eSignature ApplyOnline User Guide

For Originators & BDMs

Version 1.0

January 2022

Get started with ApplyOnline eSignature Applications

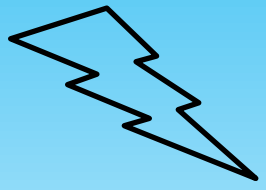
eSignature will now be available end to end, from applications to loan documentation. Originators will now be able to submit applications using eSignature functionality.

Submit New eSign Applications

1. Submit Applications – Supporting docs tab

eSign Applications Actions

1. View status tracking
2. Cancel eSign Applications
3. Resubmit eSign applications
4. View completed eSign applications



What's Changed in the Application Form

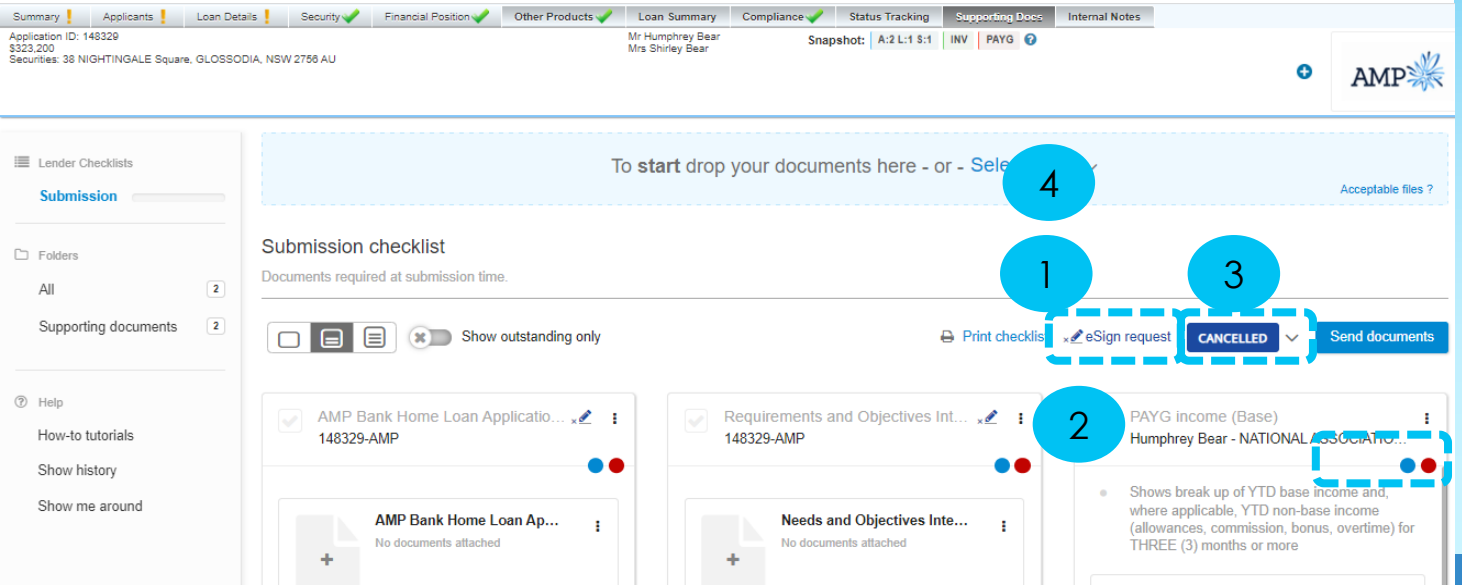
1. Summary tab
2. Application tab
3. Compliance tab
4. Status tracking tab
5. User settings

Get started Supporting Docs tab

With the Originator ApplyOnline:

Click the Supporting Docs tab. A number of functions can be preformed from this tab including:

1. Submit application documents to be eSigned
2. View status tracking of eSign applications
3. Cancel eSign applications
4. Resubmit eSign applications



Tips

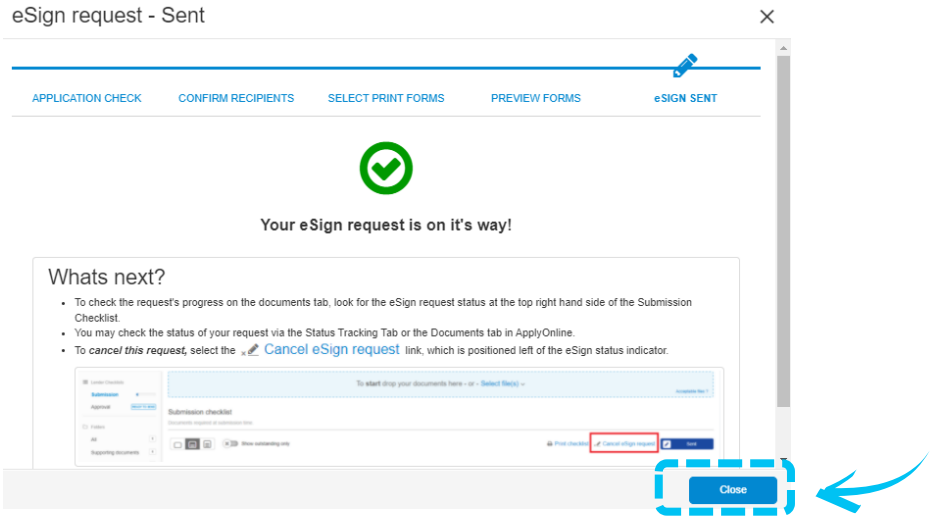
The Supporting Docs tab is where all eSignature functionality is available. Ensure to complete all other components of the Application form prior to completing the Supporting Docs tab.

Once Application documents are signed, the Originator can view:

- eSign certificate of completion
- Existing document condition cards for eSigned documents. These will be automatically updated and verified once the customer has completed eSigning of documents.

Get started Submit Application Docs for eSign

1. When your Application documents are ready to be sent for eSigning, click eSign request button. Once this button is clicked the eSign request dialogue box displays.
2. Confirm the recipients listed on the screen are correct, then select **Next**.
3. Click **Preview Print Forms**. Review all forms prior to submitting to reduce any rework.
4. Confirm the documents listed on the screen are correct, then select **Send to eSign**.
5. eSign request sending displays and your eSign request is on its way. Click **Close**.

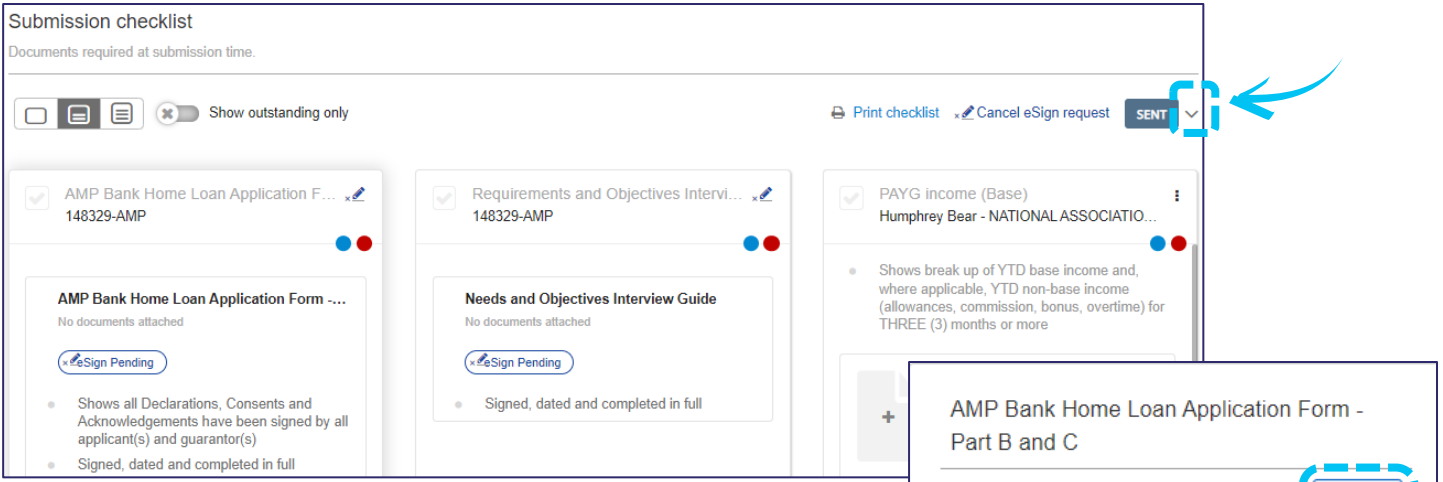


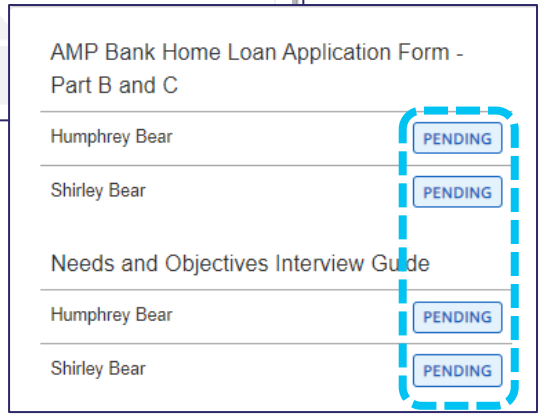
Tips

Ensure to select **Yes, I'd like to receive information by electronic communication** in the Summary tab.

Get started View status tracking of eSign applications

1. Once your application documents have been sent for eSigning, to view the status click ⌄ button.





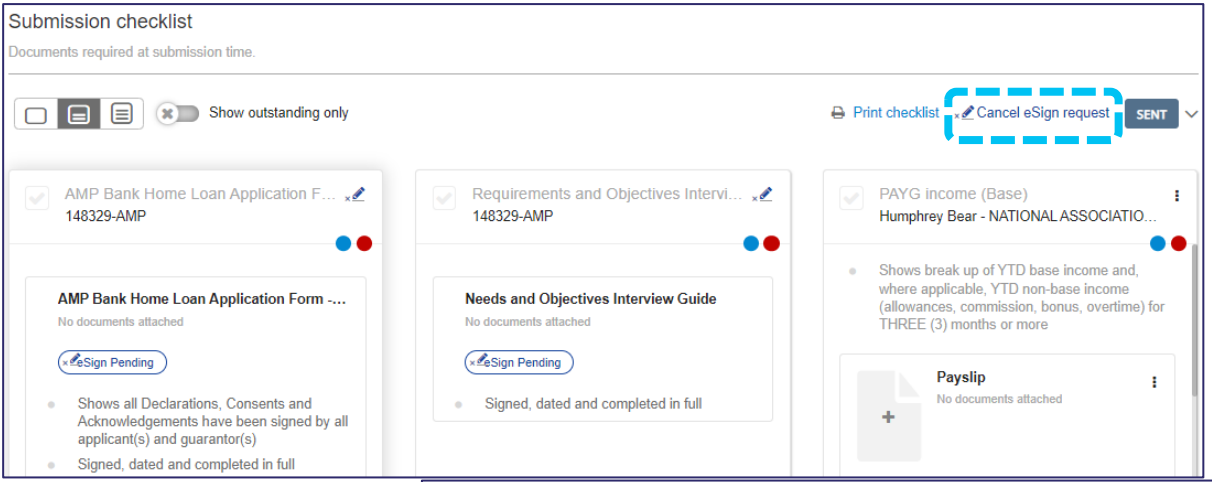
2. The status of the Loan Application Form and Needs and Objectives Interview Guide will display.

Tips

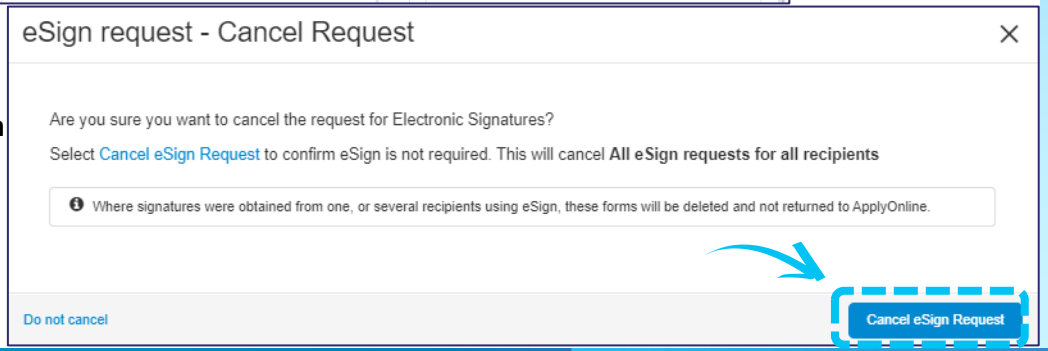
The tracking status of esign applications can also be view on the Status Tracking tab. This is at a summary level and does not list all the forms individually sent for signing.

Get started Cancel eSign applications

1. To cancel an eSign application once submitted, click the Cancel eSign request button.



2. The eSign request – Cancel Request dialogue box displays. Click **Cancel eSign Request** button.



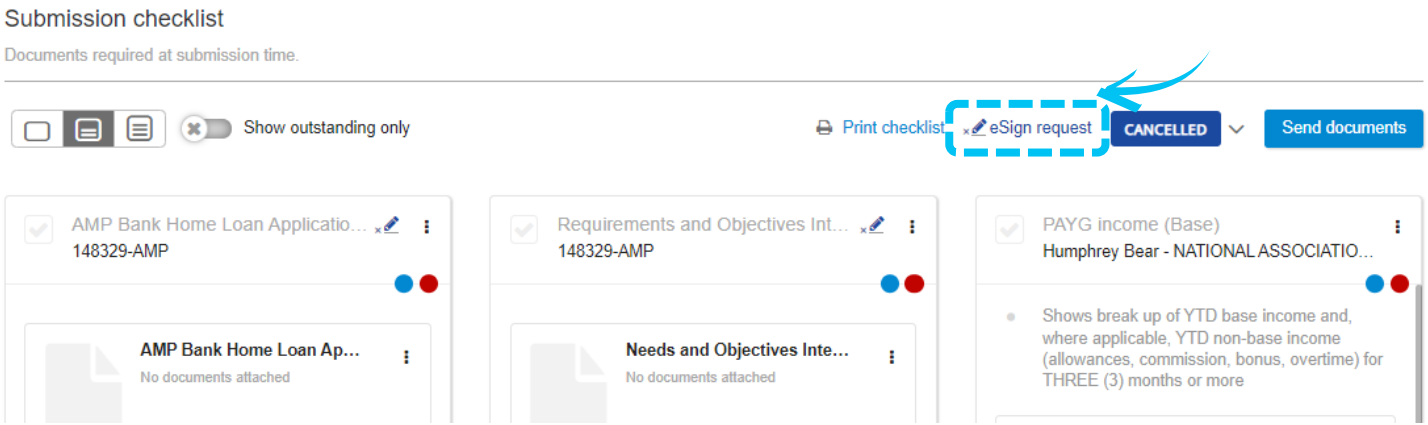
Tips

If the Cancel eSign button has been clicked in error, click the **Do not cancel** button.

Once cancelled, the Submission checklist screen will display a new CANCELLED button.

Get started Resubmit eSign applications

1. To resubmit an eSign application once cancelled, click the eSign request button.



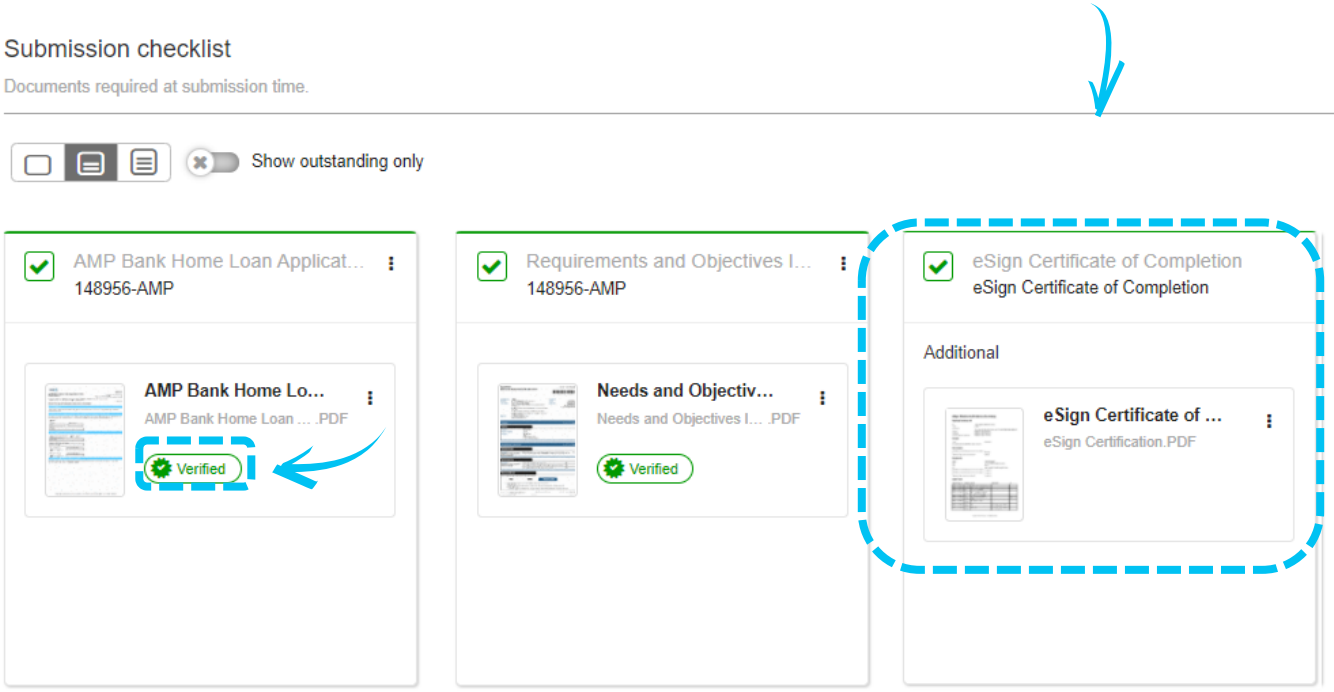
2. Follow the steps for Submit Application Docs for eSign.

Tips

The tracking status of multiple eSign applications can be viewed on the Status Tracking tab.

Get started View completed eSign applications

1. Once Application documents are signed, the eSign certificate of completion can be viewed.
2. The existing document condition cards for eSigned documents, will automatically be updated and verified once the customer has completed esigning of documents.
3. The status of the Checklist through to Lender receipt is updated automatically.



Tips

The tracking status of eSign applications can also be view on the Status Tracking tab. This is at a summary level and does not list all the forms individually sent for signing.

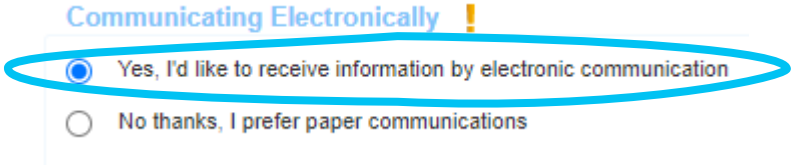
What's Changed? Summary tab

Within the Originator ApplyOnline:

1. Click the Summary tab.
2. Scroll down to the Referrer section.
3. New Referrer ID fields (optional fields).

Communication preference:

1. Scroll down to the Communicating Electronically section.
2. For eSignature applications, select Yes, I'd like to receive information by electronic communication.



Tips

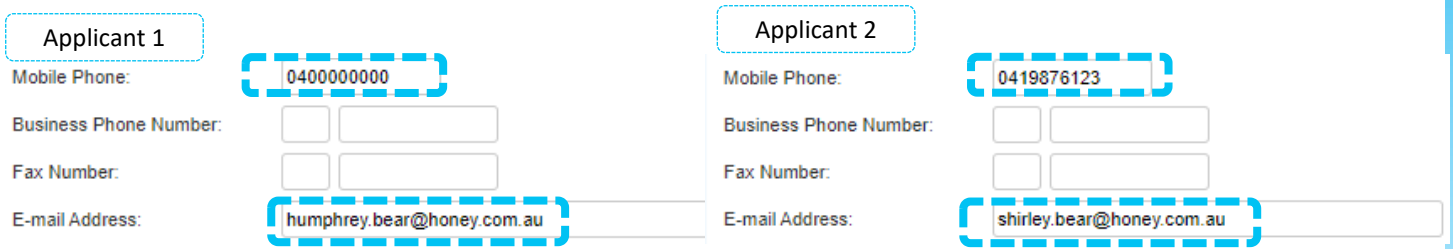
eSign is only available for applicant(s) whom have elected electronic communications.

Applications received which have been eSigned but communication preference is paper, will be immediately RMI'd back to the Originator to either have the customer elect for electronic communications or provide traditional 'wet signed' applications forms.

What's Changed? Applicants tab

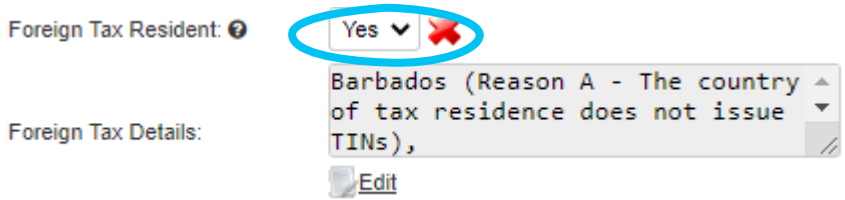
Within the Originator ApplyOnline:

1. Click the Applicants tab
2. Ensure all Applicants record unique mobile number and email address.



New fields:

1. Scroll down to Foreign Tax Resident field.
2. From the drop down list, select either Yes or No.
3. If Yes is selected, Foreign Tax Details Editor displays for further information.



Tips

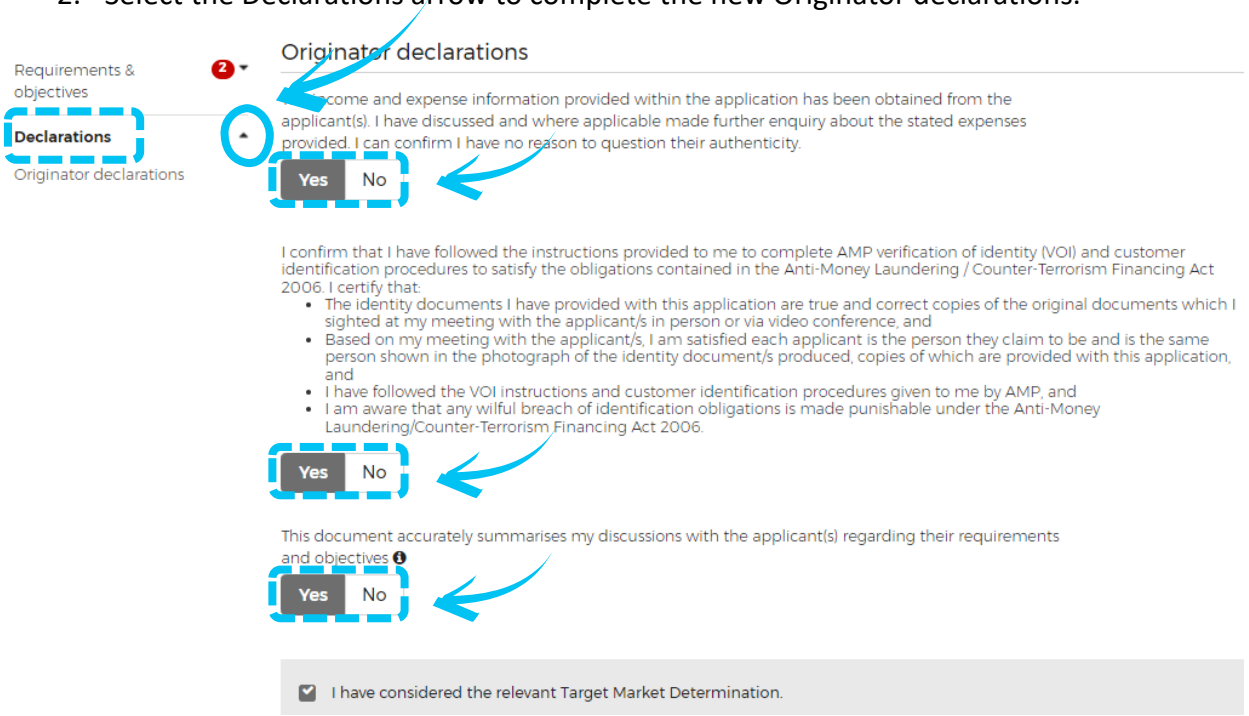
All Applicants must have a unique **mobile** and **email address**. For multiple applicants, if one applicant elects to receive their documentation by post, all applicants will also need to complete the form via this method.

If **Yes** is selected in the Foreign Tax Resident field, the Country/Jurisdiction must be selected and either Tax Identification Number (TIN) or Reason TIN Not Provided must be completed.

What's Changed? Compliance tab

Within the Originator ApplyOnline:

1. Click the Compliance tab
2. Select the Declarations arrow to complete the new Originator declarations.



Tips

The new Originator Declarations section replaces the need for a wet signature by the Originator.

What's Changed? Status Tracking tab

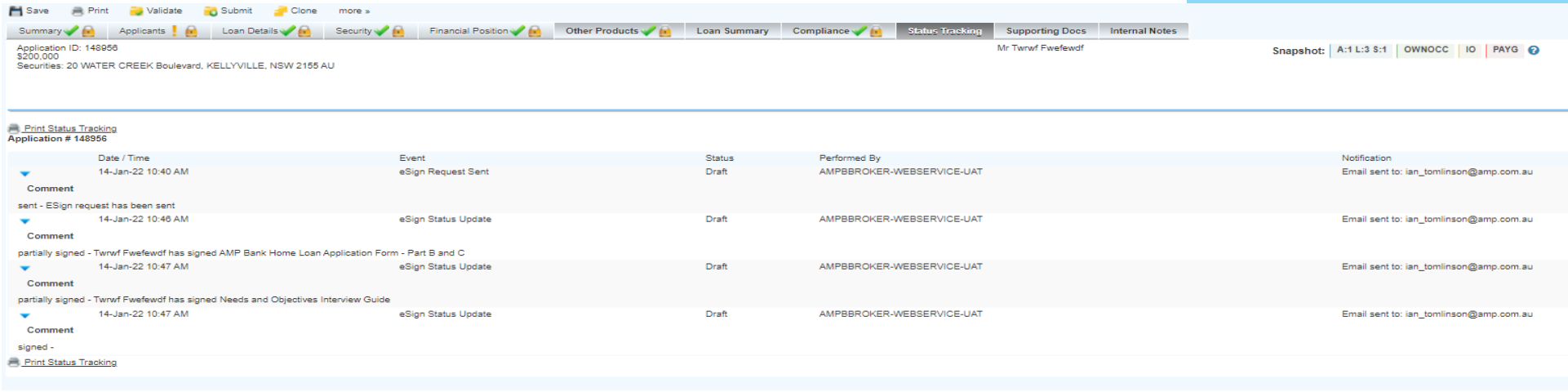
Within the Originator ApplyOnline:

1. Click the Status Tracking tab
2. The Status Tracking tab provides details on all loan application and approval statuses including:

- Application submission date and time
- Application status
- And who submitted the application

Tips

There are multiple ways to track the status eSign status.



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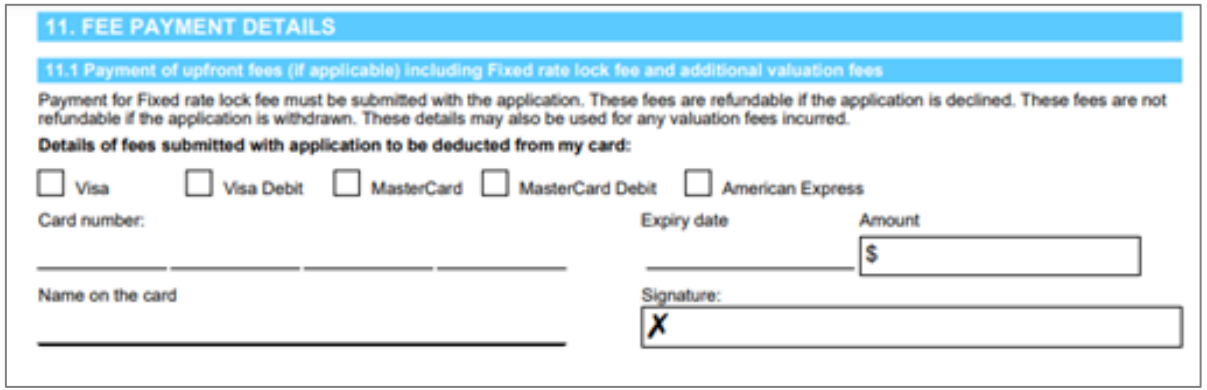
What's Changed? Removal of Fee Payment

Within the Loan application form:

1. The Fee Payment Details has been removed as detailed below.



Tips

When a customer needs to pay any up front fees such as the Secure Rate Guarantee Fee or any adhoc Valuation Fees, the CSO (Onshore) will be calling the customer directly for these details.

AMP will ID the customer as part of the call. If unsuccessful, they will leave a message and also leave a condition so they can't proceed to formal approval without the fee being charged.

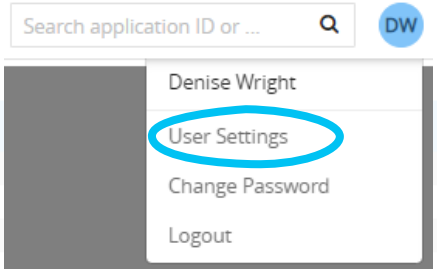
Note: Currently not all Customers provide Credit Card details in the Application form for SRG and/or Valuations. This process is currently in progress

What's Changed? eSign User Settings

Within the Originator ApplyOnline:

To receive updates regarding the submission and signing status of eSign applications, notifications need to be activated.

1. Select User Settings and the View settings for: <Name> screen displays.
2. Scroll to the eSign notifications and click the tick box to the right.



Tips

If the User Settings are not flagged, email notifications will not be sent. To view the status, the Originator will need to log onto Originator ApplyOnline and check either the:

- Supporting Docs tab, or
- Status Tracking tab

AMP bank