

BROKER

ALERT

Heritage Bank
People first.

16 October 2023

eSign availability in ApplyOnline

We are pleased to advise that effective 23 October 2023, eSign will be available to brokers in ApplyOnline, using Heritage Bank's preferred service provider DocuSign.

Applications submitted prior to 23 October 2023 will still need to have print forms printed and executed manually.

Applications submitted after 23 October 2023 will have print forms issued and executed via eSign.

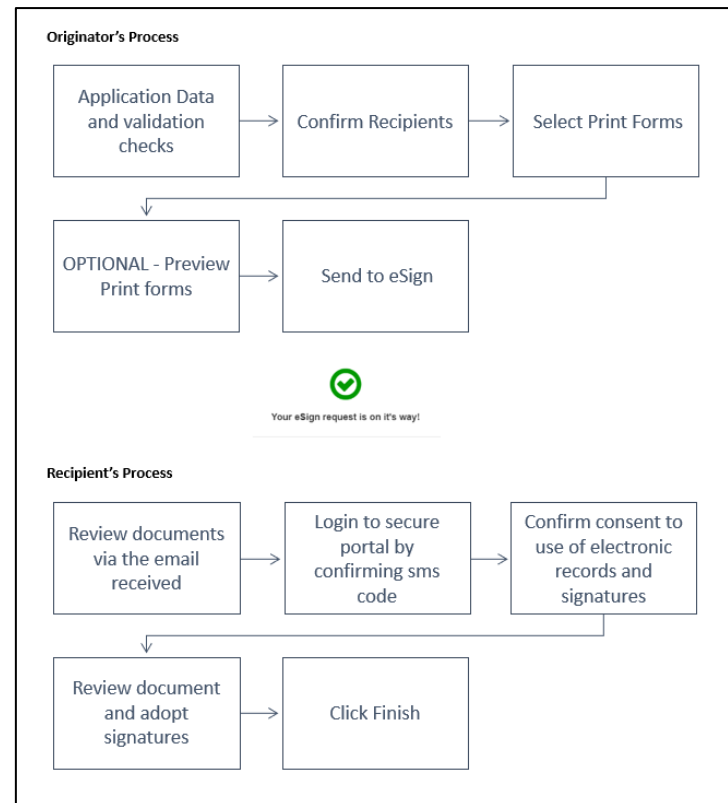
eSign for non-resident applications will be available in ApplyOnline the week commencing 20 November 2023.

An eSign Quick Reference Guide is attached to assist Brokers.

Also coming soon – DocuSign for loan offer documents.

Regards

- ✓ To use eSign, all validation errors in the application must be addressed
- ✓ Applicant(s) must have separate emails and phone numbers on the application.
- ✓ Once requested, all parties must complete the Esign request for the broker to submit the application.
- ✓ The broker can only choose to cancel an eSign request whilst the service is in progress - i.e., if one or more signatures are outstanding
- ✓ Cancelling an eSign request will cancel ALL print forms for ALL recipients.
- ✓ Upon completion, ApplyOnline will automatically attach and verify the signed print forms against the relevant conditions within the checklist – all you need to do is submit to lender as per normal process.



Common Statuses of eSign

Sent (when the eSign envelope with the required print forms have been emailed to the selected recipients)

Partially Signed (when one or more parties have signed the required print forms, but not all)

Signed (when all recipients have electronically signed all the required forms)

Once completed by all parties, the files are attached to each relevant condition and certification file will be attached to the additional documents section)

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