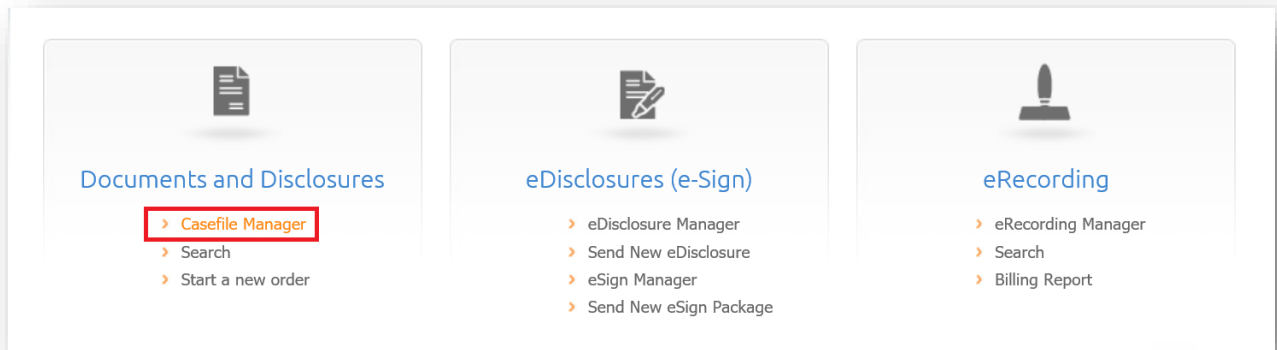


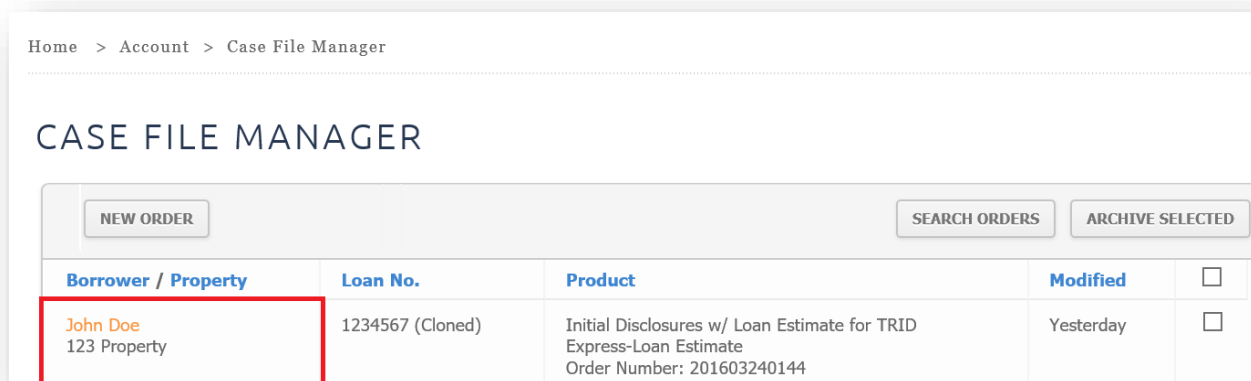
## Send a Package: Case File Manager

The service fee to electronically disclose and sign document(s) that PPDocs generates will be \$3 per transaction effective April 15<sup>th</sup> 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 1<sup>st</sup> 2016.

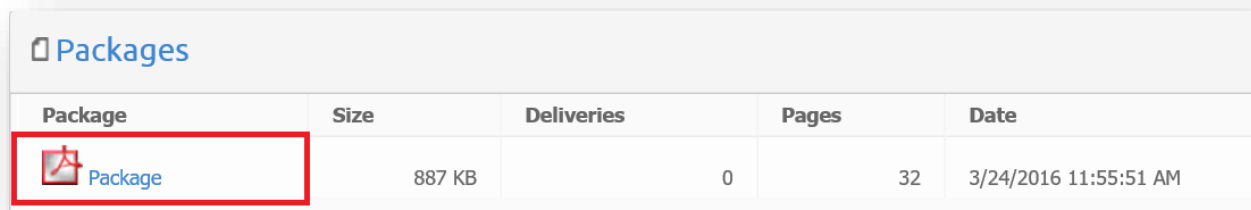
Under **Documents and Disclosures** click **Casefile Manager**.



Select the case you would like to send.



Underneath the **Packages** menu select a **package**.



Next, in the **Electronic Disclosures** section, click the **New eSign Request** link.

<b>Electronic Disclosures</b>	<b>(New eSign Request)</b>	(eSign Manager)	(New eDisclosure - Click Sign)	(eDisclosure Manager)		
Loan Number	Destination	Submitted	Authenticated	Consented	Viewed	Signed
No eDisclosures.						

The **Loan #**, **Sender's Email**, **Sender's Name**, **Subject**, **Expires in** and **Signers Name** are automatically filled in. You can edit these fields. Enter the **Signer(s)** email destinations for the documents. You must have at least one email address. If you are sending multiple recipients to one email address, put that email address in each signer's email field. DocuSign® will generate emails on your behalf and send them to the applicant at the given email address (es). You can also specify an **Access Code** for extra protection. **It is not mandatory. Note:** *For security purposes the lender must send the applicant a separate email containing the **Access Code**.*

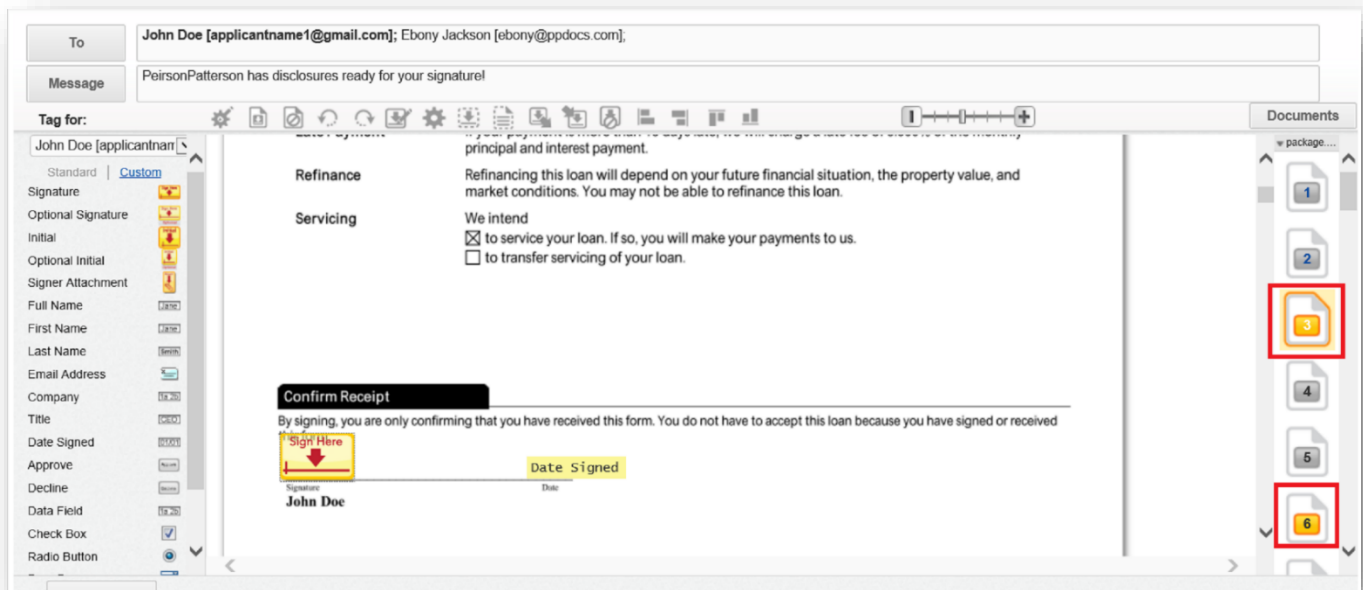
### Send Documents via DocuSign® to...

Incurrs a Service Fee of: **\$3.00**

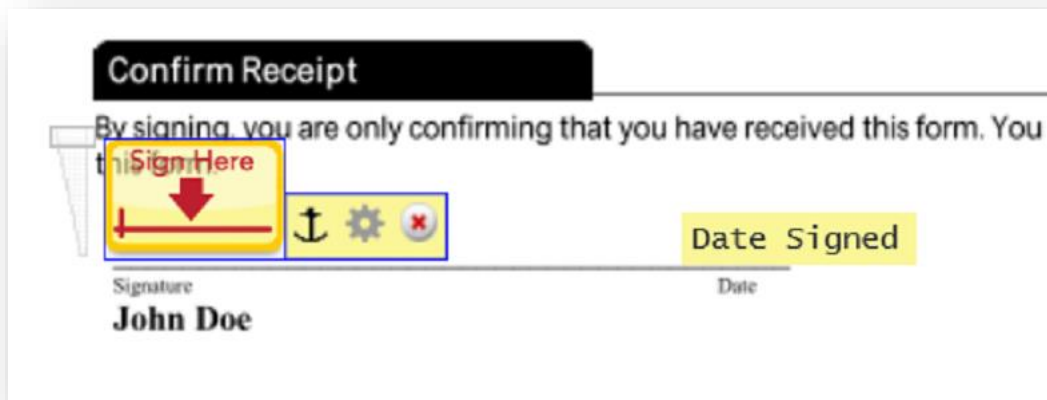
Loan #:	1234567 (Cloned)																																														
Sender's Email:	LenderName1@ppdocs.com																																														
Sender's Name:	Lender Name																																														
Subject:	PeirsonPatterson has disclosures ready for your signature!																																														
Expires in:	3 (days)																																														
Signers:	<table><thead><tr><th></th><th>Name</th><th>Email</th><th>Access Code</th></tr></thead><tbody><tr><td>1.</td><td>John Doe</td><td>applicantname1@gmail.com</td><td>123</td></tr><tr><td>2.</td><td></td><td></td><td></td></tr><tr><td>3.</td><td></td><td></td><td></td></tr><tr><td>4.</td><td></td><td></td><td></td></tr><tr><td>5.</td><td></td><td></td><td></td></tr><tr><td>6.</td><td></td><td></td><td></td></tr><tr><td>7.</td><td></td><td></td><td></td></tr><tr><td>8.</td><td></td><td></td><td></td></tr><tr><td>9.</td><td></td><td></td><td></td></tr><tr><td>10.</td><td></td><td></td><td></td></tr></tbody></table>		Name	Email	Access Code	1.	John Doe	applicantname1@gmail.com	123	2.				3.				4.				5.				6.				7.				8.				9.				10.					
	Name	Email	Access Code																																												
1.	John Doe	applicantname1@gmail.com	123																																												
2.																																															
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**Send Disclosures** >

You will be redirected to DocuSign® where Signature objects will be automatically placed where Signatures are required. The highlighted pages on the right tell which pages require a signature.



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 click **Send**.

The screenshot displays a document editing interface. On the left, a 'Tag for:' menu is open, showing a list of tags under 'Standard' and 'Custom' tabs. The 'Signature' tag is highlighted with a red box. Other tags include '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', and 'Radio Button'. Each tag has a corresponding icon. The central area shows a document preview with a 'Confirm Receipt' section. A blue box highlights the text 'John Doe' in this section. Below it, a yellow box with a red arrow and the text 'Sign Here' is positioned over a signature line. The signature line is labeled 'Signature' and 'John Doe'. To the right of the signature line is a 'Date Signed' field. The bottom navigation bar contains a 'Send' button (highlighted with a red box), 'Preview', '<Go Back', 'Save Draft', and 'Discard Changes'.

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

Confirm Receipt

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

Sign Here

Signature

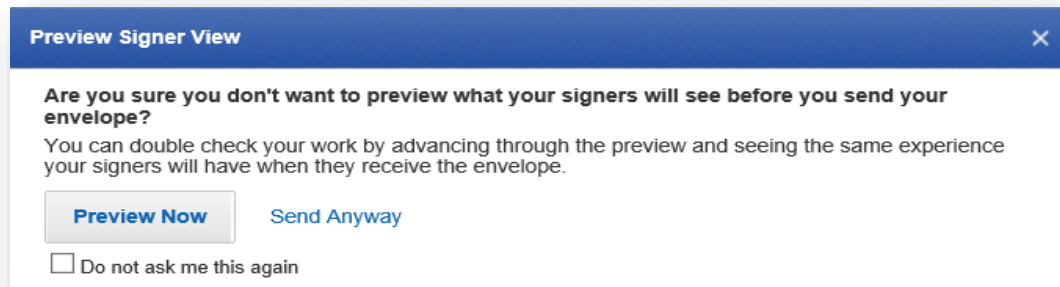
John Doe

Date Signed

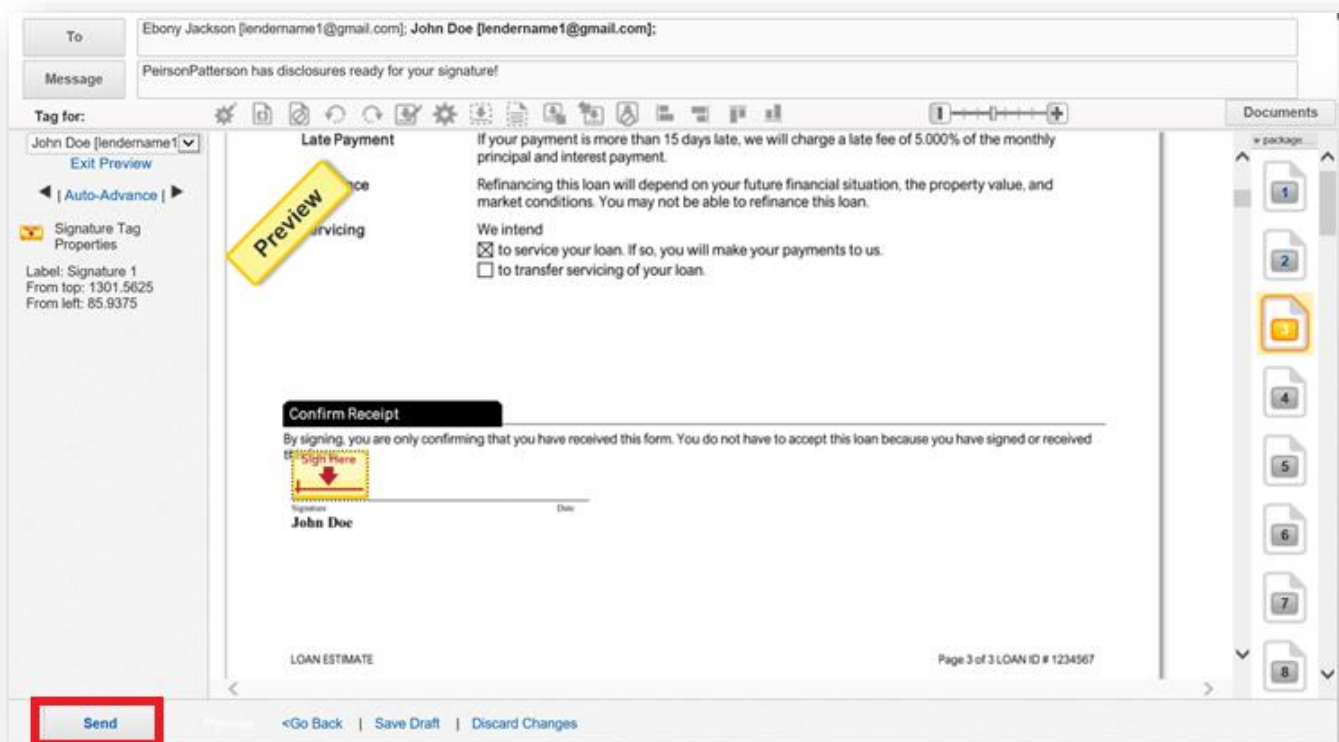
Send

Preview <Go Back | Save Draft | Discard Changes

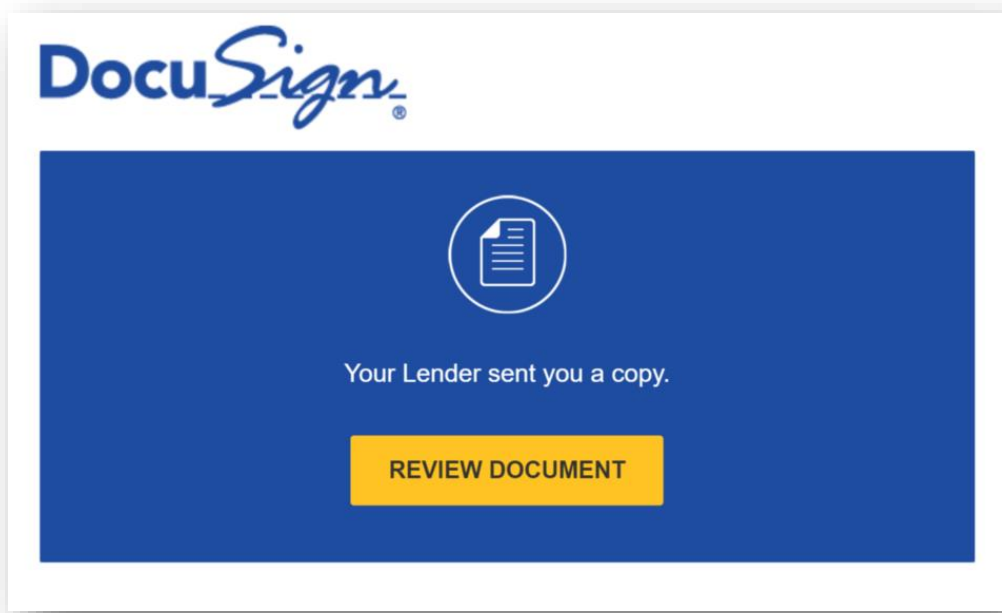
A pop-up window will ask if you would like to preview the applicant's perspective of the sent document(s). If you do not wish to preview, you can click the **Send Anyway**, to send the document(s) without viewing the applicant's perspective



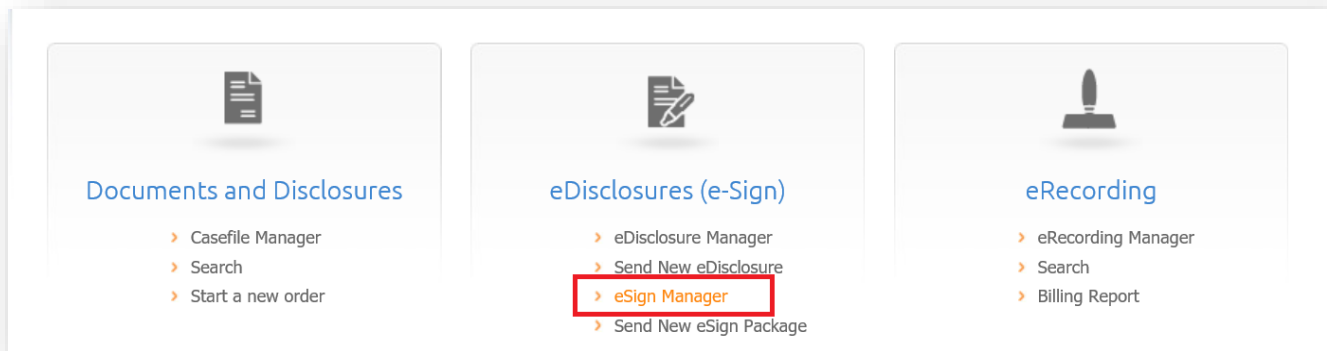
If you do choose to **Preview Now**, it will show the applicant's perspective of the document(s). Click **Send** to send the document(s) to the signer(s).



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*. 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, 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 is *Sent* or *Delivered*. Once the status is *Signed*, you will be unable to abort this process.

Signers				
John Doe applicantname1@gmail.com 123	✓ Sent: 3/24/2016 1:41:30 PM	Delivered: _____	Signed: _____	

DocuSign® will send the signer(s) an email with an explanation on why the package has been voided.



Your Lender voided PeirsonPatterson has disclosures ready for your signature!.

PeirsonPatterson has disclosures ready for your signature! has been voided for the following reason:

voided by sender

If the document(s) has expired a similar email will be sent to the signer(s), with a different explanation.



Your Lender voided Peirson & Patterson has disclosures ready for your signature!.

Peirson & Patterson has disclosures ready for your signature! has been voided for the following reason:

Envelope has expired.



When the signer opens and views the document, your **eSign Manager** and **eSign Status** page will be updated to *Delivered*.

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

## DESIGN 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

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

[illegible]

## Signers

<b>John Doe</b> <i>applicantname1@gmail.com</i> 123	 <b>Sent:</b> 3/24/2016 1:41:30 PM	 <b>Delivered:</b> 3/24/2016 2:36:42 PM	<b>Signed:</b> _____
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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 **eSign Status** as *Signed*.

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	Completed

Notice **View Package** and **View Certificate** links near 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

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

**Loan Estimate**

**Loan Details**

**Origination Fees**

**Prepayment Penalties**

**Other Fees**

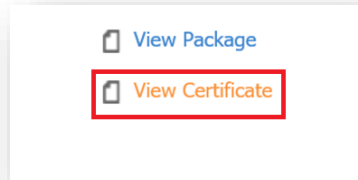
**Summary**

## Signers



<b>John Doe</b> applicantname1@gmail.com 123	<b>✓ Sent:</b> 3/24/2016 1:41:30 PM	<b>✓ Delivered:</b> 3/24/2016 2:36:42 PM	<b>✓ Signed:</b> 3/24/2016 2:59:08 PM
--	--	---	--

[View Package](#)  
[View Certificate](#)

To view the detailed log of the entire DocuSign® process, choose **View Certificate**. This will give you the most complete details of the transaction from DocuSign® including the signing log, IP addresses, and evidence of completion.



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 applicantname1@gmail.com Security Level: Email, Account Authentication (None), Access Code	 DocuSigned by: John Doe 1F675B629EB9424...	Sent: 3/24/2016 1:41:30 PM Viewed: 3/24/2016 2:36:42 PM Signed: 3/24/2016 2:59:08 PM
Using IP Address: [REDACTED]		
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) Electronic Record and Signature Disclosure: Accepted: 3/21/2016 10:08:50 AM ID: d6360323-06a4-4d3c-9f12-c9328dbd1f35		Sent: 3/24/2016 1:41:31 PM
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