

Jefferson Bank

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 via 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 [register and submit your application](#). 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.

Register →

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)

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Register with Jefferson Bank

Start the registration process with either the SBA Loan Number or the Lender Loan Number.

SBA Loan Number OR Lender Loan Number

Enter the Covered Loan Amount and the last 4 of the TIN to continue.

Covered Loan Amount

Last Four Of Your Business TIN *

Are you having trouble registering? If so, [Click Here](#) to contact our support team.

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.

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Register with Jefferson Bank

You already have an account registered with us. Here's your account information:

First Name *

Andrew

Last Name *

Barentine

Email *

abarentinebdo@gmail.com

Cellular Phone Number *

6306601276

Title *

Existing Registered Loans:

SBA Loan Number /

Covered Amount:

Disbursement Date:

Lender Loan Number:

10000000001 / 10000000001

\$100,000.00

04/16/2020

Are you having trouble registering? If so, [Click Here](#) to contact our support team.

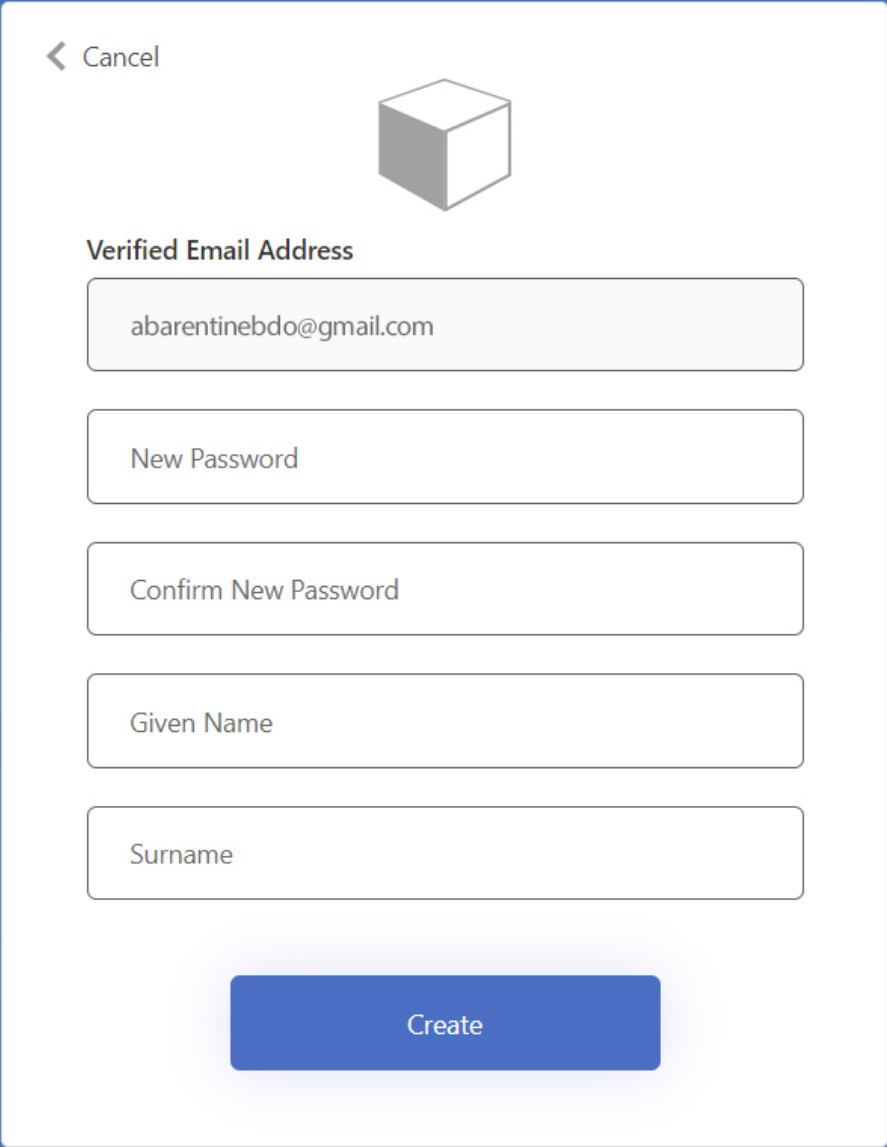
Cancel

Complete Registration


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

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

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< Cancel



Verified Email Address

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.

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Sign in with your email address

[Forgot your password?](#)

Sign in

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.

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< Cancel



Enter a number below that we can send a code via SMS or phone to authenticate you.

Country Code

United States (+1) ▼

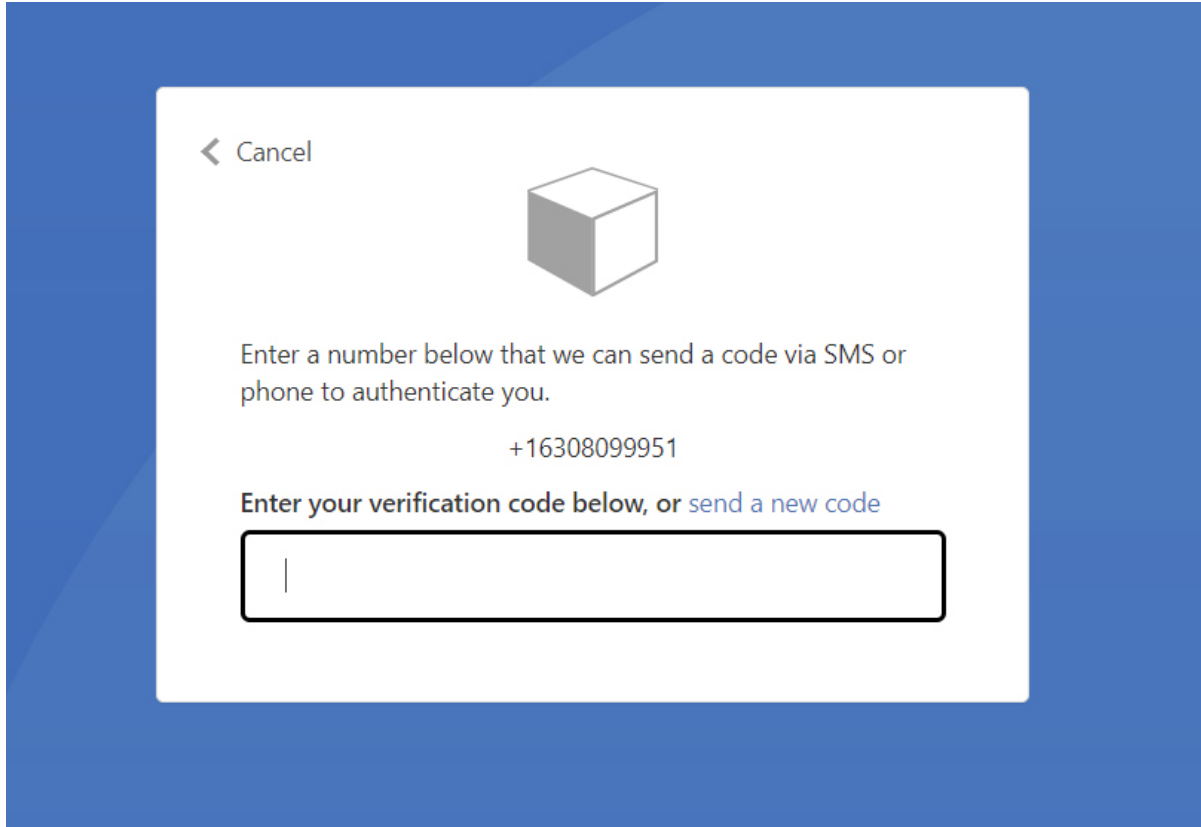
Phone Number

Phone number

Send Code

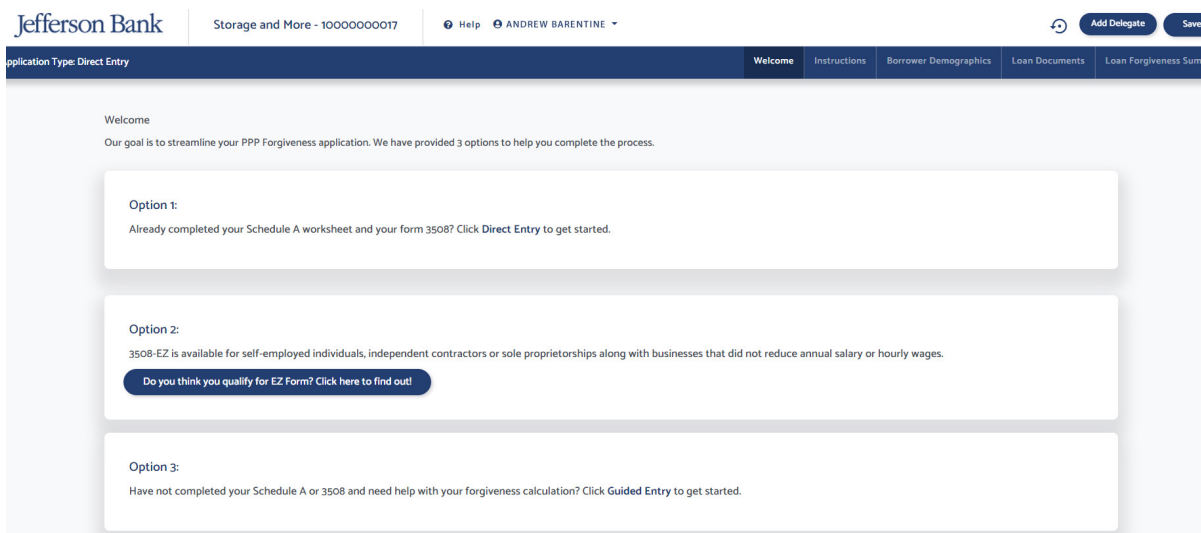
Call Me

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

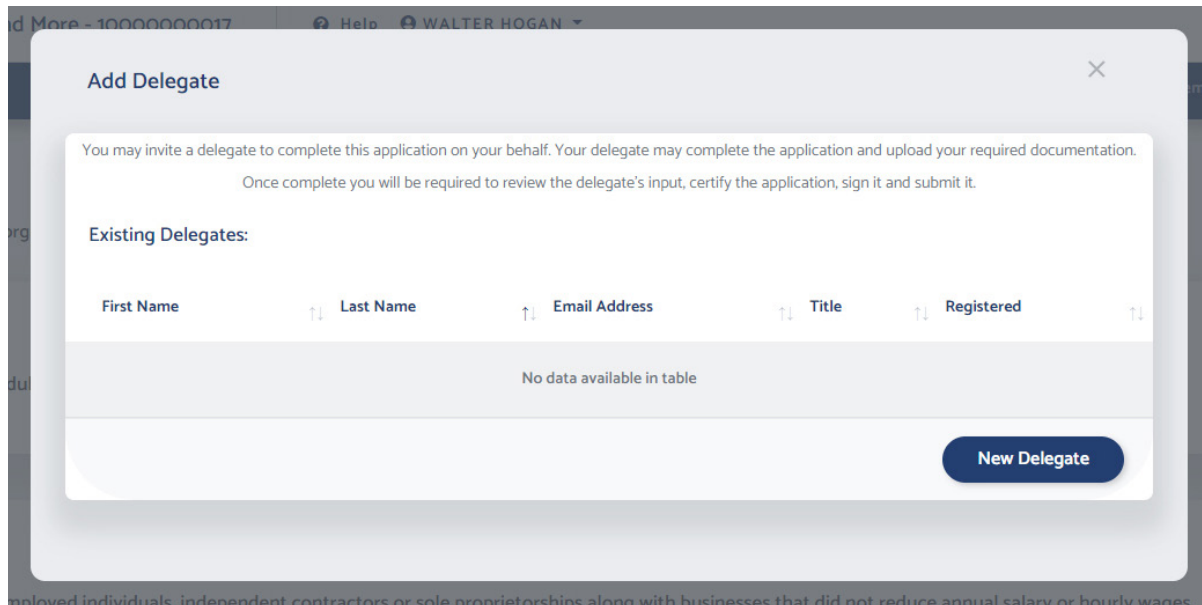
Once the MFA is confirmed the borrower will be redirected to their loan page:



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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.



The borrower would then click "New Delegate."

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Add Delegate

You may invite a delegate to complete this application on your behalf. Your delegate may complete the application and upload your required documentation. Once complete you will be required to review the delegate's input, certify the application, sign it and submit it.

Existing Delegates:

First Name	Last Name	Email Address	Title	Registered
No data available in table				

[New Delegate](#)

Invite delegate to this loan:

First Name * Last Name * Email Address * 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.

