholesale

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References

	Reference List
<u>Octane</u>	

Revision History

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