

## DocuSign Application: Frequently Asked Questions

1. **Q: I received a DocuSign request to provide documentation, is this a legitimate request from Pennymac? Requests did not come from DocuSign previously.**

*A: Yes. Collection requests for Quarterly Financials, Officer Certification, and Annual Renewal are now requested via DocuSign. The e-mail will come from "[PCGApproval@pnmac.com](mailto:PCGApproval@pnmac.com) via DocuSign".*

2. **Q: The document I received does not have fields to fill out and it is asking me to assign roles. Am I supposed to print the form out to complete?**

*A: No. DocuSign requests are sent to one e-mail address (an individual or group), as outlined below:*

- *Initial Recipient: The initial recipient should access DocuSign via the e-mailed link, they will be prompted to designate someone to "complete the application" and someone to execute the forms as an "authorized signer."*
- *Completing the Application: Once the roles are assigned by the initial recipient, the person assigned to "complete the application" will receive a link to the DocuSign package, the person completing the application should complete all required fields and select "Finish" (no signatures are required at this stage).*
- *Signing Documents and Submitting: Upon selecting "Finish" the person assigned as "authorized signer" will receive an e-mail from DocuSign; they can access the link, view the completed application, and sign all necessary documents. Once signed, the "authorized signer" should select "Finish" in order to submit the application.*

*Note: if the same person will be completing and acting as authorized signer, the same contact information can be entered in both roles, but the system will behave as described above.*

3. **Q: Can the DocuSign package be sent to multiple people at once to complete?**

*A: No. DocuSign allows one user to complete their assigned sections, the package cannot be worked on simultaneously by multiple contact e-mails. However, if the client's contact e-mail is a group inbox, anyone with access to log in with the group e-mail will have access to work on the DocuSign request.*

4. **Q: I already designated the contacts for the DocuSign package, but need to update to a new contact e-mail. How do I update the contact?**

*A: If a contact e-mail needs to be re-assigned after designation, please e-mail [PCGApproval@pnmac.com](mailto:PCGApproval@pnmac.com) for assistance with the DocuSign package re-assignment.*