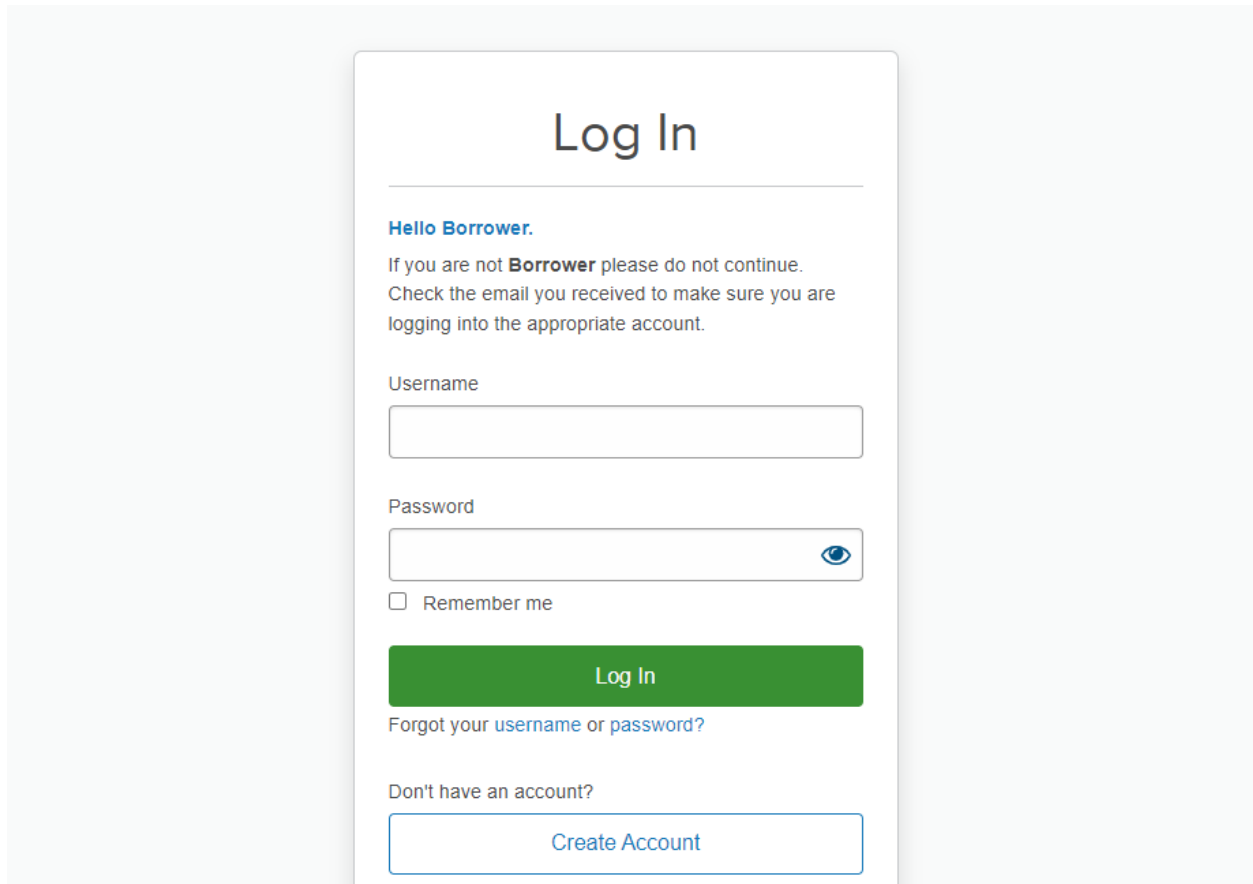**How - To Guide: Navigating the Borrower Portal**

1. The borrower receives email notice that tasks have been assigned.

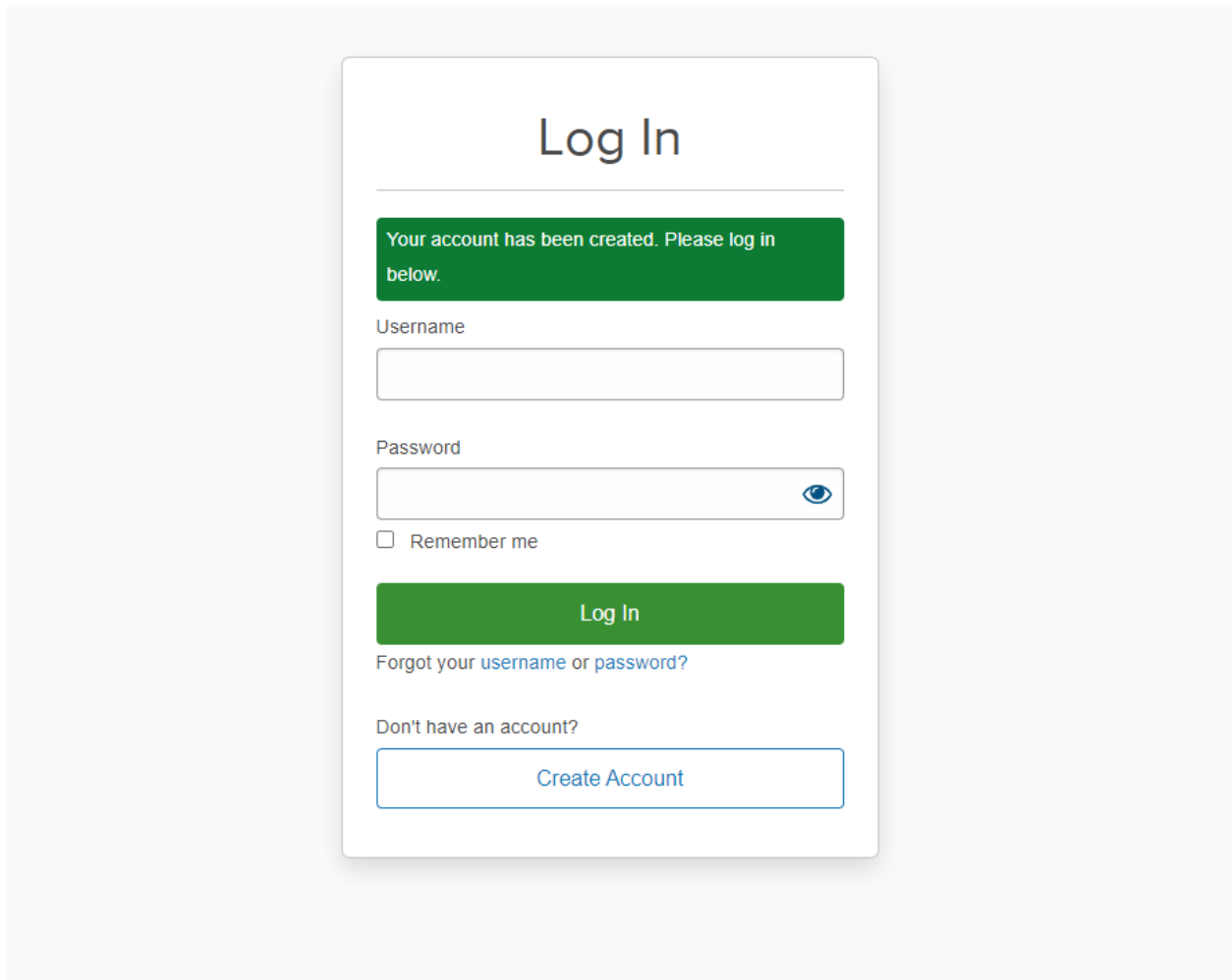2. Once the borrower clicks the link, they will get taken to the Sign-In for the portal.

3. Most borrowers won't have credentials so they will need to hit the "Create Account" button and provide all the required information. This will be *First/Last Name, Email Address, Phone Number, Phone Type, Username,* and *Password*.
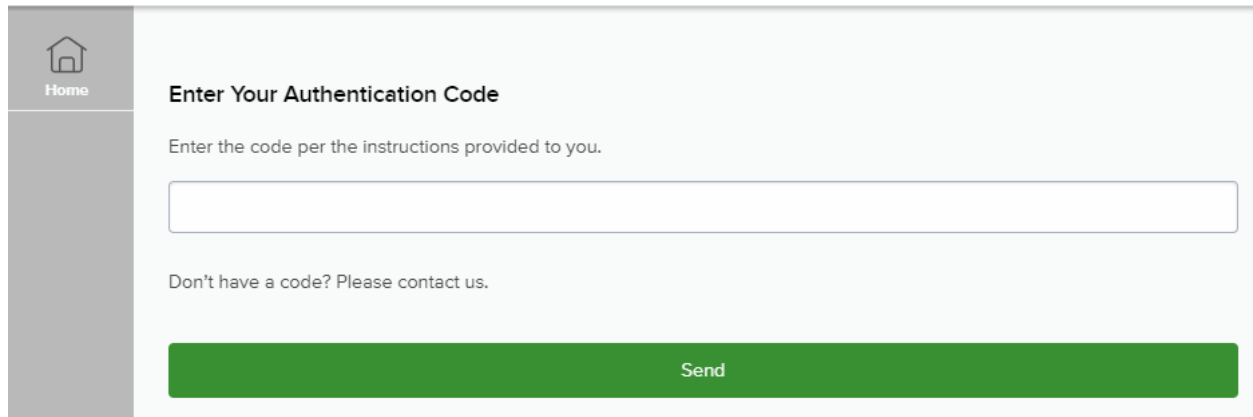
4. After the borrower creates their account, they will be prompted back to the Log In screen and be prompted to sign-in.

Log In

Your account has been created. Please log in below.

Username

Password

☐ Remember me

Log In

Forgot your username or password?

Don't have an account?
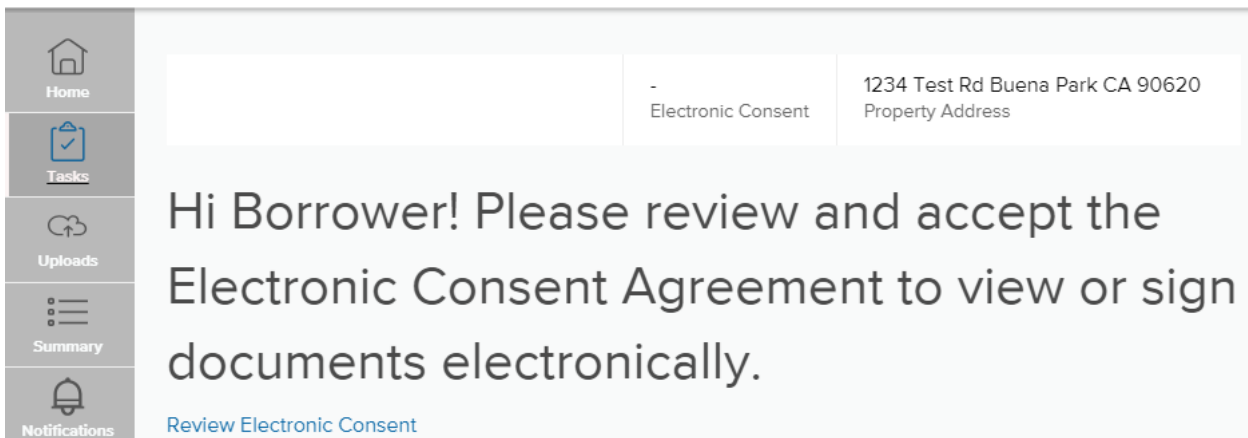
Create Account

------------ Continue to next page for Step 5 ------------

5. Once the borrower enters the portal, they will be prompted for an authentication code. This will be notated in their email – the authentication code is the last 4 digits of their SSN.

6. From there, borrowers will be taken directly to the *Tasks* tab and will be able to complete any pending items.

7. From the Navigation Side-Bar Menu, borrowers will be able to access:
   a. *Tasks* – Shows any pending tasks to the loan file.
   b. *Uploads* – Shows prior uploads and allows them to reupload documents.
   c. *Summary* – Shows a summary of their loan's details.
   d. *Notifications* – Shows any notifications tied to their files.