

## Creating a New Borrower Portal Account After Submitting Your Loan Application

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This document is for borrowers who have submitted a loan application and want to create a borrower portal account. This document also applies to borrowers when the application is created by the lender in Encompass.

### To create a new borrower portal account:

1. After submitting your loan application, you will receive an email notification from your lender containing a link to a website where you can view and upload documents. The website is known as the borrower portal.
2. Click the link in the email.
3. Before the borrower portal opens, you'll need to authenticate by entering a code sent to your phone.

On the authentication screen, ensure the last four digits of your phone number are correct, then click **Text** or **Call** to receive your code. If the option to receive the authentication code via email is enabled, a "Try another way" link is displayed at the bottom of the OTP authentication screen.

## Access Your Account

In order to access your account, you'll need to enter an authentication code. How would you like it sent?

Contact me at

**Text**

**Call**

[Don't have access to your phone? Try another way](#)



## Set Up Your Account

Please note your username below and set up your password.

### Username

matthewstone

### Set Up Your Password

#### Password Requirements

- Between 8 and 64 characters
- At least one lowercase character
- At least one uppercase character
- At least one special character
- At least one numeric character

New Password \*



Confirm New Password \*



Continue

### No Set Up Account Screen?

If you already created an account using the same email address, first name, and last name, then the Log In screen will appear instead of the Set Up Account screen. Enter your password or use the **Forgot your password** link to reset it.

6. After entering and confirming your password, the borrower portal will open.

The next time you open the borrower portal, you will only need to provide your user name and password.