

Broker Steps to Complete eSign with OneSpan



The following steps demonstrate the process for a business partner to locate their OneSpan access code and complete the eSign process.

Step

Access Account Settings from profile icon in top right corner of Blueprint





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Step	
2 Locate eSign Access Code	 Access code is set to the last 4-digits of the office phone number at the time the profile was created. The accuracy of this code depends on the information entered during profile creation.
	 Users can update their eSign access code at any time by entering a new code in the eSign Access Code field and clicking Save Changes.

 Once the eSign Access code is changed, it will only apply to disclosure packages sent after the change was made. The updated access code will not work on previously sent disclosure packages.

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*							
Đ	My Account						Save Changes
₩	My Employee Details		Pipeline Access	ss Credit Vendor Credentials		N	otifications
1 6	Account						
2	Account Username Training.bp.01	Employee Role	eSign Access Code	⊐J			
	Name						
	First Name	Middle Name	Last Name	Suffix			
	Test Broker		AE 01				
	License						
	Originator NMLS License #*						
	Contact						
	Office Phone Number*	Office Extension	Cell Phone Number				
	222-222-2222		222-222-2222				

Open OneSpan email and select 'Review Document'

ne ne	ewrez
	NewRez LLC sent you a document to review and sign.
There are follow syst electronica disclosure	disclosures in the OneSpan package that require your signature. Pleas em prompts from within the disclosure package to complete and illy sign disclosures that request an electronic signature. Read the (s) carefully and contact your manager with any questions.



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Step

- 4 Click 'Authenticate' and enter Access code. Then click 'Login'.
- Users have 6 attempts to enter the password before being locked out.



5 Attest to Electronic Record and Signature Disclosure and select 'Accept'.







Step

6 Select 'Next' and click 'Sign' for all required signature fields.



Click 'Confirm' when finished signing.

• A **Done** icon will appear in the left margin when all required signatures have been captured.

			Done.4
rabo") In addition, will a recommend that you also your income, expenses, ar	also assess how much money you have left over each consider these same factors when determining how m all savings priorities to stay within your budget.	month after paying your debts. We such you can afford to repay based on	
Signed by	<u> </u>	10-03-2024	
ODDINE Leboer Representative		LARSE	
By signing below, I we on for a mortgage loan, and payment, employment and • All information a • Those or model	etify the following about the information and docume fusing information about the purpose of the loan, if d income information, and assets and liabilities: and documentation provided is true and correct to the b and commentations: an information.	ntation provided with my/our request be amount and source of the down sent of my knowledge;	
I am not avante o me through the I Lundentand my have provided st	of any omissions, misstatements of fact, or missepres loan process; and obligation to assend and or supplement the informatis should change prior to closing of the mortgage loan.	entations made by persons assisting on provided if any of the facts that I	
B 2024 Certes Switces, LLC 2482024 - 8708003 Beetrowe ATE Cestification	Page 1 of 2	842014	
Disclosure Documents_207fc28d-27ee	Disclosure Documents. 2075/284-378e-4c6c-3279-584465489s5e		Page 59 of 78
	E-SIGNED by Alice Firstimer	Date 10-03-2024	
Applicant - A	LICE FIRSTMER E-SIGNED by Bart Firstmer	Date 10-02-2024	
Please confirm to complete sig	ining.		Confirm

8 Click 'Finished' on 4506C document.

No signatures are required from the business partner on the 4506C.





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Step



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Thank you,		
Signing complete! You may now view or d	lownload your signed documents.	
We have exectling we need at this stage	e and you may close this window.	
we neve everything we need at this stage	- she get a ready where some ready and the	





Record of Revisions

Revision Date:	Revision Reason:	Created By:	Summary of Changes
7/18/2024	Created	Casey Bruins	
10/7/24	Update	Casey Bruins	Adoption of OneSpan
10/18/24	Update	Brian Rummell	Updated per Legal for approval
11/21/24	Update	Brian Rummell	Added steps to locate and change eSign access code.

