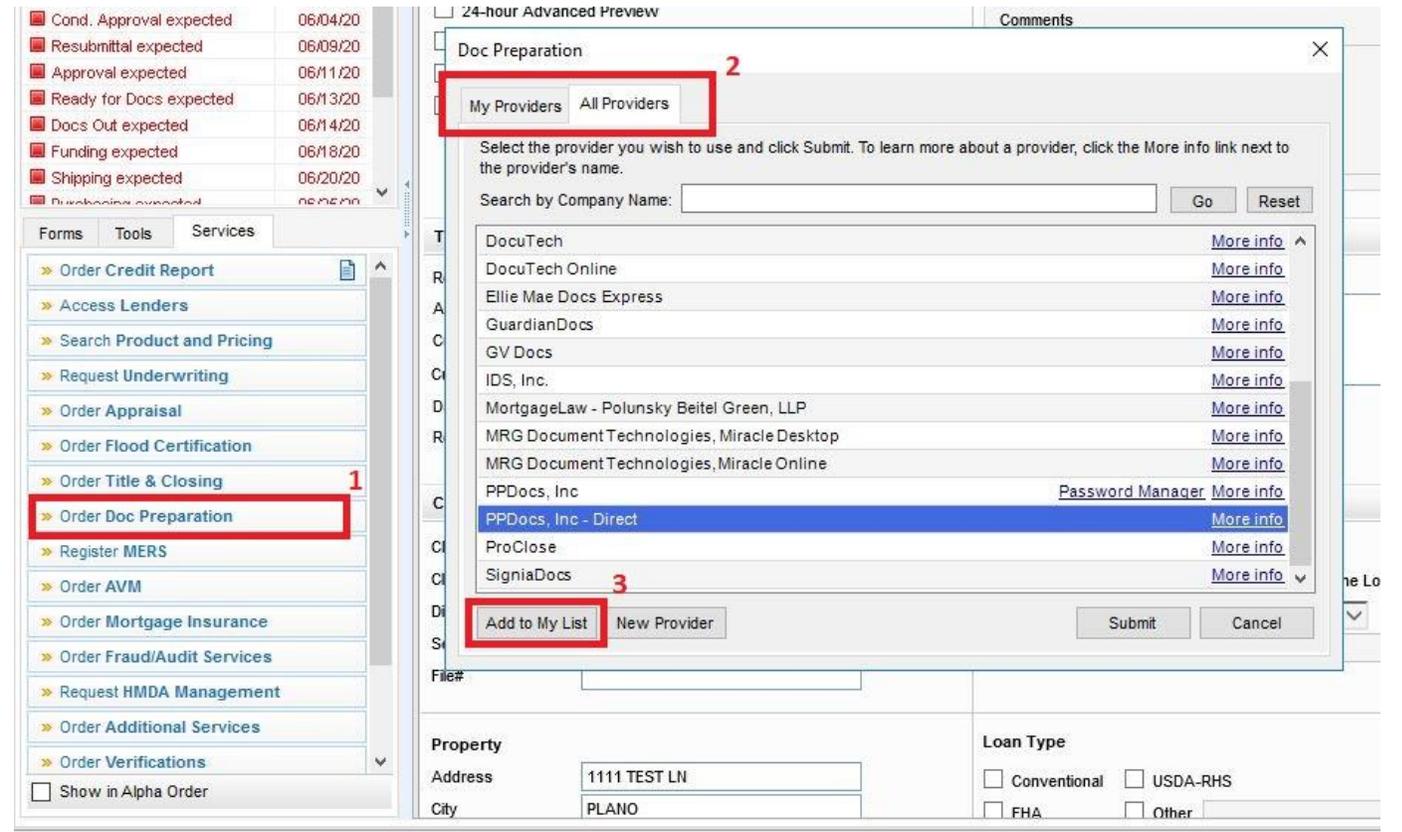


Introducing the new PPDocs integration

**Encompass**<sup>®</sup>  
by EllieMae<sup>®</sup>

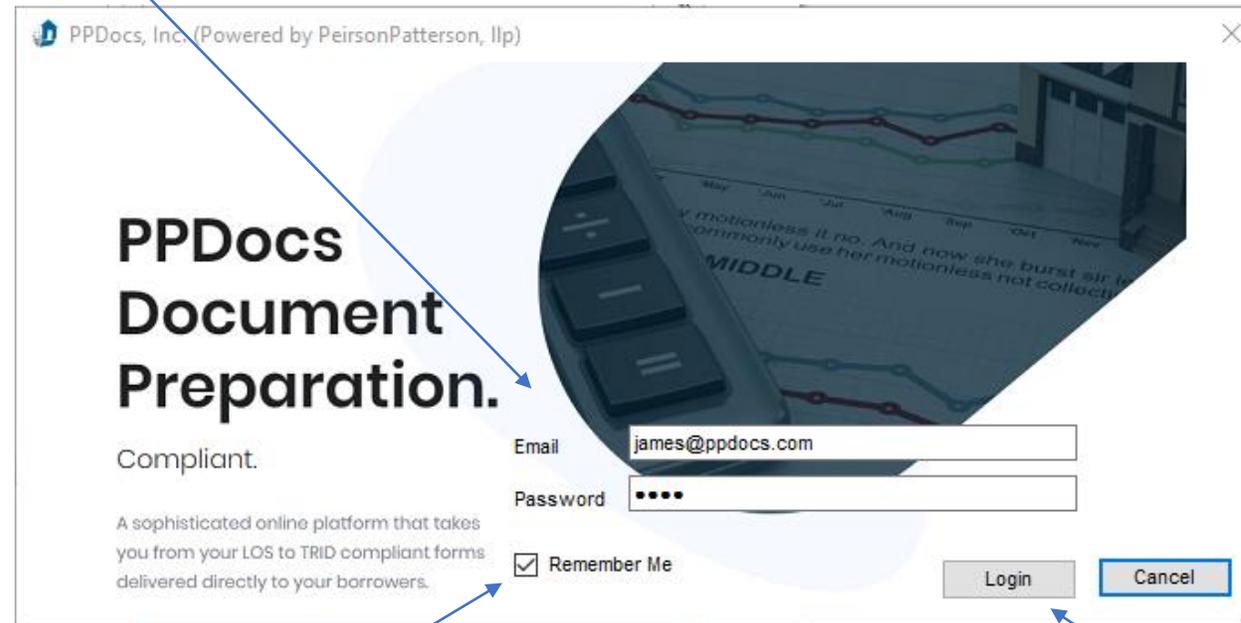


1. In the Services tab, select “Order Doc Preparation”
2. You will find the new PPDocs, Inc – Direct integration in the All Providers tab
3. Select the “Add to My List” button so PPDocs will be available on your My Providers tab every time you order doc prep going forward



The screenshot displays the PPDocs, Inc. interface. On the left, the 'Services' tab is active, and 'Order Doc Preparation' is highlighted with a red box and the number 1. On the right, the '24-hour Advanced Preview' window is open, showing the 'All Providers' tab selected with a red box and the number 2. The provider list includes 'PPDocs, Inc - Direct', which is highlighted in blue. Below the list, the 'Add to My List' button is highlighted with a red box and the number 3. The 'Property' section shows the address '1111 TEST LN' and 'PLANO'. The 'Loan Type' section has checkboxes for 'Conventional', 'USDA-RHS', 'FHA', and 'Other'.

Enter your credentials



PPDocs, Inc. (Powered by PeirsonPatterson, llp)

# PPDocs Document Preparation.

Compliant.

A sophisticated online platform that takes you from your LOS to TRID compliant forms delivered directly to your borrowers.

Email

Password

Remember Me

Login Cancel

Select the checkbox so your information will be saved!

Login to proceed!

## Closing Documents

Full residential closing package for loan programs in any of the 50 states.

## Legal Review

Review of submitted legal documents to ensure enforceability and/or compliance with applicable state law.

Residential Mortgage

Conventional, FHA, VA or USDA mortgage documents

Closing Disclosure Only

TRID compliant Closing Disclosure. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, broker disclosures

Texas Home Equity

Closed-end Texas home equity loan documents

\*Additional packages are available upon request

## Full Service TRID loans

PPDocs, Inc. will perform quality control of data based on the information entered on these order forms. We will select required documents as well as review title commitment and survey

## Full Service with hybrid eClose

Full service but with the package split between ancillary documents permitted to be signed electronically and documents needing to be wet signed by the borrower including the note, deed, and other recordable documents

## Direct Service

Bypass our order form and get docs immediately or submit directly to our doc prep team

\*Options vary according to package type selected

## Select Product

- *Order Closing Documents or upload your documents for Attorney Review*

## Select Package

- *Package options range from a standard Residential Mortgage to Texas Home Equity and other unique loan types. These options can be customized based on the lender's needs.*

## Service Type

- *Select a Direct order or a Full Service order with or without an eHybrid closing*

## Bypass Order Form

- *Selecting "Yes" will allow you to bypass the order form\**  
*\*some products may require the order form (i.e. construction)*

## Select Profile

- *Choose your pre-filled profile options*  
*\* profiles can be managed here -*

<https://www.ppdocs.com/OnlineSite/Setup/Profiles.aspx>

## Select Setup

- *Choose your pre-filled lender setup*  
*\* setups can be managed here -*

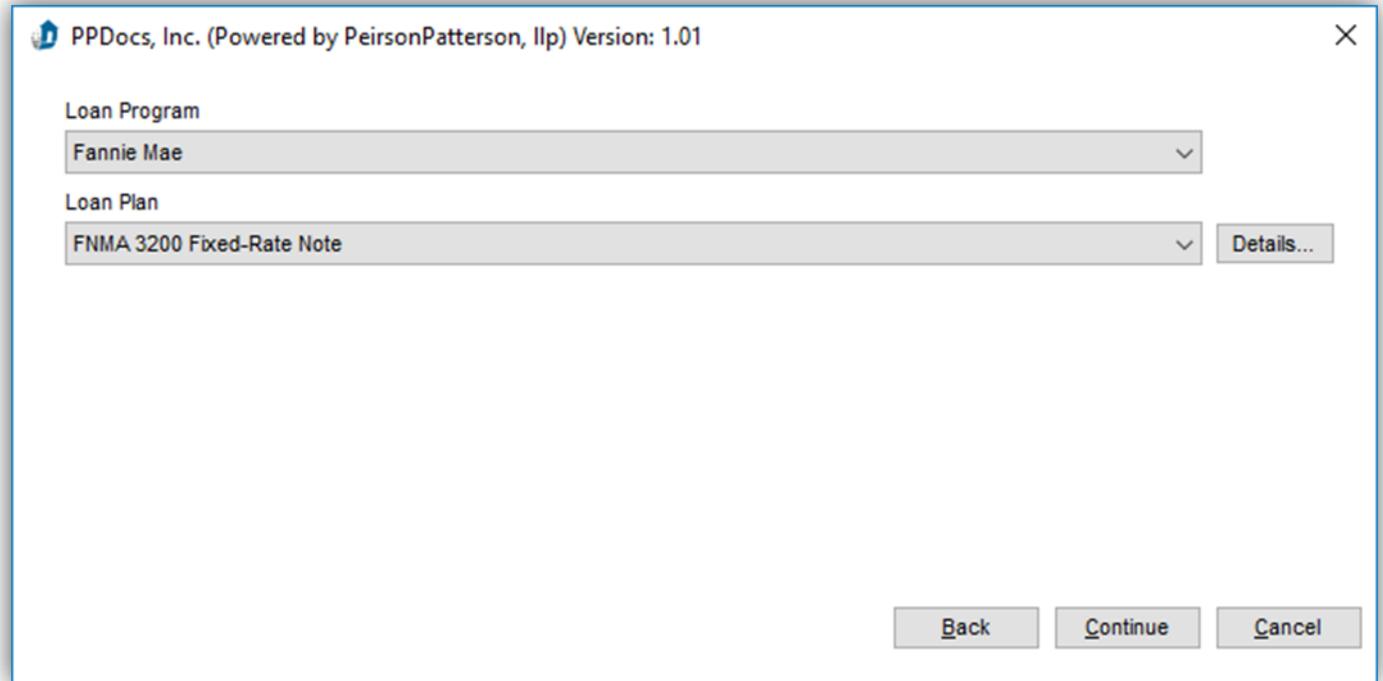
<https://www.ppdocs.com/OnlineSite/Setup/LenderSetups.aspx>

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Select Product	Closing Documents
Select Package	Residential Mortgage
Service Type	Full Svc.-Conventional, FHA, or VA Package (1st or 2nd Lien) - TRID
Bypass Order Form	Yes - Skip the order form and go directly to submit order
Select Profile	Default
Select Setup	Default Setup

## Confirm the Loan Program & Loan Plan

*Note: Options will be filtered based on key data in Encompass and plans selected at the time of setup/onboarding.*



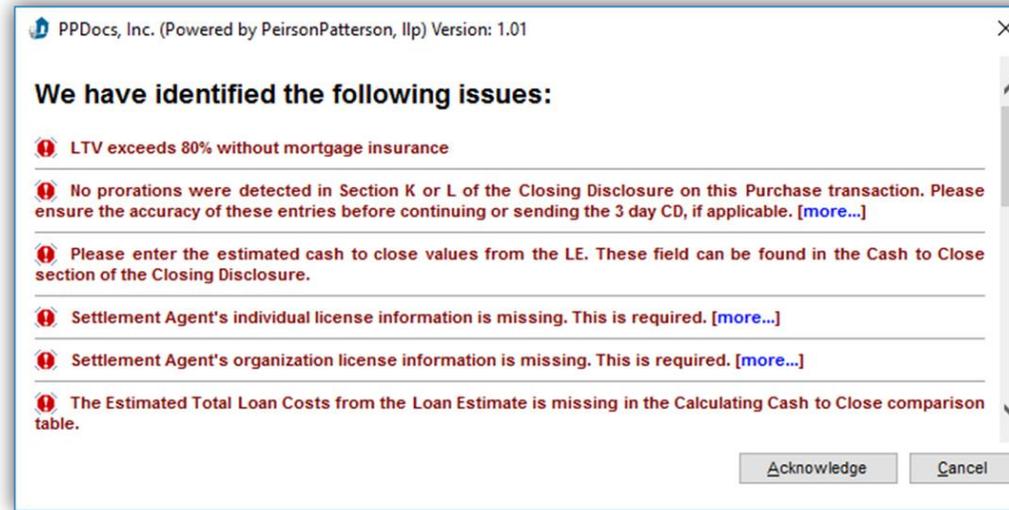
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Loan Program  
Fannie Mae

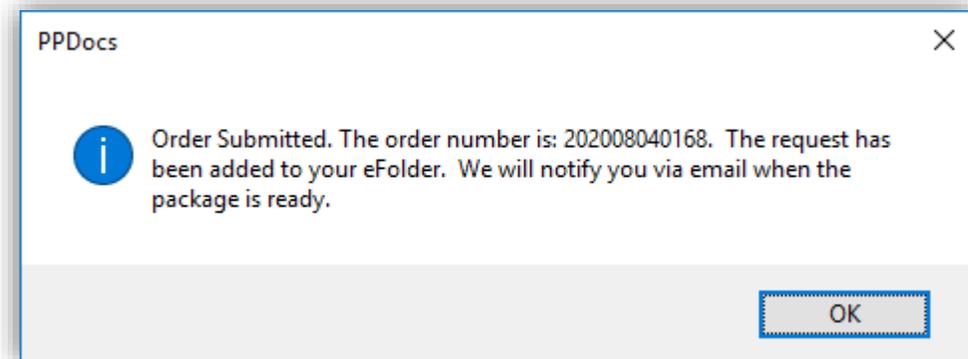
Loan Plan  
FNMA 3200 Fixed-Rate Note Details...

Back Continue Cancel

Correct any audit errors or click  
Acknowledge



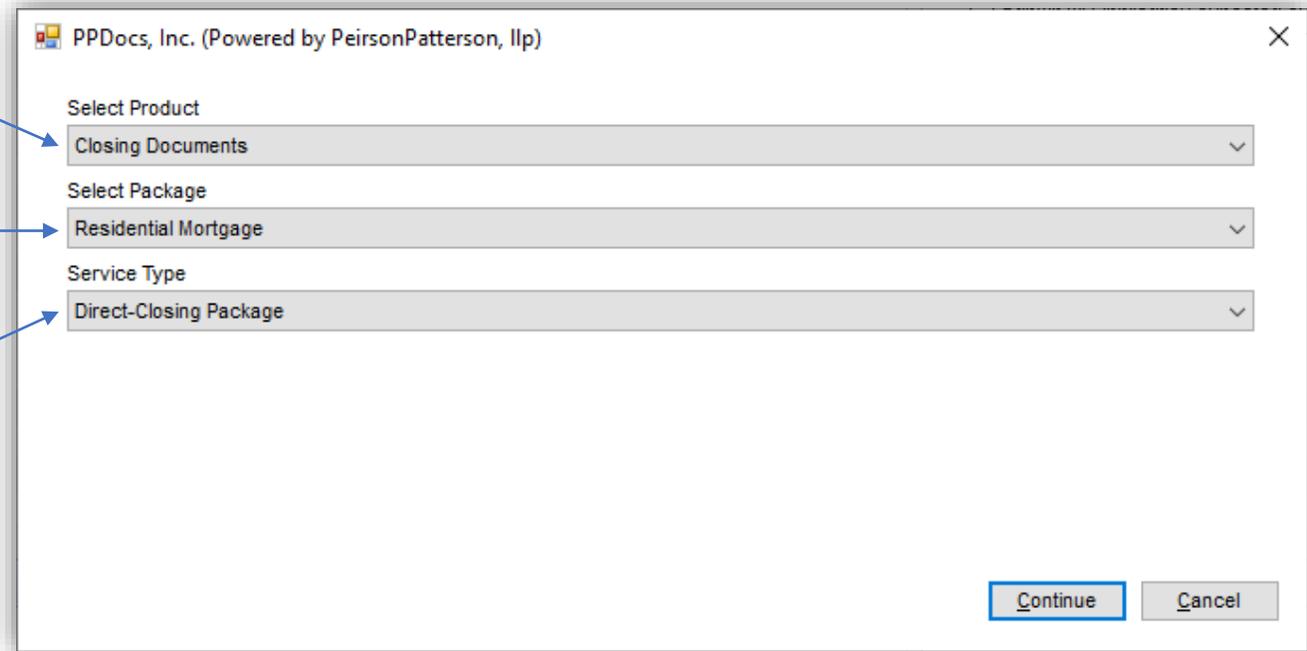
You will receive a confirmation  
with an order number and an  
email notification when your  
documents are ready to retrieve  
in the eFolder



Select the Product Type

Select the Package Type

Select the Service Type



PPDocs, Inc. (Powered by PeirsonPatterson, LLP)

Select Product  
Closing Documents

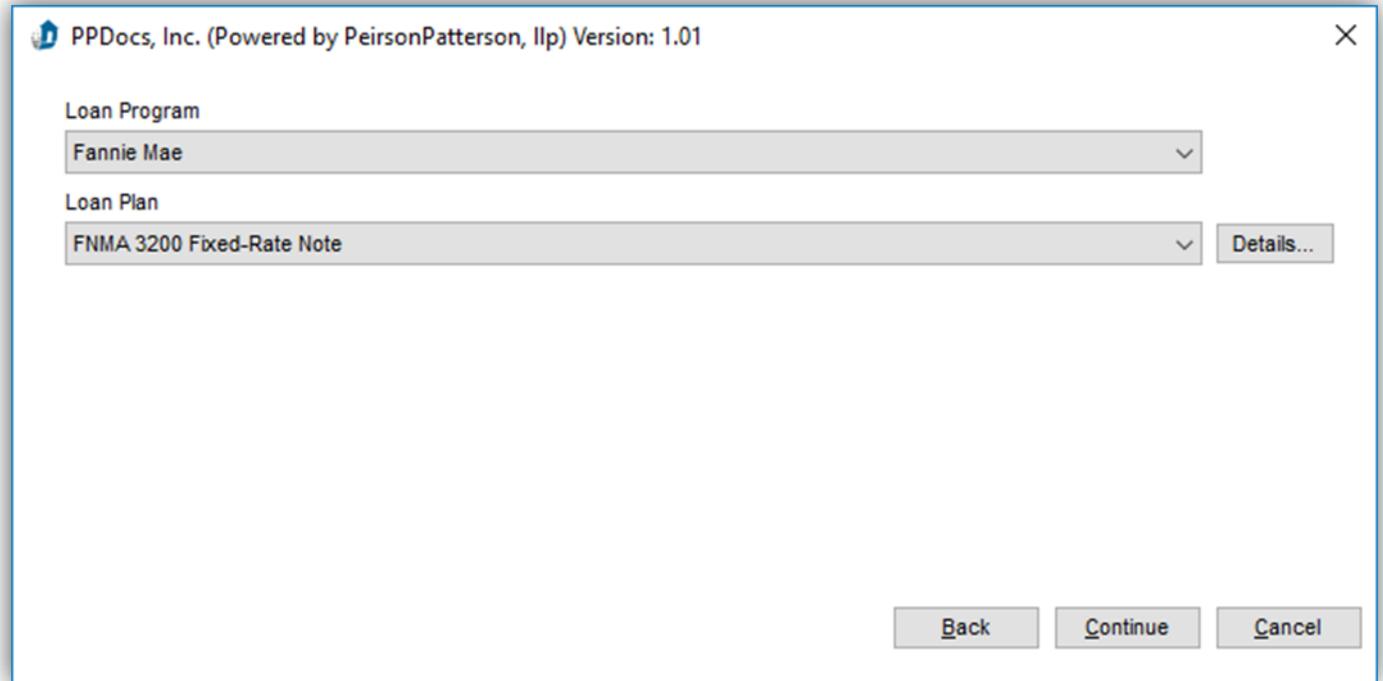
Select Package  
Residential Mortgage

Service Type  
Direct-Closing Package

Continue Cancel

## Confirm the Loan Program & Loan Plan

*Note: Options will be filtered based on key data in Encompass and plans selected at the time of setup/onboarding.*



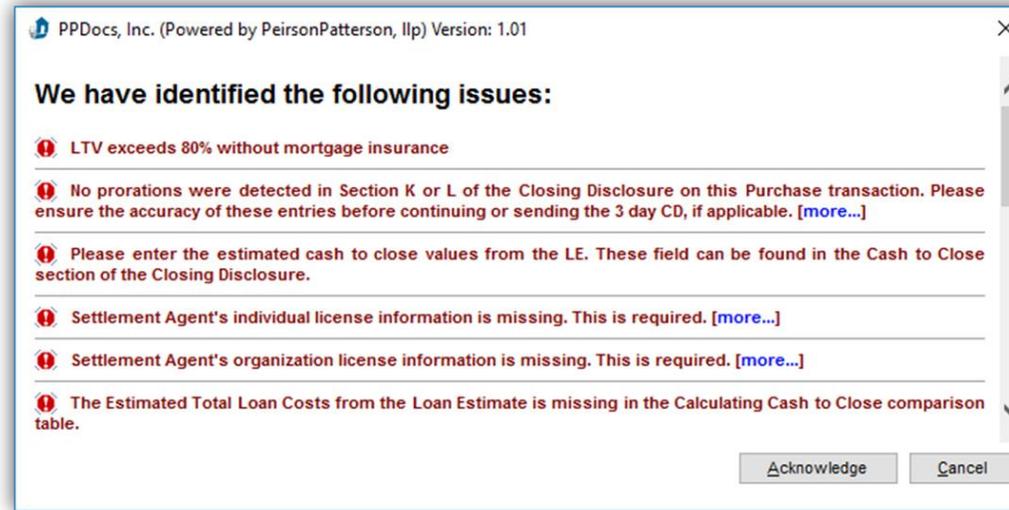
PPDocs, Inc. (Powered by PeirsonPatterson, IIP) Version: 1.01

Loan Program  
Fannie Mae

Loan Plan  
FNMA 3200 Fixed-Rate Note Details...

Back Continue Cancel

Correct any audit errors or click  
Acknowledge

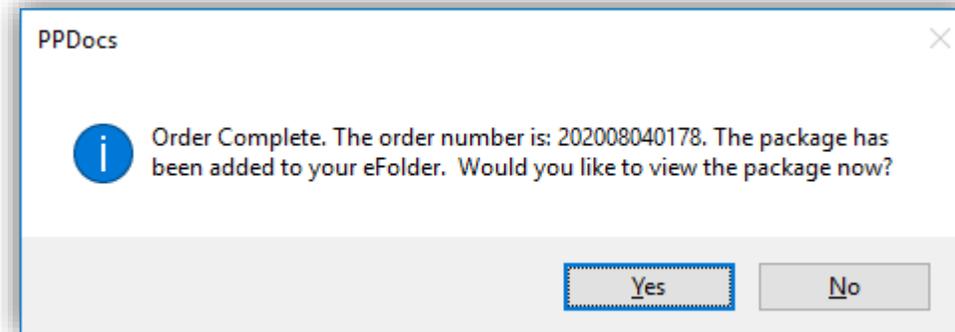


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**We have identified the following issues:**

- LTV exceeds 80% without mortgage insurance**
- No prorations were detected in Section K or L of the Closing Disclosure on this Purchase transaction. Please ensure the accuracy of these entries before continuing or sending the 3 day CD, if applicable. [more...]**
- Please enter the estimated cash to close values from the LE. These field can be found in the Cash to Close section of the Closing Disclosure.**
- Settlement Agent's individual license information is missing. This is required. [more...]**
- Settlement Agent's organization license information is missing. This is required. [more...]**
- The Estimated Total Loan Costs from the Loan Estimate is missing in the Calculating Cash to Close comparison table.**

You will receive confirmation  
that the order is complete.  
Documents will be immediately  
available in the eFolder.



PPDocs

**i** Order Complete. The order number is: 202008040178. The package has been added to your eFolder. Would you like to view the package now?

- For profile updates please click [HERE](#).
- For new and existing lender setup follow the link [HERE](#).
- For support questions regarding the Direct integration experience, please send an email to [direct@ppdocs.com](mailto:direct@ppdocs.com) or [support@ppdocs.com](mailto:support@ppdocs.com)
- For general accounts questions please reach out to your PPDocs account representative