

Send Package: Order Form

The service fee to electronically disclose and sign document(s) that PPDocs generates will be \$3 per transaction effective April 15th 2016. If you choose to upload your own documents that were not generated by PPDocs, the fee is \$10 per transaction. A credit card must be on file in order to utilize the eSign products effective June 1st 2016.

You can send an eSign package after you complete an order form. When you have submitted and are able to download the package, you can now click **Send Disclosures via DocuSign**. This is for all orders, not just initials.

Send Disclosures via DocuSign® for eSIGN

As an added service to our clients, you now have the option to send your disclosures to your borrowers through DocuSign®. Please verify that these documents are correct before submitting an electronic signature request. Note: This is NOT email delivery. This method is compliant with ESIGN Act and UETA requirements.

Fee: \$3.00

Send Disclosures via DocuSign®

Email Subject, Signer's Name, Sender Name, Sender Email and **Sender Phone Number** will automatically be filled in, but are still editable. This information will default from the Mortgage Loan Originator party from the loan. The **Expires in** field is for the days the package will active for signing. Enter at least one Signer's **Name, Email** and an **Access Code** (optional) for the document to be sent to. When finished, click **Send Disclosures for ESign**. (*Note: The Access Code must be sent in a separate email for security purposes.*)

Securely send disclosures via DocuSign® to...

Email Subject:

Expires In: (days)

	Name	Email	Access Code
1.	<input type="text" value="John Doe"/>	<input type="text" value="applicantname1@gmail.com"/>	<input type="text" value="123"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="text"/>
4.	<input type="text"/>	<input type="text"/>	<input type="text"/>
5.	<input type="text"/>	<input type="text"/>	<input type="text"/>
6.	<input type="text"/>	<input type="text"/>	<input type="text"/>
7.	<input type="text"/>	<input type="text"/>	<input type="text"/>
8.	<input type="text"/>	<input type="text"/>	<input type="text"/>
9.	<input type="text"/>	<input type="text"/>	<input type="text"/>
10.	<input type="text"/>	<input type="text"/>	<input type="text"/>

Sender Name:

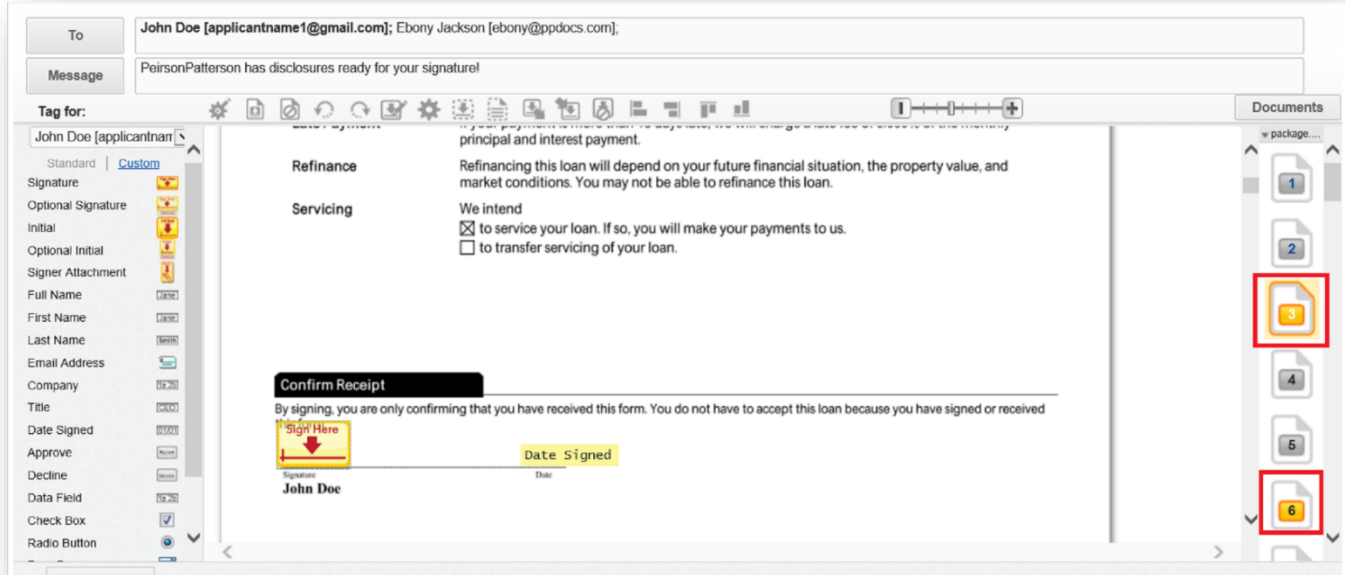
Sender Email:

Sender Phone Number:

Sender Extension:

Send Disclosures for ESign

You will be redirected to DocuSign®'s website. Signature placeholders will be automatically be placed on the document. The page menu to your right highlights the pages that need signing. You can click these pages so you won't have to scroll through the entire document.



You can make changes to the document's Signature placeholders by clicking the **Sign Here** placeholder. Three icons will now be shown: an **anchor** to keep the Signature object in its place, a **gear** for the settings of the Signature placeholder, and an **X** to delete the signature object.



To add a different Signature object click and drag **Signature** or any other object in the left hand menu and place it where a signature is required. Once you are done reviewing your document(s) click **Send**.

Tag for: John Doe [applicantname]

Standard | Custom

- Signature
- Optional Signature
- Initial
- Optional Initial
- Signer Attachment
- Full Name
- First Name
- Last Name
- Email Address
- Company
- Title
- Date Signed
- Approve
- Decline
- Data Field
- Check Box
- Radio Button

Refinance

Servicing

principal and interest payment

Refinancing this loan will depend on market conditions. You may

We intend

☒ to service your loan. If so

☐ to transfer servicing of your

Confirm Receipt

John Doe you are only confirming that you have received this for

Sign Here

Signature

John Doe

Date Signed

Send

Preview <Go Back | Save Draft | Discard Changes

A pop-up window will ask if you would like to preview the signer(s) perspective of the sent document(s). If you do not wish to preview, you can click the **Send Anyway**, to send the document(s) without viewing the applicant's perspective

Preview Signer View

Are you sure you don't want to preview what your signers will see before you send your envelope?

You can double check your work by advancing through the preview and seeing the same experience your signers will have when they receive the envelope.

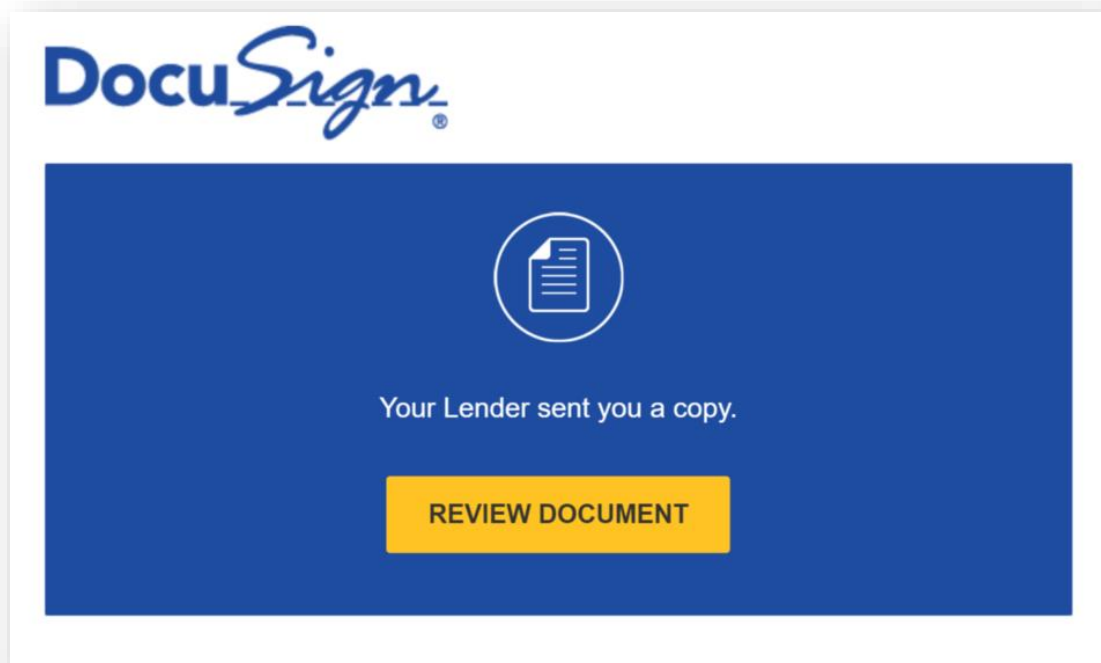
Preview Now Send Anyway

☐ Do not ask me this again


If you do choose to **Preview Now**, it will show the applicant's perspective of the document(s). Click **Send** to send the document(s) to the applicant(s).

The screenshot displays the DocuSign web interface. At the top, the 'To' field lists 'Ebony Jackson [lendername1@gmail.com]; John Doe [lendername1@gmail.com];'. The 'Message' field contains 'PeirsonPatterson has disclosures ready for your signature!'. The 'Tag for:' dropdown is set to 'John Doe [lendername1@gmail.com]'. A yellow 'Preview' stamp is overlaid on the document content. The document text includes a 'Late Payment' section, a 'Confirm Receipt' section with a 'Sign Here' prompt, and a signature line for 'John Doe'. The bottom of the interface shows a 'Send' button and navigation links: '<Go Back | Save Draft | Discard Changes'. On the right, a 'Documents' sidebar shows a list of 8 documents, with document 3 highlighted.

As a lender you will be carbon copied a copy of the documents. DocuSign® will email you with this message below.




To view the status of your documents login to your account and choose **eSign Manager** under **eDisclosures (e-Sign)**.




Documents and Disclosures

- > Casefile Manager
- > Search
- > Start a new order



eDisclosures (e-Sign)

- > eDisclosure Manager
- > Send New eDisclosure
- > **eSign Manager**
- > Send New eSign Package



eRecording

- > eRecording Manager
- > Search
- > Billing Report

The package’s status is shown under **Status** as *Sent* (highlighted in red). Click the **Loan #** to see more details.

Home > Account > eSign Manager

ESIGN MANAGER

Filter: View:

Search:

Loan #	Signers	Submitted	Status
1234567 (Cloned)	John Doe [applicantname1@gmail.com]	3/24/2016 1:20:15 PM	Sent

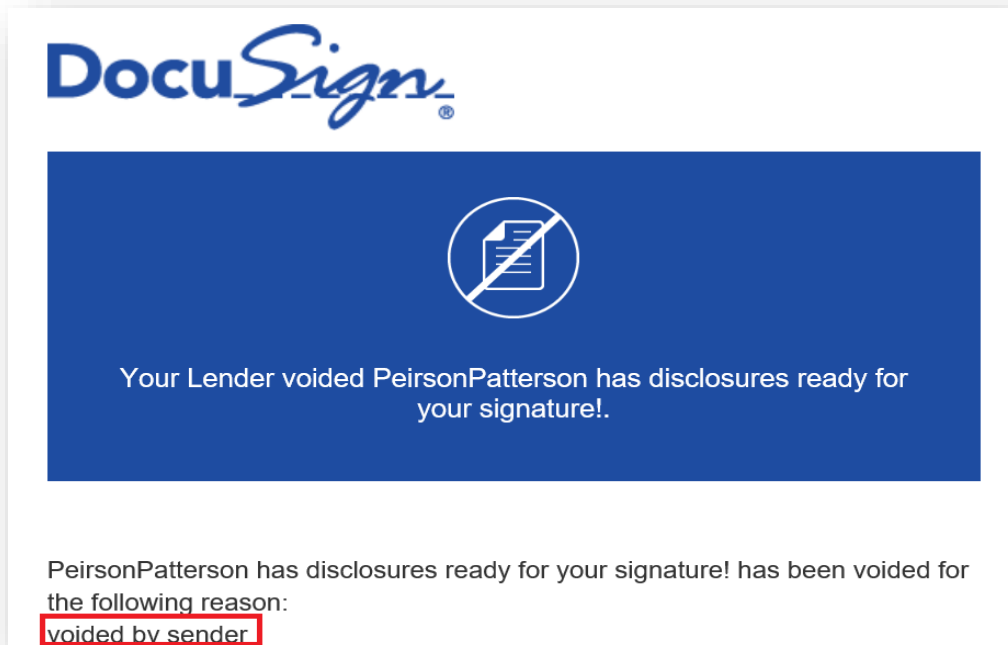
The status page has a **Preview** of the document(s), the **Loan Number**, the **Order Number** (for invoicing), the **Status** (at this point, it has been sent to the applicant), the **Last Update** to the eSign transaction, the **Signers** of the documents, and a visual of where the user is in the process (sent, delivered, and signed). There are links to **Abort** the transaction (only when *Sent* and *Delivered*) and to **View Package** and **View Certificate** (after it has been signed).

[illegible]

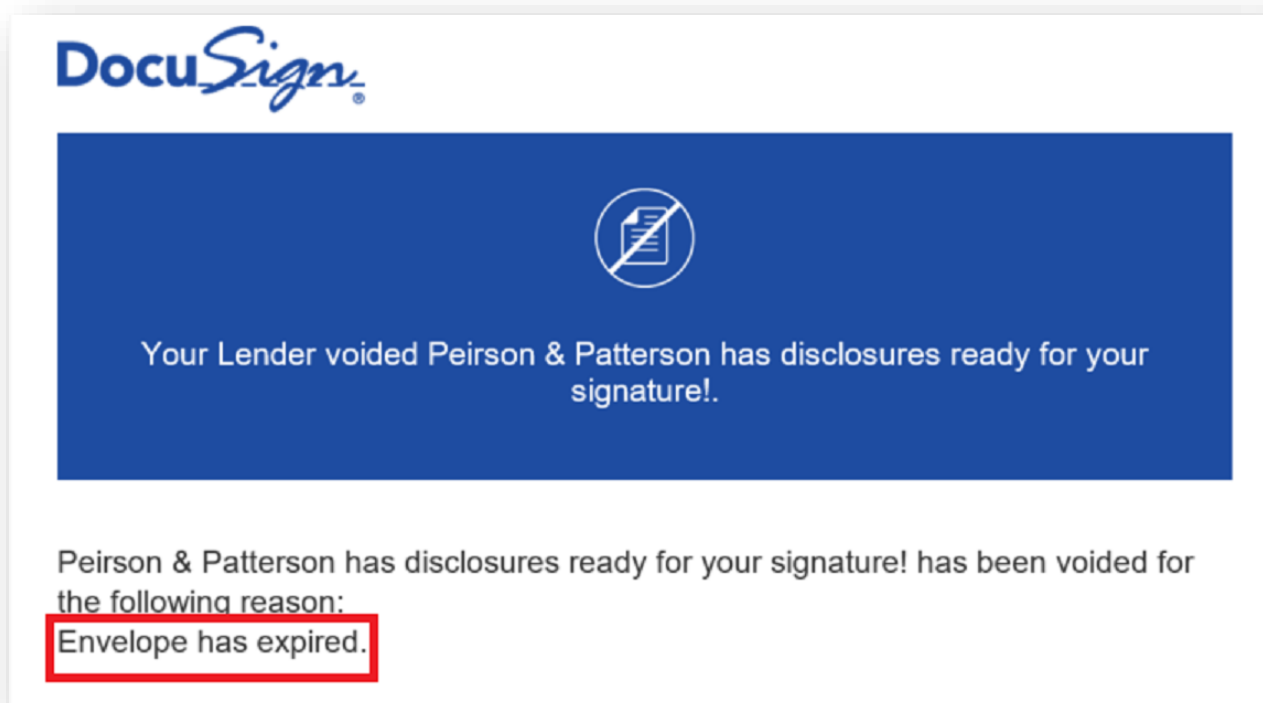
You can cancel the signing process by clicking **Abort (cannot undo)** in the bottom left hand corner. This link will only display if the document(s) is *Sent* or *Delivered*. Once the status is *Signed*, you will be unable to abort this process.

<p>Signers</p> <div> <div> John Doe applicantname1@gmail.com 123 </div> <div> ✓ Sent: 3/24/2016 1:41:30 PM </div> <div> Delivered: _____ </div> <div> Signed: _____ </div> </div>	
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DocuSign® will send the signer(s) an email with this message with an explanation on why the package has been voided.



If the documents have expired, a similar email will be sent to the signer(s), with a different reason for the voidance.



When the signer(s) opens and views the document(s), your **eSign Manager** and **eStatus** page will be updated to *Delivered*.

[Home](#) > [Account](#) > [eSign Manager](#)

ESIGN MANAGER

Filter: View:

Search:

NEW

Loan #	Signers	Submitted	Status
1234567 (Cloned)	John Doe [applicantname1@gmail.com]	3/24/2016 1:20:15 PM	Delivered

[Home](#) > [Account](#) > [eSign Manager](#) > [eSign Status](#)

Document Info

Loan Number:	1234567 (Cloned)
Order Number:	201603240210
Status:	Delivered
Last Update:	3/24/2016 2:37:03 PM

PersonPatterson		Age 10 and 12: Measures of antisocial behavior	
Learn's estimate		Learn's own (years)	
ADHD (1)	0.00	ADHD (1)	
ADHD (2)	0.00	ADHD (2)	
ADHD (3)	0.00	ADHD (3)	
ADHD (4)	0.00	ADHD (4)	
ADHD (5)	0.00	ADHD (5)	
ADHD (6)	0.00	ADHD (6)	
ADHD (7)	0.00	ADHD (7)	
ADHD (8)	0.00	ADHD (8)	
ADHD (9)	0.00	ADHD (9)	
ADHD (10)	0.00	ADHD (10)	
ADHD (11)	0.00	ADHD (11)	
ADHD (12)	0.00	ADHD (12)	
ADHD (13)	0.00	ADHD (13)	
ADHD (14)	0.00	ADHD (14)	
ADHD (15)	0.00	ADHD (15)	
ADHD (16)	0.00	ADHD (16)	
ADHD (17)	0.00	ADHD (17)	
ADHD (18)	0.00	ADHD (18)	
ADHD (19)	0.00	ADHD (19)	
ADHD (20)	0.00	ADHD (20)	
ADHD (21)	0.00	ADHD (21)	
ADHD (22)	0.00	ADHD (22)	
ADHD (23)	0.00	ADHD (23)	
ADHD (24)	0.00	ADHD (24)	
ADHD (25)	0.00	ADHD (25)	
ADHD (26)	0.00	ADHD (26)	
ADHD (27)	0.00	ADHD (27)	
ADHD (28)	0.00	ADHD (28)	
ADHD (29)	0.00	ADHD (29)	
ADHD (30)	0.00	ADHD (30)	
ADHD (31)	0.00	ADHD (31)	
ADHD (32)	0.00	ADHD (32)	
ADHD (33)	0.00	ADHD (33)	
ADHD (34)	0.00	ADHD (34)	
ADHD (35)	0.00	ADHD (35)	
ADHD (36)	0.00	ADHD (36)	
ADHD (37)	0.00	ADHD (37)	
ADHD (38)	0.00	ADHD (38)	
ADHD (39)	0.00	ADHD (39)	
ADHD (40)	0.00	ADHD (40)	
ADHD (41)	0.00	ADHD (41)	
ADHD (42)	0.00	ADHD (42)	
ADHD (43)	0.00	ADHD (43)	
ADHD (44)	0.00	ADHD (44)	
ADHD (45)	0.00	ADHD (45)	
ADHD (46)	0.00	ADHD (46)	
ADHD (47)	0.00	ADHD (47)	
ADHD (48)	0.00	ADHD (48)	
ADHD (49)	0.00	ADHD (49)	
ADHD (50)	0.00	ADHD (50)	
ADHD (51)	0.00	ADHD (51)	
ADHD (52)	0.00	ADHD (52)	
ADHD (53)	0.00	ADHD (53)	
ADHD (54)	0.00	ADHD (54)	
ADHD (55)	0.00	ADHD (55)	
ADHD (56)	0.00	ADHD (56)	
ADHD (57)	0.00	ADHD (57)	
ADHD (58)	0.00	ADHD (58)	
ADHD (59)	0.00	ADHD (59)	
ADHD (60)	0.00	ADHD (60)	
ADHD (61)	0.00	ADHD (61)	
ADHD (62)	0.00	ADHD (62)	
ADHD (63)	0.00	ADHD (63)	
ADHD (64)	0.00	ADHD (64)	
ADHD (65)	0.00	ADHD (65)	
ADHD (66)	0.00	ADHD (66)	
ADHD (67)	0.00	ADHD (67)	
ADHD (68)	0.00	ADHD (68)	
ADHD (69)	0.00	ADHD (69)	
ADHD (70)	0.00	ADHD (70)	
ADHD (71)	0.00	ADHD (71)	
ADHD (72)	0.00	ADHD (72)	
ADHD (73)	0.00	ADHD (73)	
ADHD (74)	0.00	ADHD (74)	
ADHD (75)	0.00	ADHD (75)	
ADHD (76)	0.00	ADHD (76)	
ADHD (77)	0.00	ADHD (77)	
ADHD (78)	0.00	ADHD (78)	
ADHD (79)	0.00	ADHD (79)	
ADHD (80)	0.00	ADHD (80)	
ADHD (81)	0.00	ADHD (81)	
ADHD (82)	0.00	ADHD (82)	
ADHD (83)	0.00	ADHD (83)	
ADHD (84)	0.00	ADHD (84)	
ADHD (85)	0.00	ADHD (85)	
ADHD (86)	0.00	ADHD (86)	
ADHD (87)	0.00	ADHD (87)	
ADHD (88)	0.00	ADHD (88)	
ADHD (89)	0.00	ADHD (89)	
ADHD (90)	0.00	ADHD (90)	
ADHD (91)	0.00	ADHD (91)	
ADHD (92)	0.00	ADHD (92)	
ADHD (93)	0.00	ADHD (93)	
ADHD (94)	0.00	ADHD (94)	
ADHD (95)	0.00	ADHD (95)	
ADHD (96)	0.00	ADHD (

Signers

John Doe <i>applicantname1@gmail.com</i> 123	Sent: 3/24/2016 1:41:30 PM	Delivered: 3/24/2016 2:36:42 PM	Signed: _____
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⏮ Abort (cannot undo)

When the signer(s) have signed and sent the package, your status will update to *Completed* on the **eSign Manager** page and on the **eStatus** as *Signed*.

Home > Account > eSign Manager			
ESIGN MANAGER			
Filter: <input type="text"/> View: <input type="text"/>		Search: <input type="text"/>	<input type="button" value="NEW"/>
Loan #	Signers	Submitted	Status
1234567 (Cloned)	John Doe [applicantname1@gmail.com]	3/24/2016 1:20:15 PM	Completed

Notice **View Package** and **View Certificate** links appear at the bottom left-hand corner. **View Package** allows you to view the signed package. **View Certificate** details the activity of the entire signing process such as timestamps for both the signer(s) and lender.

Home > Account > eSign Manager > eSign Status


Document Info


Loan Number:	1234567 (Cloned)
Order Number:	201603240210
Status:	Completed
Last Update:	3/24/2016 2:59:32 PM

A screenshot of a loan estimate document. The header includes the name 'Person Patterson' and a date '3/24/2016'. The document is divided into sections: 'Loan Estimate', 'Loan Details', 'Loan Terms', 'Loan Costs', 'Loan Payments', 'Loan History', and 'Loan Status'. It contains various fields for loan information, including loan number, interest rate, loan term, and loan balance. There are also sections for 'Loan Costs' and 'Loan Payments' with tables showing monthly payments and total costs. The document is signed by 'Person Patterson' on '3/24/2016'.

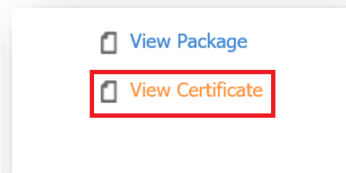
Signers

John Doe applicantname1@gmail.com 123	✓ Sent: 3/24/2016 1:41:30 PM	✓ Delivered: 3/24/2016 2:36:42 PM	✓ Signed: 3/24/2016 2:59:08 PM
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 [View Package](#)

 [View Certificate](#)

To view a detailed process on the entire DocuSign process choose **View Certificate**.



A copy of the Certificate will appear in a different window.

Certificate Of Completion		
Envelope Id: E1260233BE5F41EAB7652F27DFC39581		Status: Completed
Subject: PeirsonPatterson has disclosures ready for your signature!		
Source Envelope:		
Document Pages: 60	Signatures: 10	Envelope Originator:
Certificate Pages: 4	Initials: 0	Your Lender
AutoNav: Enabled		2310 W interstate 20, Suite 100
EnvelopeId Stamping: Enabled		Arlington, TX 76017
Time Zone: (UTC-06:00) Central Time (US & Canada)		jerry@ppdocs.com
		IP Address: [REDACTED]
Record Tracking		
Status: Original	Holder: Your Lender	Location: DocuSign
3/24/2016 1:20:13 PM	jerry@ppdocs.com	
Signer Events	Signature	Timestamp
John Doe	DocuSigned by:  1F675B629EB9424...	Sent: 3/24/2016 1:41:30 PM
applicantname1@gmail.com		Viewed: 3/24/2016 2:36:42 PM
Security Level: Email, Account Authentication (None), Access Code	Using IP Address: [REDACTED]	Signed: 3/24/2016 2:59:08 PM
Electronic Record and Signature Disclosure: Accepted: 3/24/2016 2:58:36 PM ID: 1e743255-f83f-42b4-acb8-58377a35eb73		
In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Ebony Jackson	<div>COPIED</div>	Sent: 3/24/2016 1:41:31 PM
ebony@ppdocs.com		
Security Level: Email, Account Authentication (None)		
Electronic Record and Signature Disclosure: Accepted: 3/21/2016 10:08:50 AM ID: d6360323-06a4-4d3c-9f12-c9328dbd1f35		
Notary Events		Timestamp
Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	3/24/2016 1:41:31 PM
Certified Delivered	Security Checked	3/24/2016 2:36:43 PM
Signing Complete	Security Checked	3/24/2016 2:59:08 PM
Completed	Security Checked	3/24/2016 2:59:08 PM
Electronic Record and Signature Disclosure		