Oasis™ Financial
Because life moves faster than your case

Welcome to the Attorney Portal User Guide. We'll show you how to get set up to quickly, and easily handle your most common transactions with Oasis Financial like managing existing cases, payoffs, submitting new applications, reopening cases, and updating firm information.

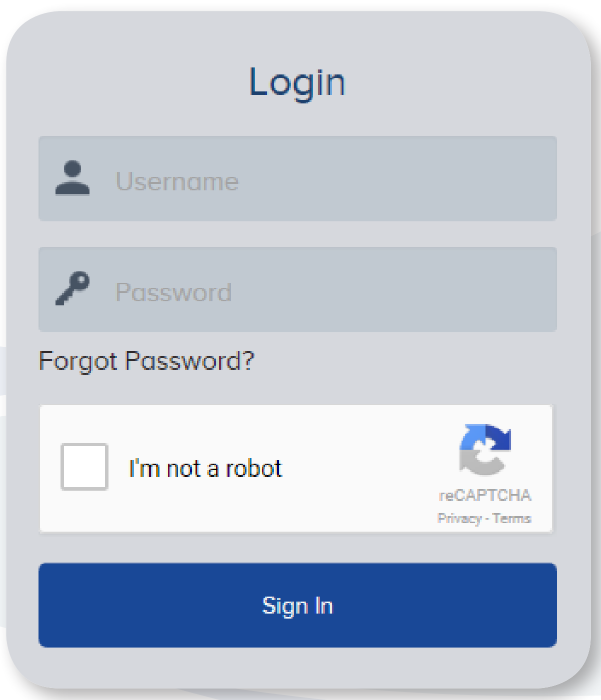
Login and Password

Your Oasis Director will assist you with the initial registration and you will receive an email confirmation with a username and temporary password.

Follow the instruction in the email to access the portal. If your temporary password has expired, you can reset it by clicking on **"Forgot Password"** and following the instructions.

In the future you can access your portal by visiting **www.myoasis.com**

Enter the user-name and password

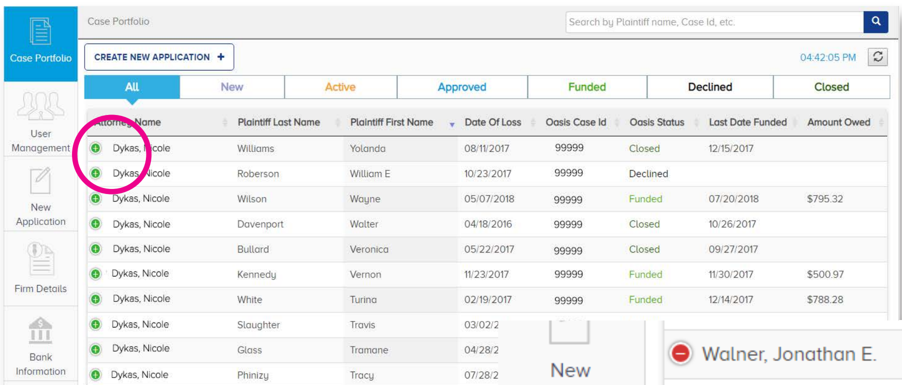


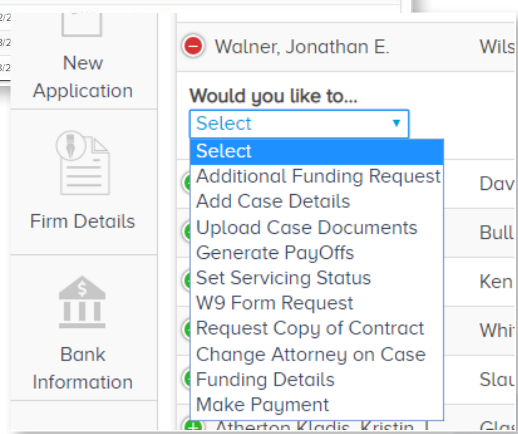
Manage Existing Cases

Under the Case Portfolio tab, you will be able to manage all your clients cases with Oasis including making online payments, requesting additional fundings or copy of contracts, adding and uploading case details and documents, viewing current or future payoffs, reopening cases, setting servicing status, and changing the assigned attorney on case. All of your current or past cases with us will be prepopulated the first time you log into the attorney portal.

To view and manage all cases with Oasis, click the **“Case Portfolio“** tab**.**

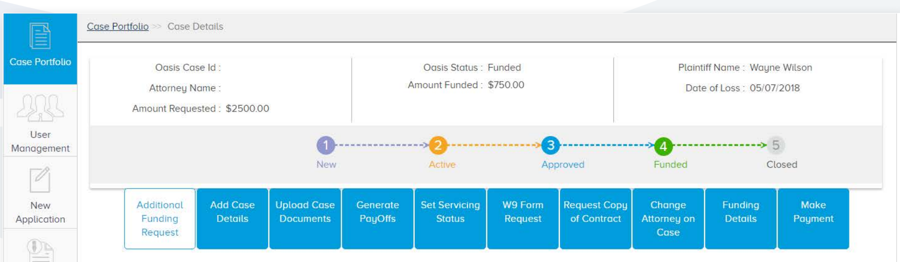
In the case portfolio dashboard you will find all new, active, approved, funded, declined, and closed cases..





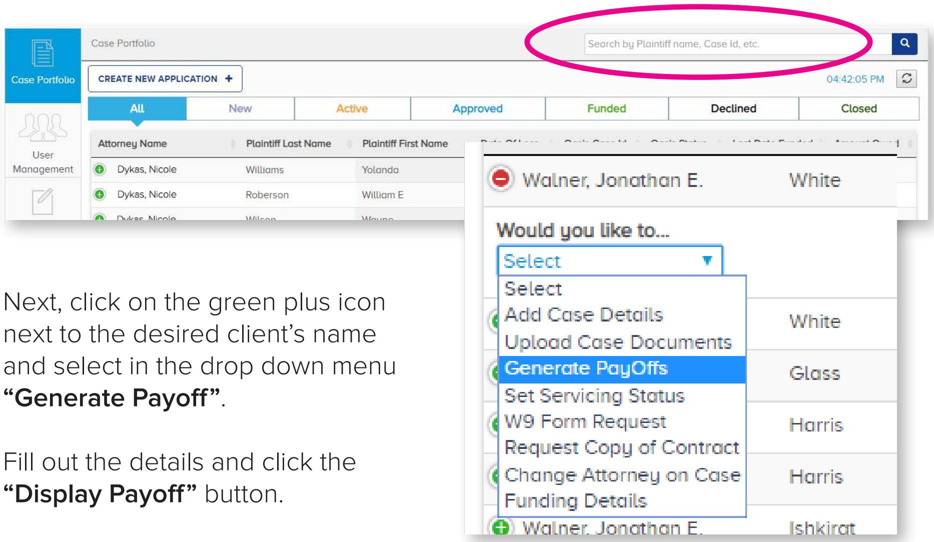
To view all features available in the case portfolio dashboard, click the green plus icon next to the attorney name listed, then click on the **“Would you like to..”** dropdown bar.

Once you have selected a task from the “Would you like to…” menu, you will be taken to a case detail page with a simple dashboard to help you complete your desired task.



Example-Generate Payoffs

To generate a payoff on a funded case, first, click the **“Case Portfolio”** and search for the client by name or case ID.



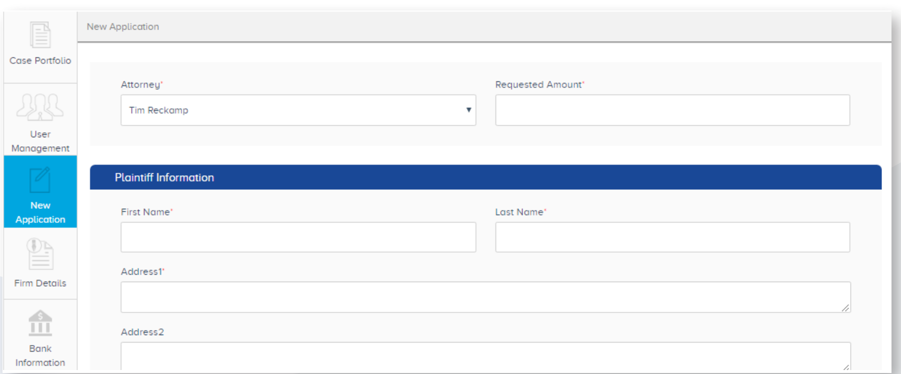
Next, click on the green plus icon next to the desired client’s name and select in the drop down menu **“Generate Payoff”**.

Fill out the details and click the **“Display Payoff”** button.

Cannot locate a client? Contact your Oasis Director or payoffs@oasisfinancial.com

Add a New Client

Under **New Application**, you will be able to submit an application for a new client online.

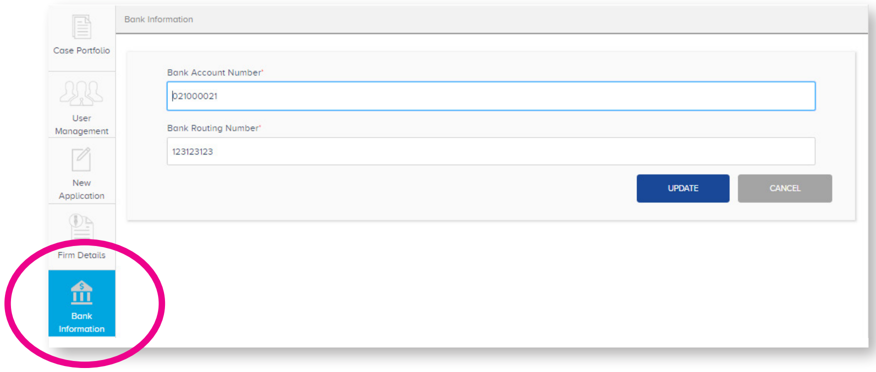


Fill in the details of the case. Required fields are noted with a red star. Fields that are optional help the support team to further manage and process the application and may decrease the need for additional phone calls or information requests.

Once completed click **submit**. You will be able to review the information on the application. Once reviewed, click submit again.

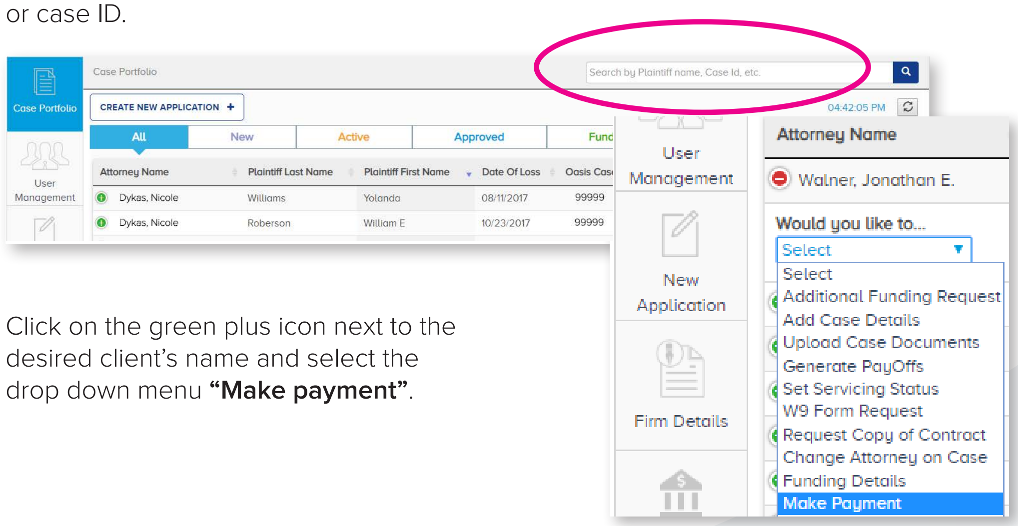
Make Online Payments

To make online payments you must first add your firms bank information. Under the **Bank Information tab**.



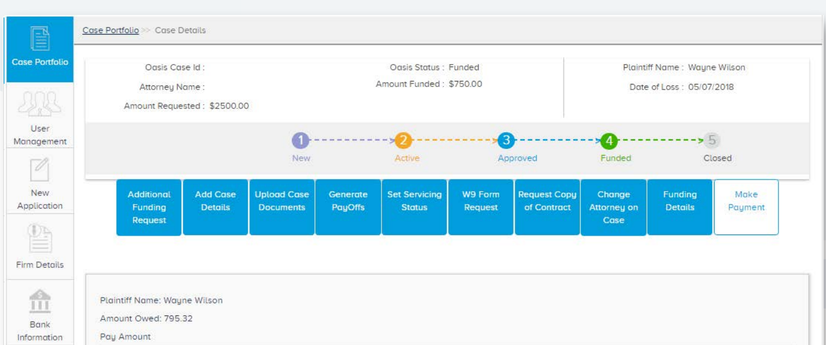
Fill in the bank account number and routing number and click **"Update"**. After you have added the banking information once, you will not need to again. You are now set to make online payments.

To make an online payment, click the Case Portfolio tab, and search for the client by name or case ID.



Click on the green plus icon next to the desired client's name and select the drop down menu **"Make payment"**.

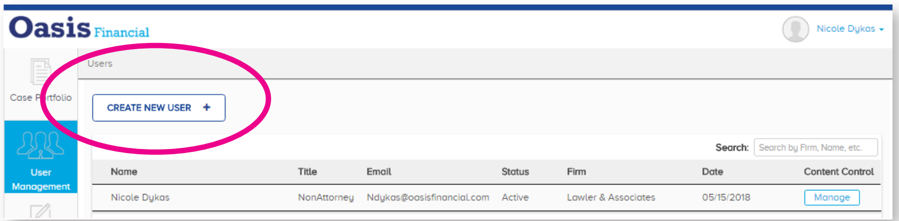
Here you will find listed the client's name and the amount owed. After reviewing the information click the **"Pay"** button to make payment. You will receive a confirmation page for successful submitted payment. The payment will take 3 to 5 business days to clear. You can contact your servicing representative for a payment receipt."



Add and Manage Users

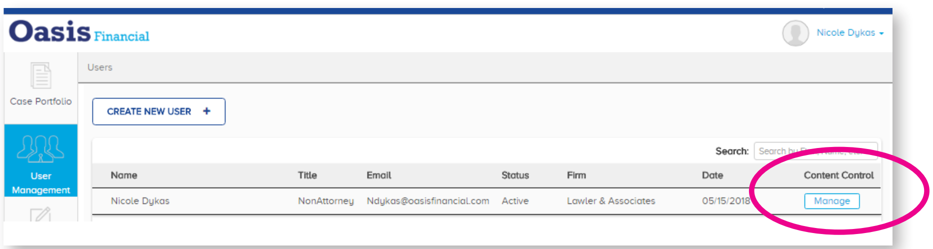
Under **User Management**, if you hold the admin account in your firm, you will be able to add and manage users, and grant rights to what users can view, edit and submit.

To create a new user, click “Create New User” button.



Fill out the details and set permissions on what each user is able to see or utilize on the portal, and click save. The new user will receive a confirmation email within 24 hours.

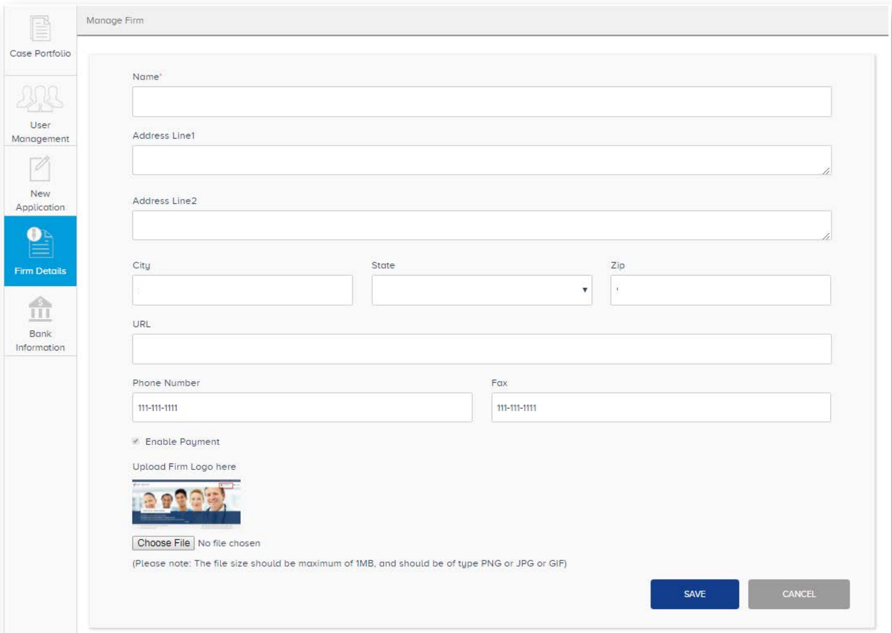
To manage existing users, click the “Manage” button



To modify permissions on an exsiting user, select where changes need to be made, and click save.

Update Firm Information

Under **Firm Details**, if you hold the admin account in your firm, you will be able to update firm information such as address, phone number and firm name. You can also personalize your portal, by uploading your firms logo in the section.



Fill in the details where changes need to be made, and click save.

Looking for Support? Contact Us.

Portal Support: Go to **www.myoasis.com/help**

Sales Support: Contact your Oasis Director