Loan Registration

Users will receive an email when their loan has been imported into the system. A sample of that email is below. Note that there is a register button in the email that the borrower can click on which will navigate them to the registration screen in the borrower portal.

PPPLoanSupport@jeffersonbank.com <u>via</u> sendgrid.me to me ↓	
	Jefferson Bank
	Hello Andrew Barentine, We appreciate you trusting Jefferson Bank to support your business needs. A portal has been created to help you apply for your Paycheck Protection Program (PPP) Loan Forgiveness for ATB Test 4. To access this portal, you must first <u>register and submit your application</u> . Please use the unique link below that was created for you to register and submit your application. If you have issues registering, please click the contact our support team link on the registration page. Thank you again for choosing Jefferson Bank as your banking partner.

The registration link contains a unique token specific to each borrower loan. In order to successfully register, the borrower must arrive at the registration screen using this link. The borrower will also be prompted for three pieces of information:

- SBA Loan Number or Lender Loan Number (either one)
- Loan Amount
- Last 4 digits of TIN (EIN, SSN)

Register with	lefferson Bank
Register with	Jerrerson Bank

1000000018		OR	Lender Loan Number	
100000010				
Enter the	Covered Loan Amou	int and the	last 4 of the TIN to continue.	
Covered Loan Amount				
\$100,000.00				
Last Four Of Your Business TIN	*			
				ĢĢ
Are you having trouble	eregistering? If	so, Clic	k Here to contact our s	upport team.
	5 5			

If all four items (link, loan number, amount and last 4) are correct, the user will go to the next step when they click "Next." On the next screen the user can confirm their email address, cellular phone number, and title.

i naci funce	Last Name	e *
Andrew	Barent	ine
Email *	Cellular Ph	none Number *
abarentinebdo@gmail.com	63066	01276
Existing Registered Loans:		
SBA Loan Number /	Covered Amount:	Disbursement Date:
Lender Loan Number.		
1000000001 / 1000000001	\$100,000.00	04/16/2020

Once the information has been entered, the borrower should click "Complete Registration."

They will be navigated to a final screen to create their login.

<	Cancel	
	abarentinebdo@gmail.com	
	New Password	
	Confirm New Password	
	Given Name	
	Surname	
	Create	

This screen will show the user email address from the prior screen and is disabled, so they do not need to do anything but set the password, confirm password, first name and last name fields.

When done, they can click "Create."

The user will be navigated to a login screen where they can enter the credentials they just created.

Sign in with your email address Email Address Password Forgot your password?	Sign in with your email address Email Address Password Forgot your password?	Jefferson Bank
Email Address Password Forgot your password?	Email Address Password Forgot your password? Sign in	Sign in with your email address
Password Forgot your password?	Password Forgot your password? Sign in	Email Address
Forgot your password?	Forgot your password? Sign in	Password
	Sign in	Forgot your password?

After entering credentials and clicking "Sign In", the user will be asked for their phone number to use for MFA. They will then need to choose to receive a code or a phone call to continue.

	Cancel
	Enter a number below that we can send a code via SMS or phone to authenticate you.
	Country Code
	United States (+1)
7	Phone Number
	Phone number
	Send Code
	Call Me

Cancel	
Enter a number below that we can send a code via SMS or phone to authenticate you.	
+16308099951	
Enter your verification code below, or send a new code	

(Note: If the user chose to receive a call in the prior step they just need to answer the call and press #.)

Once the MFA is confirmed the borrower will be redirected to their loan page:

Jefferso	on Bank	Storage and More - 1000000017	Help ANDREW BARENTINE				Ð	Add Delegate Save
.pplication Type: Dire	rect Entry			Welcome	Instructions	Borrower Demographics	Loan Documents	Loan Forgiveness Sumn
	Welcome Our goal is to strea	unline your PPP Forgiveness application. We have p	rovided 3 options to help you complete the process.					
	Option 1: Already com	pleted your Schedule A worksheet and your form	1 3508? Click Direct Entry to get started.					
	Option 2: 3508-EZ is an Do you thi	vailable for self-employed individuals, independer nk you qualify for EZ Form? Click here to find out!	nt contractors or sole proprietorships along with busin	esses that did not reduce	annual salary o	r hourly wages.		
	Option 3: Have not con	mpleted your Schedule A or 3508 and need help v	with your forgiveness calculation? Click Guided Entry t	o get started.				

Adding Delegates

A borrower has the option to add delegates to their loan. A delegate has the ability to fill out the loan forms, but cannot eSign the application.

d More	- 1000000017	A Help A WALTE	R HOGAN 🔻			
	Add Delegate					×
I	You may invite a delegate to o	complete this application on yo complete you will be required	our behalf. Your delegate may com to review the delegate's input, cert	plete the application and ify the application, sign it	upload your required docun and submit it.	nentation.
rg	Existing Delegates:					
L.	First Name	1 Last Name	↑↓ Email Address	î↓ Title	↑↓ Registered	†↓.
iul -			No data available in table			
					New Delega	te
Ľ						
	l fa dt false le fe des se de se		- tota - alter - tota - the boot			

The borrower would then click "New Delegate."

Add Delegate				×
You may invite a delegat	e to complete this application on yo Once complete you will be required	our behalf. Your delegate may comp to review the delegate's input, certif	lete the application and upload your requi y the application, sign it and submit it.	red documentation.
Existing Delegates:				
First Name	Last Name	↑↓ Email Address	↑↓ Title ↑↓ Register	ed ↑↓
		No data available in table		
			New	w Delegate
Invite delegate t	o this loan:			
First Name *	Last Name *	Email Address	s* Title*	
				Invite

The borrower should provide the first name, last name, email address, and title of the delegate. Then click "Invite." This will send a loan registration email to the delegate with a link to registration. A delegate must go through the same loan registration process to create an account and gain access to the loan. This is the same process the borrower went through outlined in the above section.

