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.

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.*)

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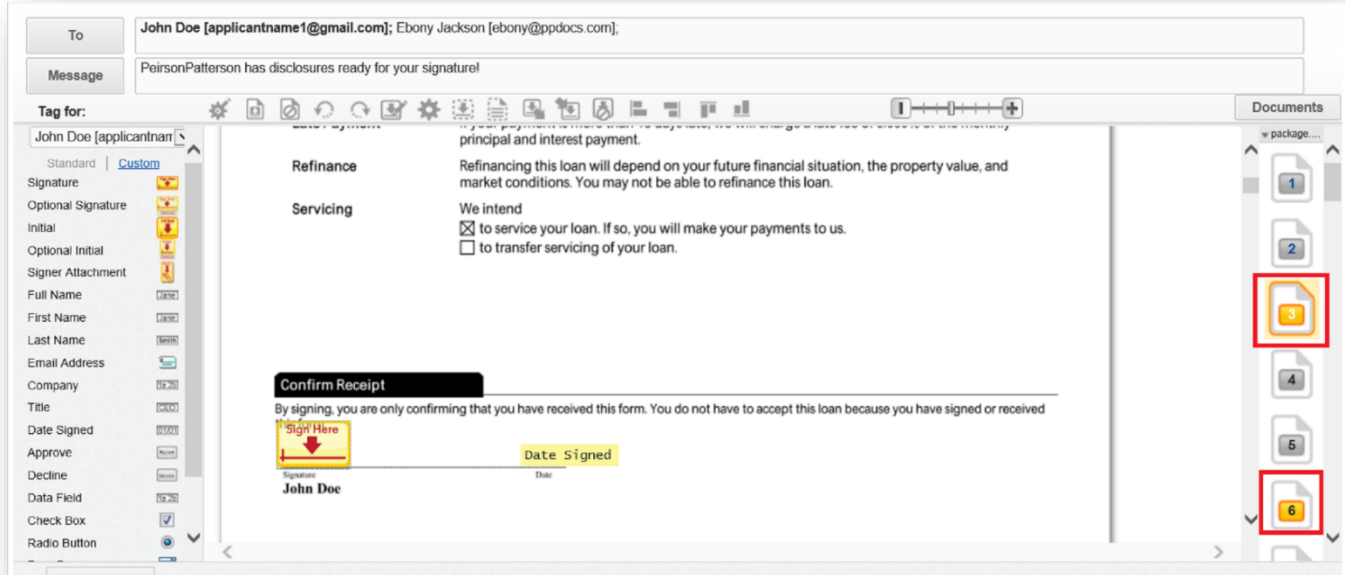
You can make changes to the document's Signature placeholders by clicking the **Sign Here** placeholder. Three icons will now be shown an **anchor** to keep the Signature object in its place**,** a **gear** for the settings of the Signature placeholder, and an **X** to delete the signature object.

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**.

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

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).

As a lender you will be carbon copied a copy of the documents. DocuSign® will email you with this message below.
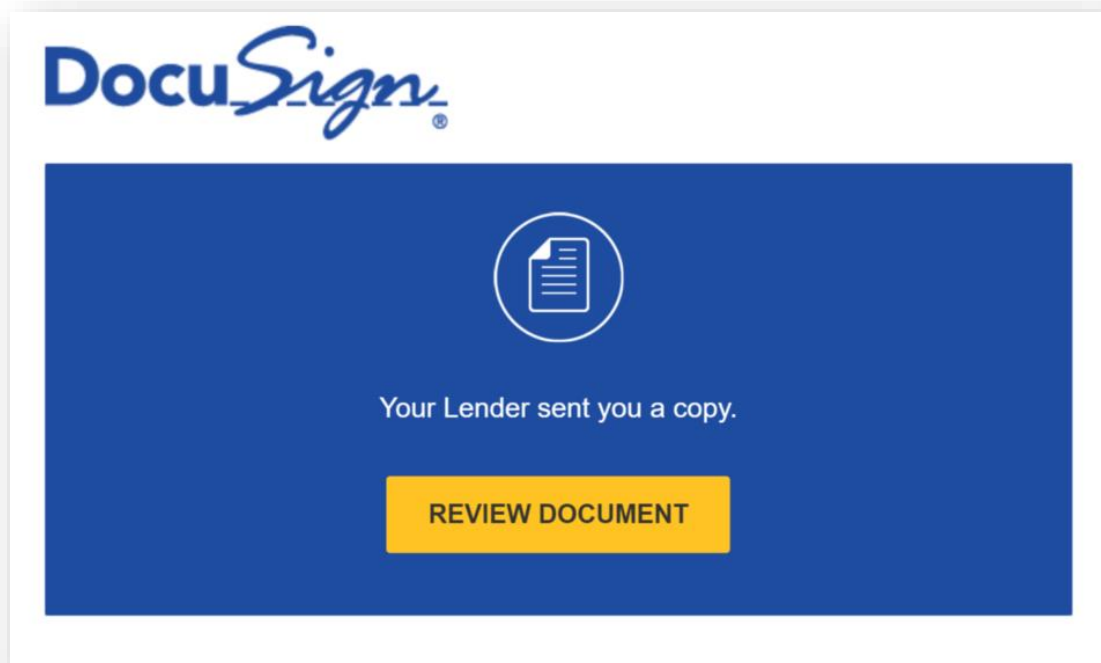
To view the status of your documents login to your account and choose **eSign Manager** under **eDisclosures (e-Sign).**

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

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).


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.

DocuSign® will send the signer(s) an email with this message with an explanation on why the package has been voided.
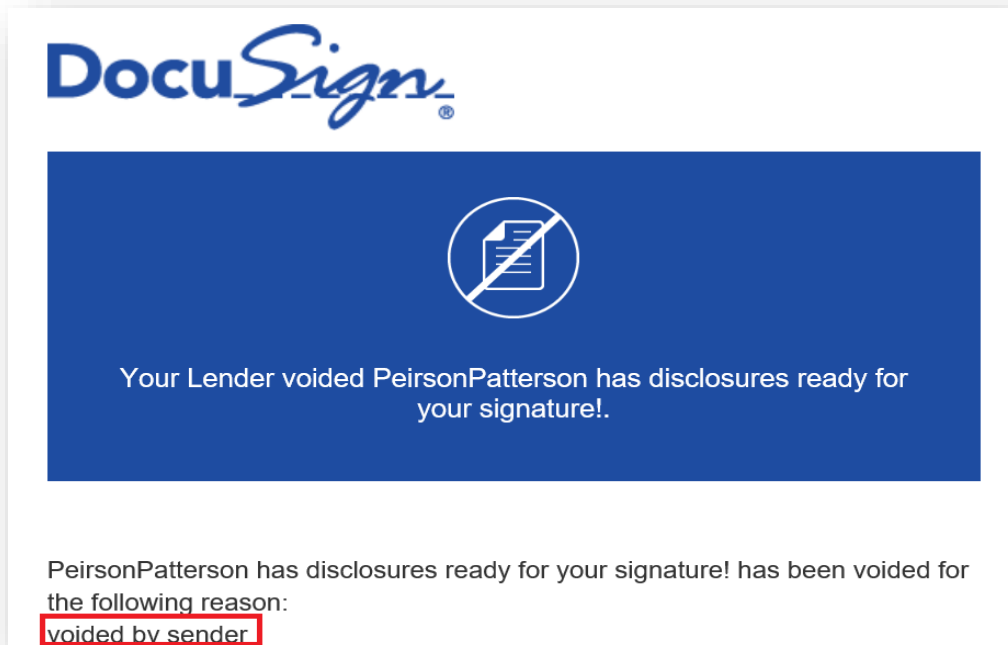
If the documents have expired, a similar email will be sent to the signer(s), with a different reason for the voidance.
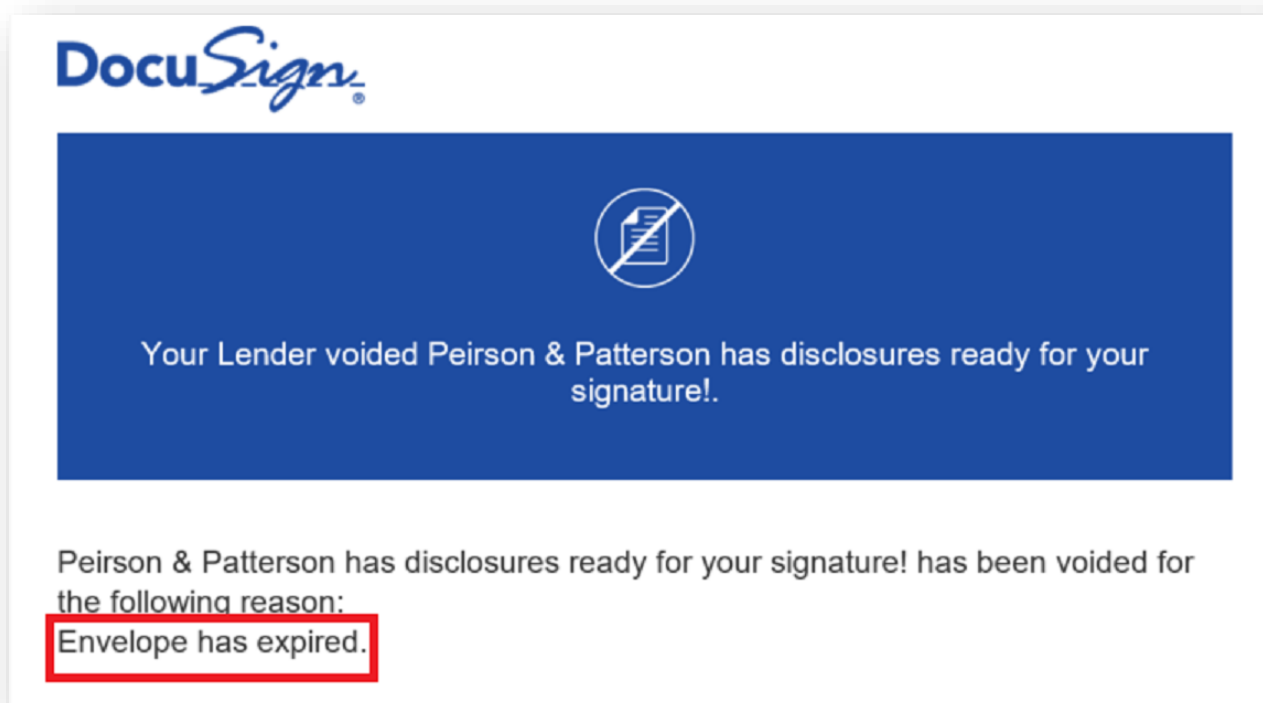
When the signer(s) opens and views the document(s), your **eSign Manager** and **eStatus** page will be updated to *Delivered*.

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*.

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.

To view a detailed process on the entire DocuSign process choose **View Certificate.**
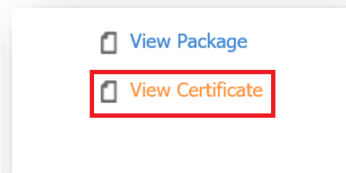
A copy of the Certificate will appear in a different window.

Certificate Of Completion

Envelope Id: E1260233BE5F41EAB7652F27DFC39581
Subject: PeirsonPatterson has disclosures ready for your signature!
Source Envelope:
Document Pages: 60
Certificate Pages: 4
AutoNav: Enabled
EnvelopeId Stamping: Enabled
Time Zone: (UTC-06:00) Central Time (US & Canada)

Signatures: 10
Initials: 0

Status: Completed

Envelope Originator:
Your Lender
2310 W interstate 20, Suite 100
Arlington, TX 76017
jerry@ppdocs.com
IP Address:

Record Tracking

Status: Original
        3/24/2016 1:20:13 PM

Holder: Your Lender
        jerry@ppdocs.com

Location: DocuSign

Signer Events	Signature	Timestamp
John Doe applicantname1@gmail.com Security Level: Email, Account Authentication (None), Access Code	DocuSigned by: *John Doe* 1F675B629EB9424... Using IP Address:	Sent: 3/24/2016 1:41:30 PM Viewed: 3/24/2016 2:36:42 PM 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 ebony@ppdocs.com Security Level: Email, Account Authentication (None)	**COPIED**	Sent: 3/24/2016 1:41:31 PM

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