## Loan Officers & Teams:

The Borrower's Certification & Authorization will be auto-added to the borrower's Needs List for early eSign - no action needed from your side.

There is no change in behavior for your borrowers - it functions just like the disclosure package experience. The borrower will receive a branded email notification, guiding them to their Needs List where the signing links will be broken out for each borrower. Once they create a password and log in, they can complete the Docusign experience and the task will get removed from their Needs List.

| 🌌 Email Notification   | 🎤 New Task on Needs List  | 💶 Tasks Split by Borrower   |
|--|---|---|
| 8 8 0 b C :  | Capital Bank  | Capital Bank  |
| ou Have Documents to Review 🗰 🗶 🖧 🖨<br>apital Bank & Trust -rooreply-Mongage/Techdics.com  | Your Loan Dashboard   | < Review & Sign   |
| Capital Bank<br>bits Titut<br>We've added documents for you to review and eligits to keep your mortgage application meeting<br>tomad: Review review and sign - meeting   | Documents to Review & Sign<br>You have some documents that are<br>ready for review / electronic<br>signature.<br>Documents we need you to upload  | ∠ Borrower's Documents<br>Login to your account to review and sign the<br>documents we need to close your loan.   |
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|  | Your Loan Team<br>Loan Officer<br>Lois Rates  |   |
| <i>«</i>   |   |   |
| <i>≌</i> Login Screen  | Task to Sign  | Docusign Interface  |
| Log In Helio Borrower. If you are not the Borrower please do not continue. Check the email you received to make sure you are loggin to the appropriate account. Username Password  |   | Image: Service and compile         Borower's Cartification & Authorization         Image: Service and Service                   |
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This aims to drive efficiency by collecting required documentation earlier and more consistently, reducing follow-up and ensuring smoother processing.

Questions? Reach out to your team lead or system admin.

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