



RON Certification Program

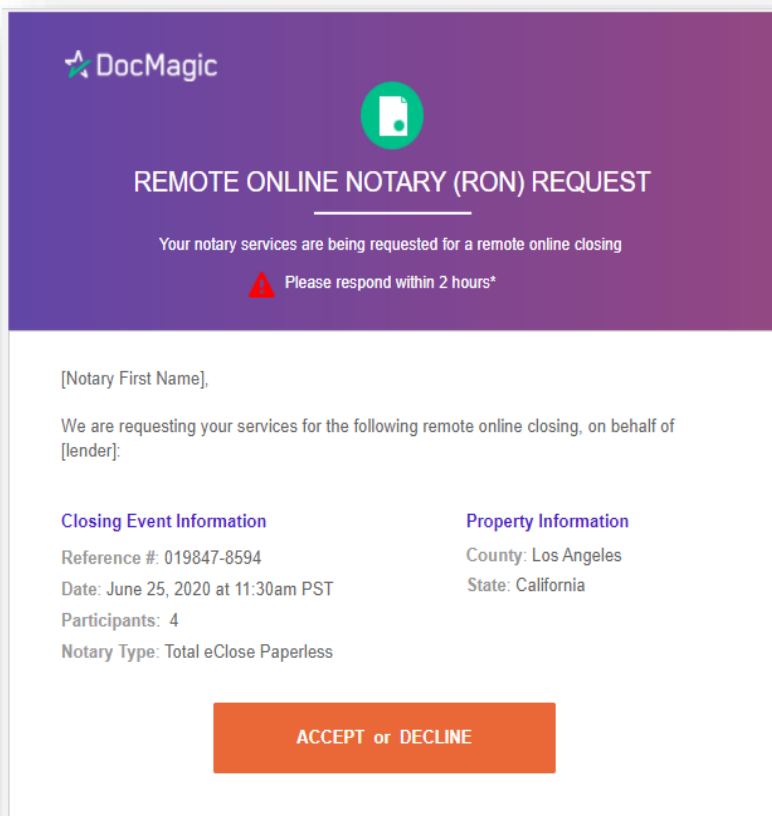
*Connect Better. Close Faster.*

Guidebook


# Welcome to Your Notary Guidebook


Welcome to DocMagic®. In this specialized, step-by-step walk-through of the R.O.N. process, we will help you get proficient with:

- ✓ Benefits of an eClosing
- ✓ System Requirements
- ✓ Invitation Acceptance
- ✓ Notary eClose Console Usage
- ✓ The DocMagic RON eClosing Process




The image shows a screenshot of a DocMagic Remote Online Notary (RON) Request form. The form has a purple header with the DocMagic logo and a document icon. Below the header, the title "REMOTE ONLINE NOTARY (RON) REQUEST" is centered. A message states: "Your notary services are being requested for a remote online closing" followed by a red triangle icon and "Please respond within 2 hours\*". The main body of the form is white and contains the following text: "[Notary First Name], We are requesting your services for the following remote online closing, on behalf of [lender]:". Below this, there are two columns of information. The left column is titled "Closing Event Information" and contains: "Reference #: 019847-8594", "Date: June 25, 2020 at 11:30am PST", "Participants: 4", and "Notary Type: Total eClose Paperless". The right column is titled "Property Information" and contains: "County: Los Angeles" and "State: California". At the bottom of the form, there is an orange button with the text "ACCEPT or DECLINE".

 DocMagic



**REMOTE ONLINE NOTARY (RON) REQUEST**

Your notary services are being requested for a remote online closing

 Please respond within 2 hours\*

[Notary First Name],

We are requesting your services for the following remote online closing, on behalf of [lender]:

Closing Event Information	Property Information
Reference #: 019847-8594	County: Los Angeles
Date: June 25, 2020 at 11:30am PST	State: California
Participants: 4	
Notary Type: Total eClose Paperless	

**ACCEPT or DECLINE**



# Benefits of an eClosing

- ✓ Closings reduced from 60 minutes to 15 minutes
- ✓ Lower risk for operational errors
  - No missing data or signatures
- ✓ Better Authentication and Security
- ✓ Tamper-proof seal protects data and documents
- ✓ eVault keeps electronic record
- ✓ More efficient secondary market execution
  - No more trailing documents
  - Fund faster with fewer exceptions
- ✓ Sets you apart in the marketplace
  - ✓ More flexibility for the borrowers
  - ✓ No paper
  - ✓ No shipping fees
  - ✓ No storage costs
- ✓ Borrowers can review their documents prior to closing

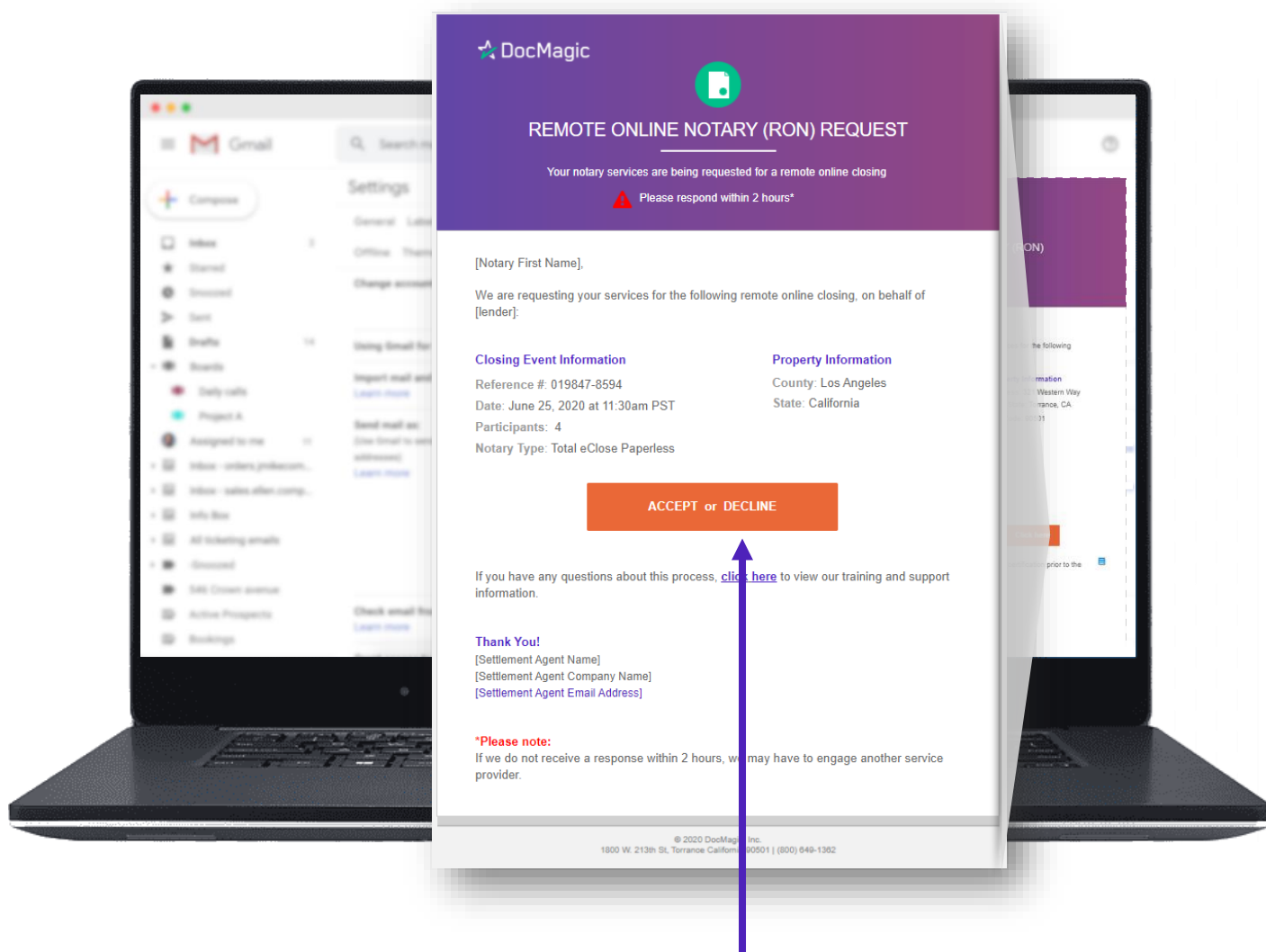


# System Requirements



# Remote Online Notary Request

The Notary (you) receives a request for R.O.N. services from the Settlement Agent.

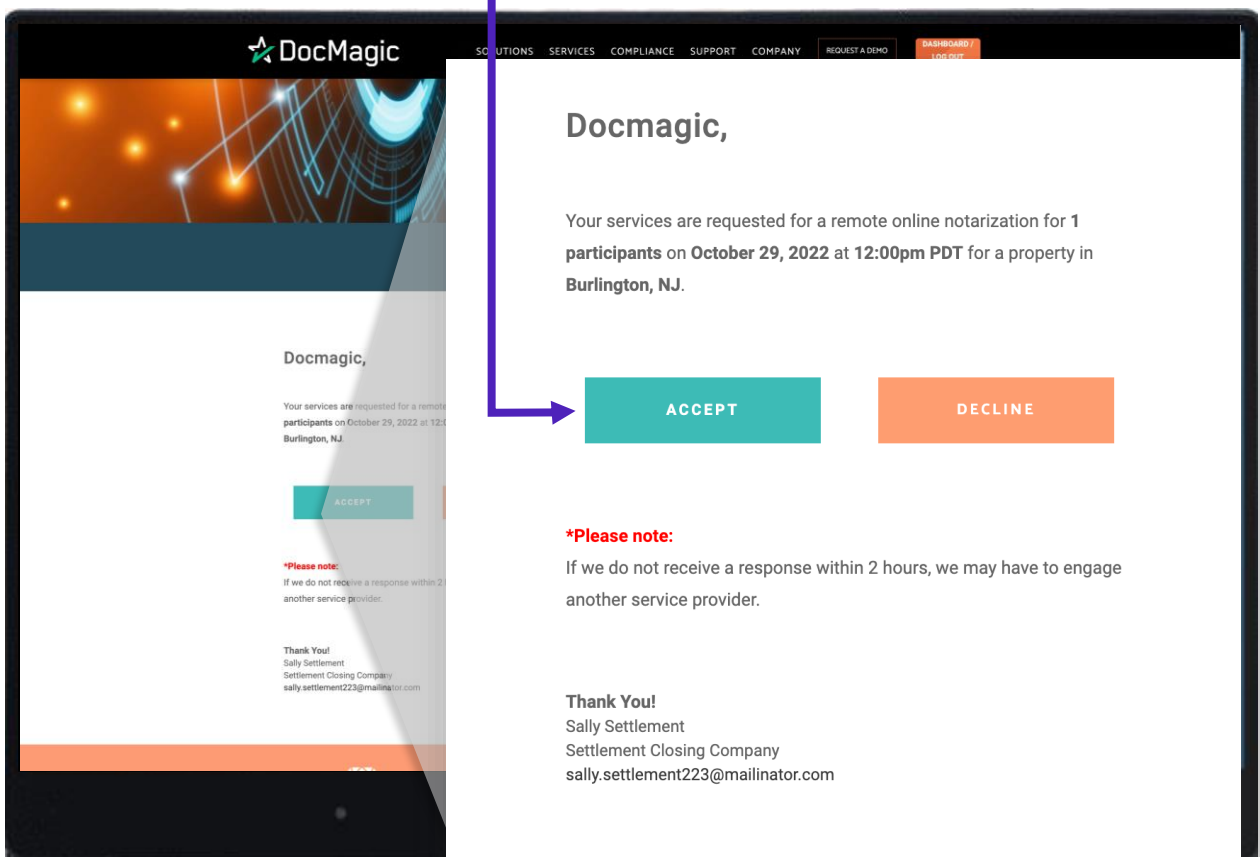


The email includes a link to accept or decline the request.



# Accept or Decline

You'll be taken to a page where you can accept or decline the RON request.



**Pro Tip:** You've got two (2) hours to accept or decline before the system alerts the Settlement Agent to assign another Notary.



## Optional: Add Comments

Clicking Accept on the previous page confirms your acceptance. You don't need to do anything else here.

**Docmagic**

SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY [REQUEST A DEMO](#) [DASHBOARD / LOG OUT](#)

### REMOTE ONLINE NOTARY (RON) REQUEST

**Docmagic,**  
Thank you for accepting our request!  
You are confirmed for the eClosing. Please check your email for additional information.

eClosing Information	Property Information
Date: November 28, 2023	City: FRISCO
Time: 10:30am PST	State: NJ
Participants: 1	Transaction Type: Conventional

**Additional Comments**  
Enter any comments you may have

**SUBMIT**

**DELL**

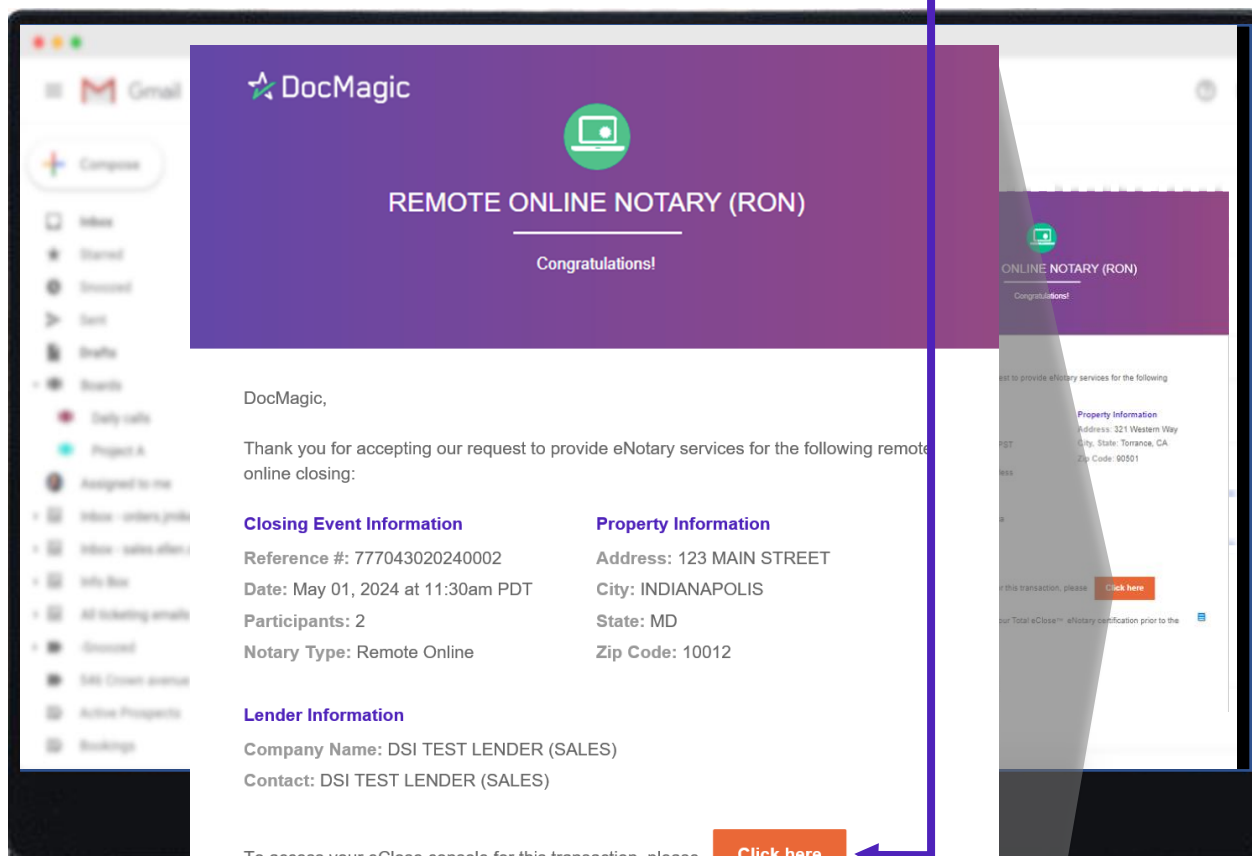
However, you have the option to pass on information to the settlement agent. Just type what you want in the comment box and click Submit.

Note: Please don't try to log in from this page.



# Access to the eClose Console

Once you accept the request, you'll get this confirmation email that grants access to your eClose console. This is how you'll get into your portal – *you do not log in through our website.*



**DocMagic**

**REMOTE ONLINE NOTARY (RON)**

**Congratulations!**

DocMagic,

Thank you for accepting our request to provide eNotary services for the following remote online closing:

<b>Closing Event Information</b>	<b>Property Information</b>
Reference #: 777043020240002	Address: 123 MAIN STREET
Date: May 01, 2024 at 11:30am PDT	City: INDIANAPOLIS
Participants: 2	State: MD
Notary Type: Remote Online	Zip Code: 10012

**Lender Information**

Company Name: DSI TEST LENDER (SALES)  
Contact: DSI TEST LENDER (SALES)

To access your eClose console for this transaction, please [Click here](#)

**\*Please note:** You must obtain your Total eClose™ eNotary certification prior to the closing on May 01, 2024.

If you have not conducted a Remote Online Notarization in the last 30 - 45 days, you have an opportunity to refresh your skills by re-taking our RON Certification course. Click [HERE](#) to access the course.

Take advantage of the **R.O.N. Guidebook!** Click [HERE](#) to download it.

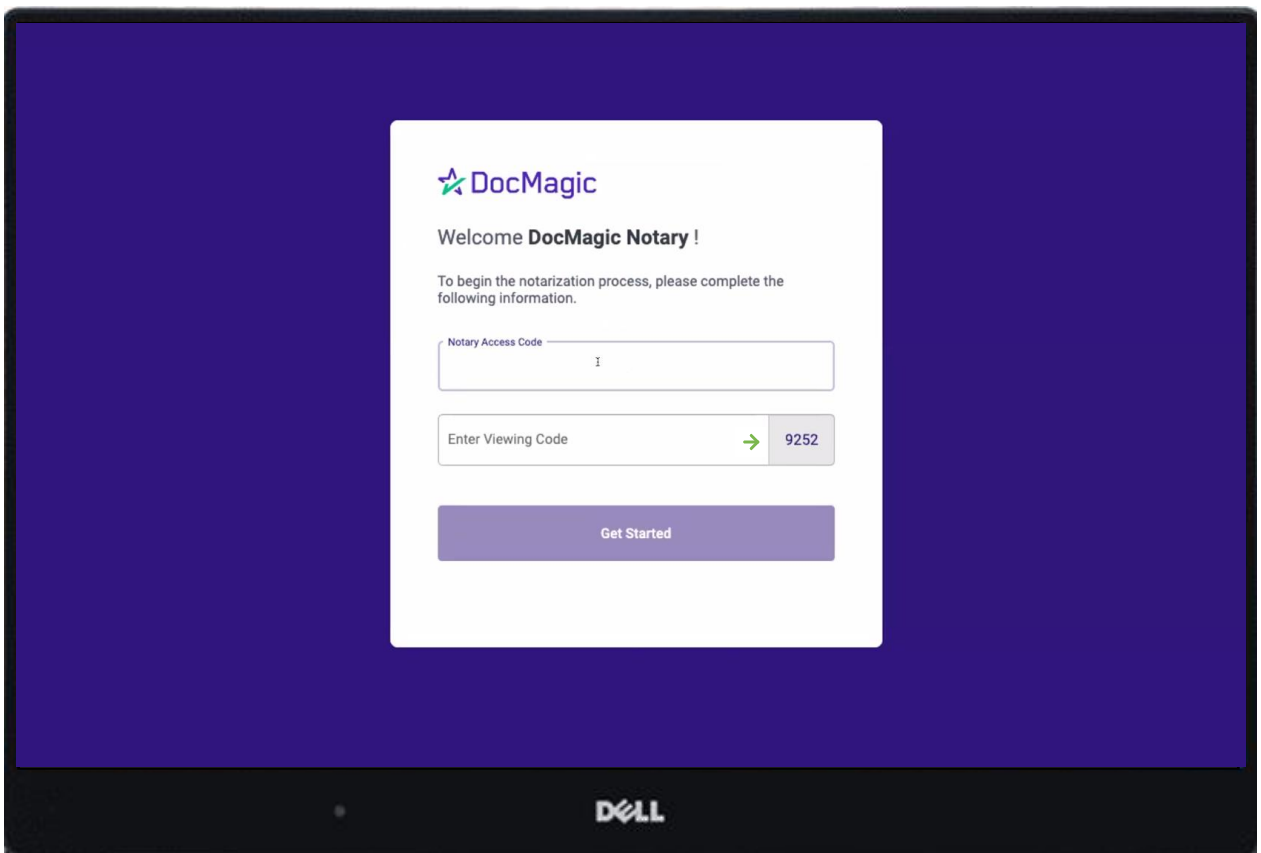
**Thank You!**  
Byron Settlement  
SETTLEMENT CLOSING COMPANY  
[struitt@docmagic.com](mailto:struitt@docmagic.com)





## Using Your Access Code

You will log in using the Notary Access Code that was given to you with your **Secure Insight** Notary certification and enter the viewing code on your screen.



The image shows a Dell monitor displaying the DocMagic Notary login interface. The background is a solid dark blue. In the center, there is a white rectangular box containing the following elements:

- DocMagic** logo (a stylized star with a green checkmark) and the text "DocMagic".
- Welcome DocMagic Notary !**
- Instructional text: "To begin the notarization process, please complete the following information."
- A text input field labeled "Notary Access Code" with a cursor inside.
- A text input field labeled "Enter Viewing Code" with a green arrow button to its right and the number "9252" displayed in a grey box.
- A large purple button labeled "Get Started".

The Dell logo is visible at the bottom center of the monitor frame.



# eClose Console

All pertinent information regarding the parties on the transaction is at the top of the notary portal.

**DocMagic eClose Console (Notary)**

**LOAN** Loan #: 1636481915201  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 1636481915201 (...)

**LENDER** Company: SAMPLE SONS L...  
Contact: Michael Morford  
Email: mikem@docmagic...  
Phone: (555) 555-5555

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: strutt@docmagic.c...  
Phone: (987) 555-4321

**COUNTDOWN TO CLOSING**  
DAYS: - HOURS: - MINUTES: - SECONDS: -  
Date: Apr 18, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[Details](#) [eJournal](#) [Action Log](#) [Start eClosing](#)

**Signers (3)**

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	John Smith strutt@docmagic.com	Borrower	Doc Magic ron-test@docmagic.com	DocMagic RON 11/9/2021 - 12:00am			● Not Started	<a href="#">Open Signing Room</a>
2	Oliver Originator oliver.originator@mailnat...	Originator					● Ready to Sign	<a href="#">Open Signing Room</a>
3	Sally Settlement strutt@docmagic.com	Settlement Agent					● Ready to Sign	<a href="#">Open Signing Room</a>

**Documents (6)** [Add](#) [Edit](#) [Delete](#) [Preview](#) [Print](#) [Download](#) [Preview Mode](#) ☐ OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	✓	
2	Multistate Fixed Rate Electronic Note	4	1	✓	
3	MERS New Jersey Mortgage	15	2	✓	
4	Specific Closing Instructions	4	2	✓	
5	Occupancy and Financial Status Affidavit	3	2	✓	
6	Signature Affidavit and AKA Statement	2	2	✓	

The Signers area highlights all participants, Knowledge Based Authentication (KBA) and I.D. Verification.



# Countdown Clock

The eClosing Countdown Clock keeps you on track right up to the moment of closing.

The Edit button at the bottom right of the Countdown Clock allows you to edit the closing time for all participants.

**DocMagic eClose Console (Notary)**

**LOAN** Loan #: 1636481916201  
Primary Borrower: John Smith  
Type: eClosing  
Package ID: 417659  
Worksheet #: 1636481916201 (...)

**LENDER** Company: SAMPLE SONS L...  
Contact: Michael Morford  
Email: mikem@docmagic.com  
Phone: (555) 555-5555

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: struitt@docmagic.com  
Phone: (987) 555-4321

**COUNTDOWN TO CLOSING**  
DAYS HOURS MINUTES SECONDS  
Date: Apr 18, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[Start eClosing](#)

**Signers (3)**

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	John Smith struitt@docmagic.com	Borrower	Doc Magic ron-test@docmagic.com	DocMagic RON 11/9/2021 - 12:00am			● Not Started	<a href="#">Open Signing Room</a>
2	Oliver Originator oliver.originator@mailnat...	Originator					● Ready to Sign	<a href="#">Open Signing Room</a>
3	Sally Settlement struitt@docmagic.com	Settlement Agent					● Ready to Sign	<a href="#">Open Signing Room</a>

**Documents (6)** [Add](#) [Edit](#) [Delete](#) [Download](#) Preview Mode ☐ OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	✓	
2	Multistate Fixed Rate Electronic Note	4	1	✓	
3	MERS New Jersey Mortgage	15	2	✓	
4	Specific Closing Instructions	4	2	✓	
5	Occupancy and Financial Status Affidavit	3	2	✓	
6	Signature Affidavit and AKA Statement	2	2	✓	



# Help Button

From the Notary Console, you can find a tutorial just like the one you're reading now. Just click on the name, then Help.

**DocMagic eClose Console (Notary)**

**LOAN** Loan #: 1636481915201  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 1636481915201 (...)

**LENDER** Company: SAMPLE SONS L...  
Contact: Michael Morford  
Email: mikem@docmagic...  
Phone: (555) 555-5555

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: struitt@docmagic.c...  
Phone: (987) 555-4321

**Signers (3)**

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	
1	John Smith struitt@docmagic.com	Borrower	Doc Magic ron-test@docmagic.com	DocMagic RON 11/9/2021 - 12:00am			● Not Started
2	Oliver Originator oliver.originator@mailnat...	Originator					● Ready to Sign
3	Sally Settlement struitt@docmagic.com	Settlement Agent					● Ready to Sign

**Documents (6)**

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	✓	
2	Multistate Fixed Rate Electronic Note	4	1	✓	
3	MERS New Jersey Mortgage	15	2	✓	
4	Specific Closing Instructions	4	2	✓	
5	Occupancy and Financial Status Affidavit	3	2	✓	
6	Signature Affidavit and AKA Statement	2	2	✓	



# Inspecting and Prepping Documents

The Documents area includes all the documents in the package that will be eSigned. You can click on each document separately to review for accuracy.

**DocMagic eClose Console (Notary)**

**LOAN** Loan #: 1636481916201  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 1636481916201 (...)

**LENDER**

**Signers (3)**

#	Signer Name / Email	Role
1	John Smith strull@docmagic.com	Borrower
2	Oliver Originator oliver.originator@mailnat...	Originator
3	Sally Settlement strull@docmagic.com	Settlement Agent

**Documents (6)**

- 1 Closing Disclosure
- 2 Multistate Fixed Rate Electronic Note
- 3 MERS New Jersey Mortgage
- 4 Specific Closing Instructions
- 5 Occupancy and Financial Status Affidavit
- 6 Signature Affidavit and AKA Statement

**Notary Certificate Form:**

[Space Below This Line For Acknowledgment]

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of CALIFORNIA )  
County of MERCER )

On \_\_\_\_\_ before me, \_\_\_\_\_  
Date Here Insert Name and Title of the Notarizing Officer

personally appeared Eliseo Sample

\_\_\_\_\_  
Name(s) of Signer(s)

who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

\_\_\_\_\_  
Signature of Notary Public

Notary Seal



# Document Icon Functions

The leftmost icon, the piece of paper with the plus sign, allows you to upload *new* documents to the package from your computer.\*

**DocMagic Close Console (Notary)**

**LOAN** Loan #: 936481916201  
Primary Borrower: John Smith  
Type: Closing  
Package ID: 47659  
Worksheet #: 936481916201 (...)

**LENDER** Company: SAMPLE SONS L...  
Contact: Michael Morford  
Email: mikem@docmagic...  
Phone: (555) 555-5555

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: strult@docmagic.c...  
Phone: (987) 555-4321

**COUNTDOWN TO CLOSING**  
DAYS: 0 HOURS: 21 MINUTES: 35 SECONDS: 21  
Date: Aug 24, 2022 (Wed) Time: 10:15am PDT

**Signers (3)**

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	John Smith strult@docmagic.com	Borrower	Doc Magic ron-test@docmagic.com	DocMagic RON 11/9/2021 - 12:00am			● Not Started	
2	Oliver Originator oliver.originator@mail...	Originator					● Ready to Sign	
3	Sally Settlement strult@docmagic.com	Settlement Agent					● Ready to Sign	

**Documents (6)** Preview Mode ☐ OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	✓	
2	Multistate Fixed Rate Electronic Note	4	1	✓	
3	MERS New Jersey Mortgage	15	2	✓	
4	Specific Closing Instructions	4	2	✓	
5	Occupancy and Financial Status Affidavit	3	2	✓	
6	Signature Affidavit and AKA Statement	2	2	✓	

The PDF icon allows you to download a PDF copy of the full document package.



# Document Icon Functions

The rightmost icon, the cloud with the arrow pointing up, allows you to upload ink-signed documents to the package.

The screenshot shows the DocMagic eClose Console (Notary) interface. The top navigation bar includes the DocMagic logo, 'eClose Console (Notary)', and a user profile icon labeled 'Doc'. The main content area is divided into several sections:

- LOAN**: Loan #: 1636481916201, Primary Borrower: John Smith, Type: EClosing, Package ID: 417659, Worksheet #: 1636481916201 (...).
- LENDER**: Company: SAMPLE SONS L..., Contact: Michael Morford, Email: mikem@docmagic..., Phone: (555) 555-5555.
- SETTLEMENT AGENT**: Company: Settlement Closing..., Contact: Sally Settlement, Email: struitt@docmagic.c..., Phone: (987) 555-4321.
- COUNTDOWN TO CLOSING**: A timer showing 0 days, 21 hours, 35 minutes, and 21 seconds. Date: Aug 24, 2022 (Wed), Time: 10:15am PDT.

Below these sections are tabs for 'Details', 'eJournal', and 'Action Log'. A 'Start eClosing' button is also present.

The **Signers (3)** section contains a table with the following data:

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	John Smith struitt@docmagic.com	Borrower	Doc Magic ron-test@docmagic.com	DocMagic RGN 11/9/2021 - 12:00am	✉ ○	🔑 ○	● Not Started	Open Signing Room
2	Oliver Originator oliver.originator@gmailat...	Originator					● Ready to Sign	Open Signing Room
3	Sally Settlement struitt@docmagic.com	Settlement Agent					● Ready to Sign	Open Signing Room

The **Documents (6)** section includes a toolbar with icons for document management. The rightmost icon, a cloud with an upward arrow, is highlighted by a purple arrow from the text box above. Below the toolbar is a table with the following data:

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	✓	
2	Multistate Fixed Rate Electronic Note	4	1	✓	
3	MERS New Jersey Mortgage	15	2	✓	
4	Specific Closing Instructions	4	2	✓	
5	Occupancy and Financial Status Affidavit	3	2	✓	
6	Signature Affidavit and AKA Statement	2	2	✓	

The Dell logo is visible at the bottom center of the monitor frame.

You can only upload ink signed documents with QR codes that help the system place the documents in the correct stacking order. Don't confuse this with the other upload function.



# Tagging Documents + Guide

Click on the Pencil Icon to open the Document Editor. This allows you to check existing tags and add new ones to your documents. *Click [here](#) for the guide.*

The screenshot displays the DocMagic eClosing Console (Notary) interface. At the top, there's a navigation bar with the DocMagic logo and a user profile icon. Below this, the main dashboard is divided into several sections. On the left, there's a 'LOAN' section with details for Loan # 16364816291, Primary Borrower John Smith, Type EClosing, Package ID 417659, and Worksheet # 16364816291. Next to it is the 'LENDER' section, showing Company SAMPLE SONS L., Contact Michael Morford, Email mikem@docmagic.com, and Phone (555) 555-5555. To the right is the 'SETTLEMENT AGENT' section, showing Company Settlement Closing..., Contact Sally Settlement, Email strutt@docmagic.com, and Phone (987) 555-4321. Further right is a 'COUNTDOWN TO CLOSING' section with a timer for 19 days, 19 hours, 19 minutes, and 19 seconds. Below these sections are tabs for 'Details', 'eJournal', and 'Action Log'. A 'Signers (3)' table lists three signers: John Smith (Borrower), Oliver Originator (Originator), and Sally Settlement (Settlement Agent). A 'Documents (6)' table lists two documents: 'Closing Disclosure' and 'Multistate Fixed Rate Electronic Note'. A 'Borrower's Certification, Authorization and Consent' section is shown with a 'Done' button. The 'Document Editor' is open, showing a document titled 'Borrower's Certification, Authorization and Consent' with a 'Signature' field and a 'Date' field. The 'Document Editor' has a sidebar with 'eTags' and 'Notary' sections.

Please note that the Document Editor does not allow you to make modifications to tags programmed by DocMagic.





# Start eClose

When you're ready to Start the eClosing, click the Start eClosing button to activate the Start eClosing dialogue box.

**Start eClosing**

**You are about to start the eClosing process!**

A meeting invitation will be sent to the participants indicated below.

**Before you continue, please verify the following:**

- The loan package is complete and ready for eClosing
- All uploaded or e-enabled documents have been included

**Select the eClosing Participants below:**

Select	Signer	Email	Date	Time
<input checked="" type="checkbox"/>	Stephen Truitt	struitt@docmagic.com	3/28/2024	10:30pm
<input checked="" type="checkbox"/>	Kimberly Abelson-truitt	struitt@docmagic.com	3/28/2024	10:30pm
<input type="checkbox"/>	Byron Settlement	struitt@docmagic.com		

☒ Include link for knowledge-based authentication (KBA)

**Document**

#	eSign En		
1	Closing Disclosure	5	1
2	Multistate Fixed Rate Electronic Note	4	1

**Signers (3)**

#	Signer Na
1	John Smith struitt@doc
2	Oliver Orig oliver.orig
3	Sally Settlem struitt@doc

**Start eClosing**

Select the participant(s) you want to include in the signing room.

You'll need to repeat this process if another participant will be signing at a different time. Select all if everyone will be signing both at the same time.



# Start eClose

Borrowers are now required to complete KBA by default.

The screenshot shows the 'Start eClosing' window. A purple arrow points from the text box above to the 'Include link for knowledge-based authentication (KBA)' checkbox, which is checked. Another purple arrow points from the text box below to the 'Start eClosing' button. The interface includes a table of signers and a list of documents.

**Start eClosing**

You are about to start the eClosing process!

A meeting invitation will be sent to the participants indicated below.

Before you continue, please verify the following:

- The loan package is complete and ready for eClosing
- All uploaded or e-enabled documents have been included

Select the eClosing Participants below:

Select	Signer	Email	Date	Time
<input checked="" type="checkbox"/>	Stephen Truitt	struitt@docmagic.com	3/28/2024	10:30pm
<input checked="" type="checkbox"/>	Kimberly Abelson-truitt	struitt@docmagic.com	3/28/2024	10:30pm
<input type="checkbox"/>	Byron Settlement	struitt@docmagic.com		

☒ Include link for knowledge-based authentication (KBA)

Cancel Start eClosing

**Documents**

#	eSig			
1	Closing Disclosure	5	1	✓
2	Multistate Fixed Rate Electronic Note	4	1	✓

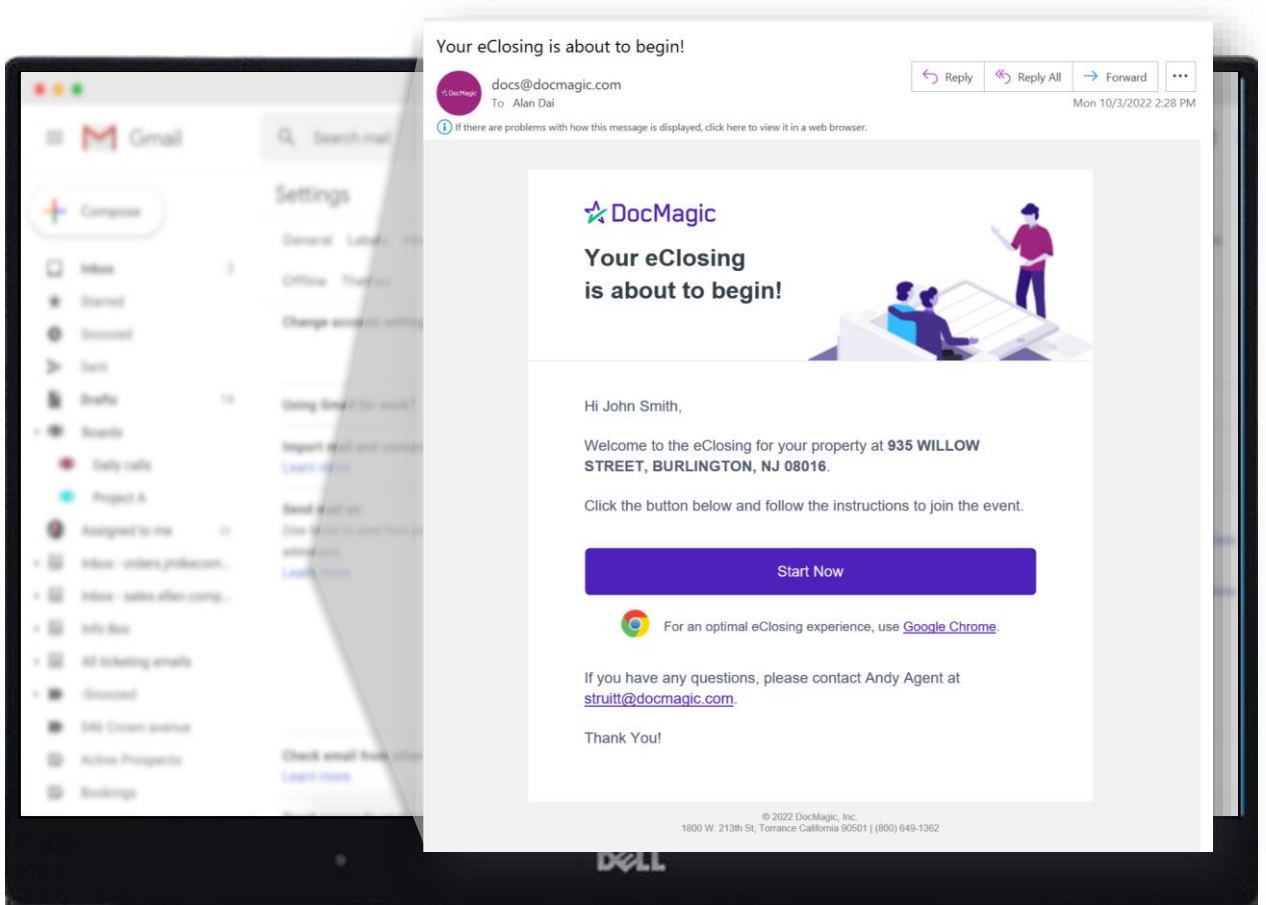
Click Start eClosing when ready.

Lenders may contact our support team to allow borrowers to bypass KBA in states that do not require it.



# Invitation Email

Participants will receive an invitation email containing all pertinent closing information and a **Start Now** button to enter the eClosing event.



Please note that participants can no longer do Remote Online Notarizations through a phone.

Please note that the next few slides (including this one) are from the borrower's perspective.



## Borrower Signing In

The Borrower logs in with the last four digits of their social security number\* and the viewing code.

DocMagic

Welcome **JOHN SMITH** !

To begin the review and signing of your documents, please complete the following information.

Last [4] digits of your SSN

Enter Viewing Code 5915

☐ I have read & agree to the [eSign Disclosure and consent](#) in its entirety.

Get Started

© 2022 DocMagic, Inc.

DELL

The borrower is required to click on and read the eSign Disclosure and Consent language before checking the box to get started.

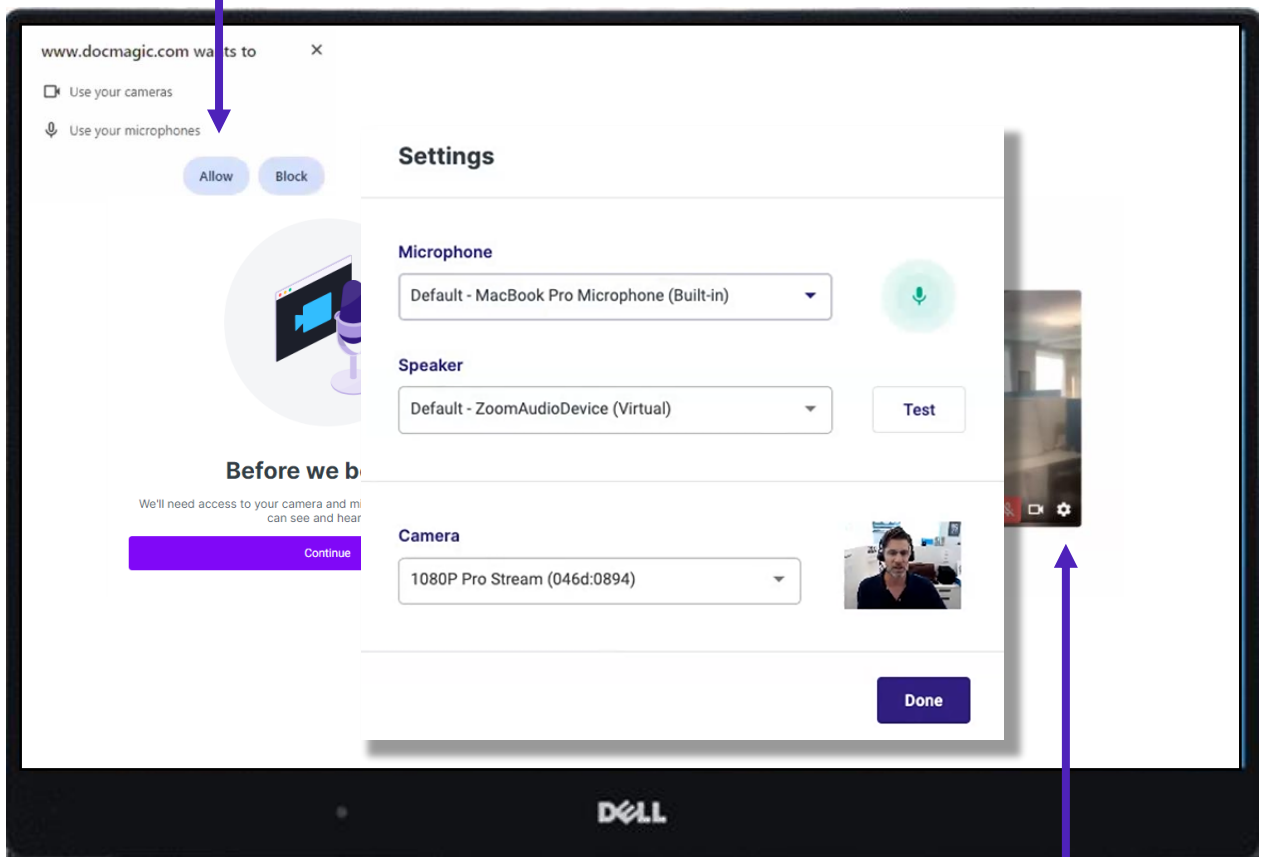
If the borrower gets a "login error" on this page, have them close the browser tab and click on the link in their email again.

\*If the borrower does not have an SSN, a Settlement Agent or Lender can create an Access Code for the borrower to access the eSign experience.



## Borrower Signing In

The borrower will be reminded to make sure their microphone and camera are activated. If they are prompted by the browser, please have them allow camera and microphone access.

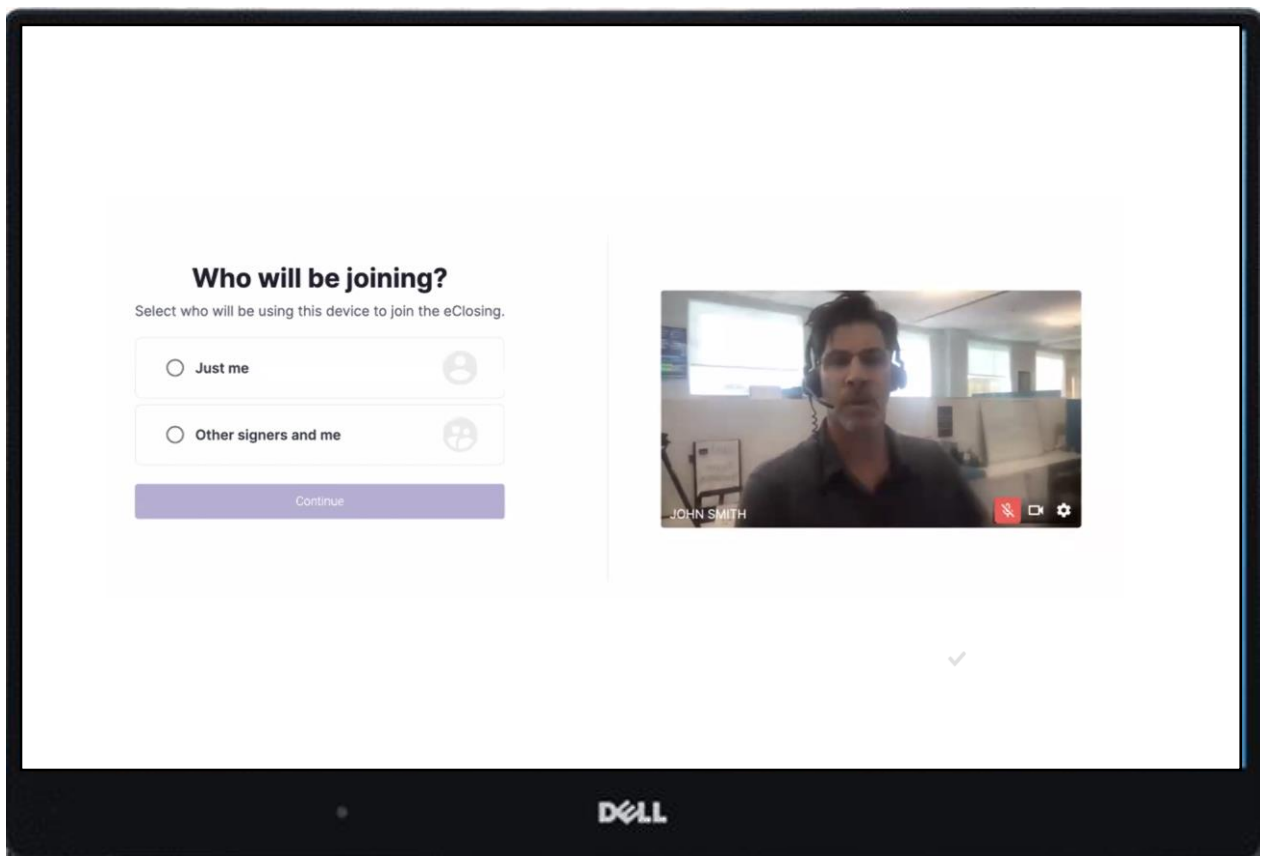


If they're having technical difficulties, have them click on the Settings icon to ensure that the correct microphone, speaker, and camera are selected.



## Borrower Signing In

The borrower then be asked if other signers will be joining the session *on the same device*.



If there are multiple borrowers but they are not using the same device, please have each of them select Just me.

This is strictly asking if multiple signers will be on a single device.

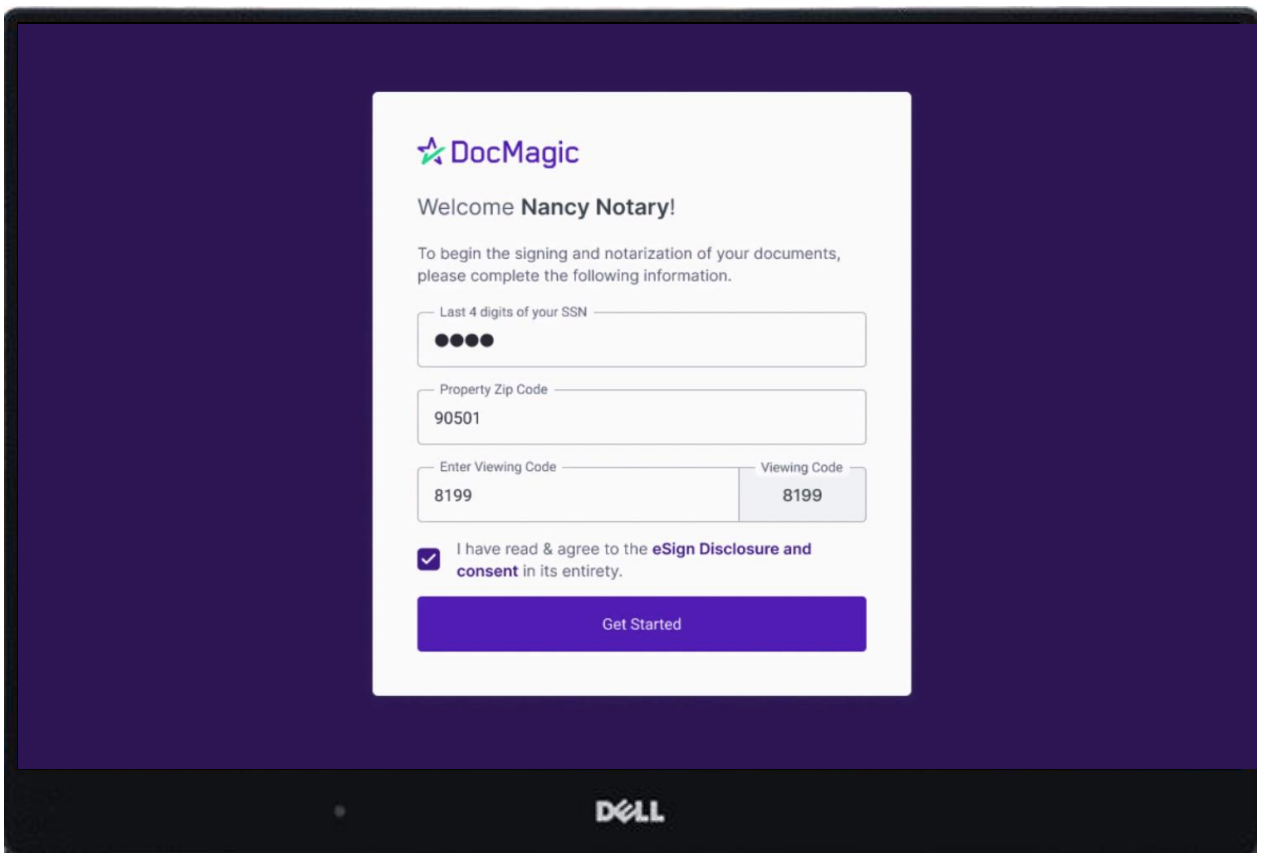
In addition, borrowers can not participate in Remote Online Notarizations using a phone.



## Accessing The Signing Room (Notary)

*Meanwhile, you'll be taken here after clicking Start eClose.*

Enter in the last four digits of your social, the zip code of the property, and the viewing code displayed below.



The screenshot shows a laptop screen displaying the DocMagic Notary Welcome page. The page has a dark blue background with a white central form. The form includes the DocMagic logo, a welcome message for 'Nancy Notary!', and instructions to complete information for signing and notarization. The form fields are: 'Last 4 digits of your SSN' (masked with four dots), 'Property Zip Code' (90501), 'Enter Viewing Code' (8199), and 'Viewing Code' (8199). There is a checkbox for 'I have read & agree to the eSign Disclosure and consent in its entirety.' which is checked. A 'Get Started' button is at the bottom of the form. The Dell logo is visible on the laptop bezel.

**DocMagic**

Welcome **Nancy Notary!**

To begin the signing and notarization of your documents, please complete the following information.

Last 4 digits of your SSN

Property Zip Code

Enter Viewing Code  Viewing Code

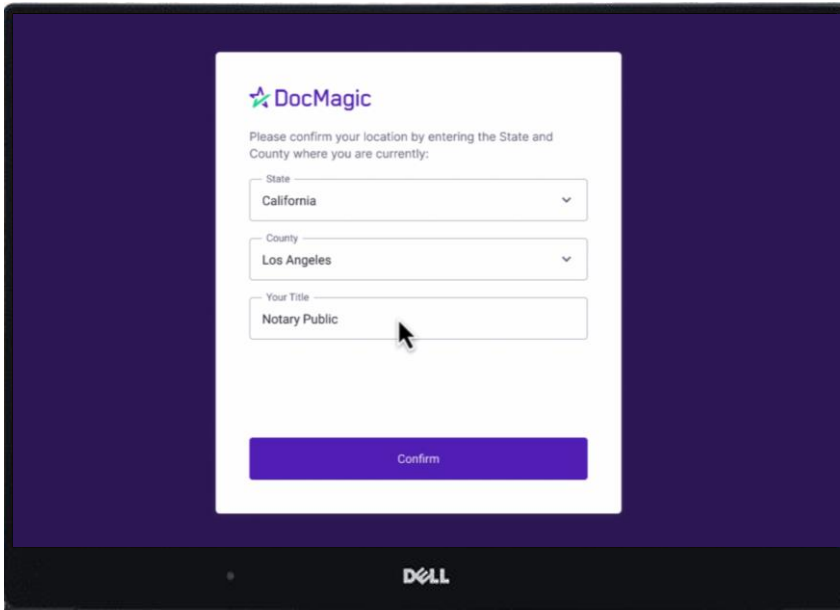
☒ I have read & agree to the **eSign Disclosure and consent** in its entirety.

[Get Started](#)

You'll also need to check the box agreeing to the eSign Disclosure and consent form before getting started.

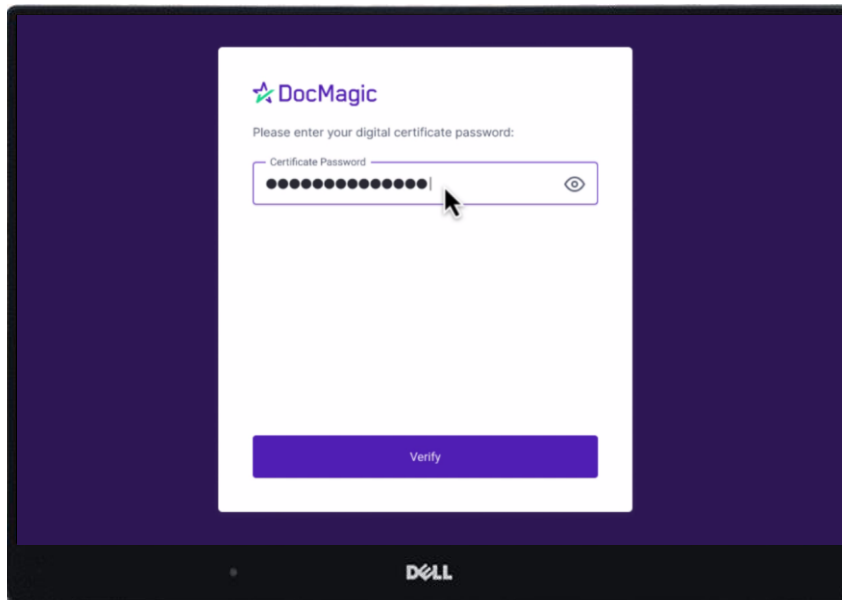


## Accessing The Signing Room (Notary)



The image shows a Dell monitor displaying the DocMagic web interface. The screen has a dark purple background. In the center is a white rectangular form. At the top of the form is the DocMagic logo (a green star with a purple outline) and the text "DocMagic". Below the logo, it says "Please confirm your location by entering the State and County where you are currently:". There are three input fields: "State" with "California" selected, "County" with "Los Angeles" selected, and "Your Title" with "Notary Public" entered. A mouse cursor is pointing at the "Your Title" field. At the bottom of the form is a large purple button labeled "Confirm". The Dell logo is visible at the bottom of the monitor frame.

Next, confirm your State, County, and Title before proceeding.



The image shows a Dell monitor displaying the DocMagic web interface. The screen has a dark purple background. In the center is a white rectangular form. At the top of the form is the DocMagic logo (a green star with a purple outline) and the text "DocMagic". Below the logo, it says "Please enter your digital certificate password:". There is a single input field labeled "Certificate Password" containing a series of black dots. A mouse cursor is pointing at the input field. To the right of the input field is an eye icon. At the bottom of the form is a large purple button labeled "Verify". The Dell logo is visible at the bottom of the monitor frame.

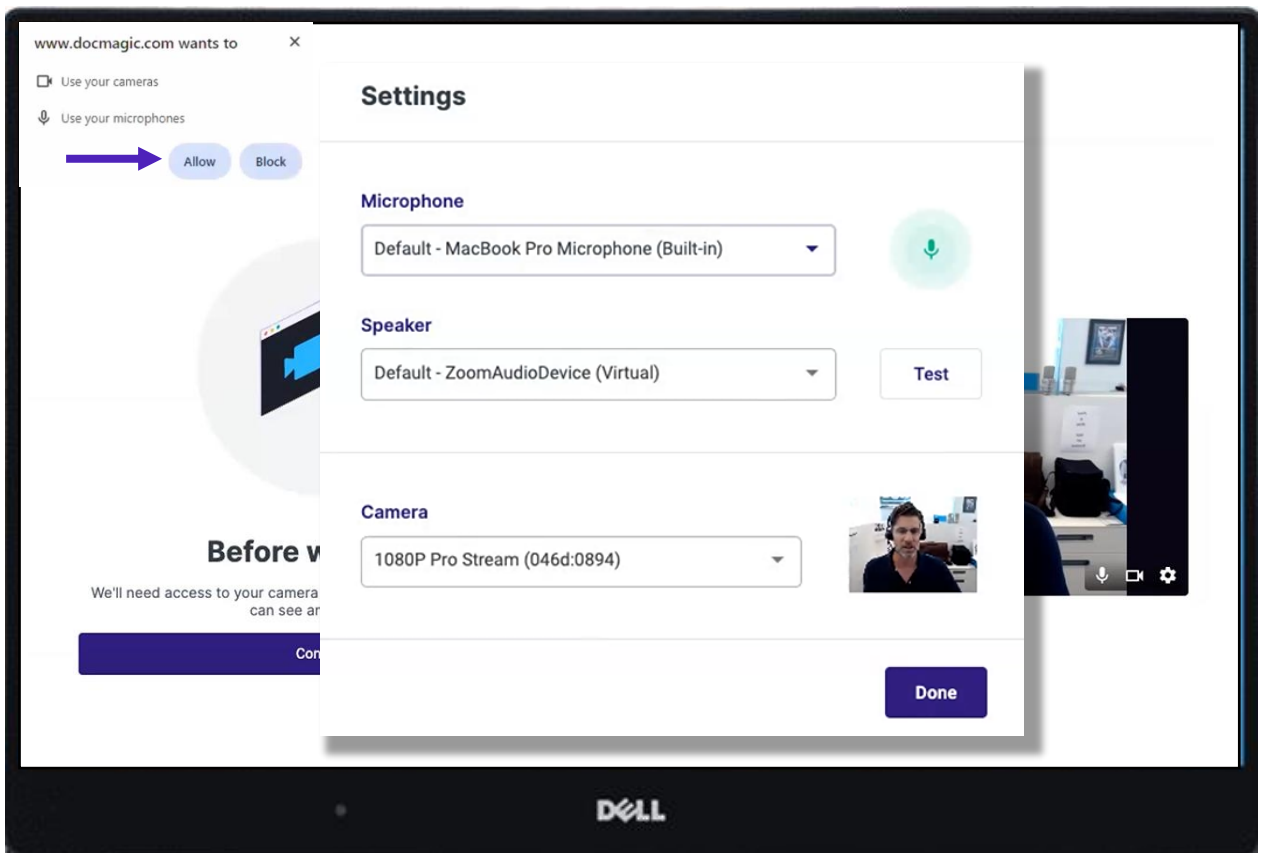
If you uploaded your certificate to Secure Insight during your onboarding process, you will also need to enter your certificate password.





## Mic and Camera Access (Notary)

Just like the borrower, before you join the meeting, you'll also be brought to this meeting room to ensure that your camera and microphone are working and accessible.



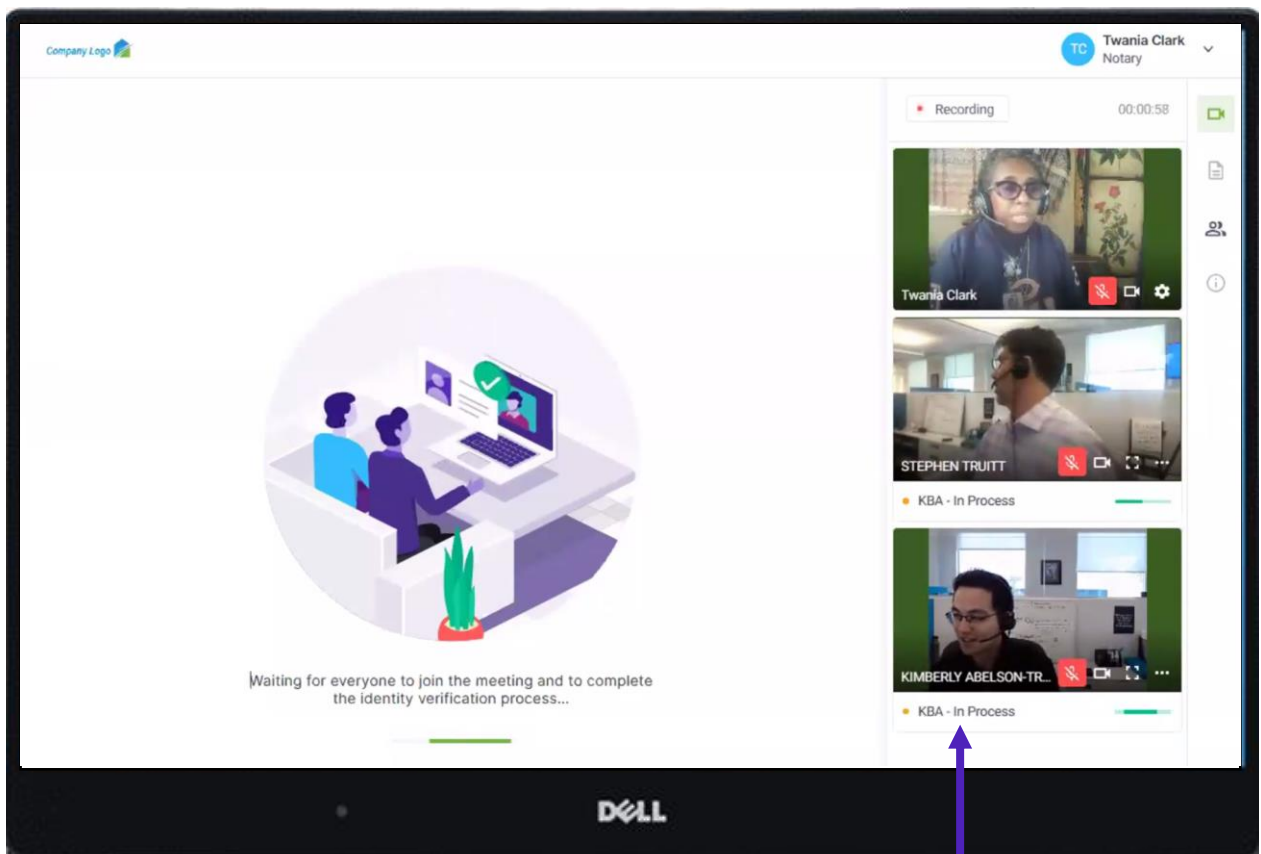
Please Note: If you are connected to a VPN and are experiencing issues logging into the signing experience, it may be due to VPN filtering traffic with proxies or other web filtering technologies.

To resolve this, disable traffic filtering.



# Knowledge Based Authentication

If Knowledge Based Authentication is enabled for the session, the borrower(s) will need to verify their identity when the first join.



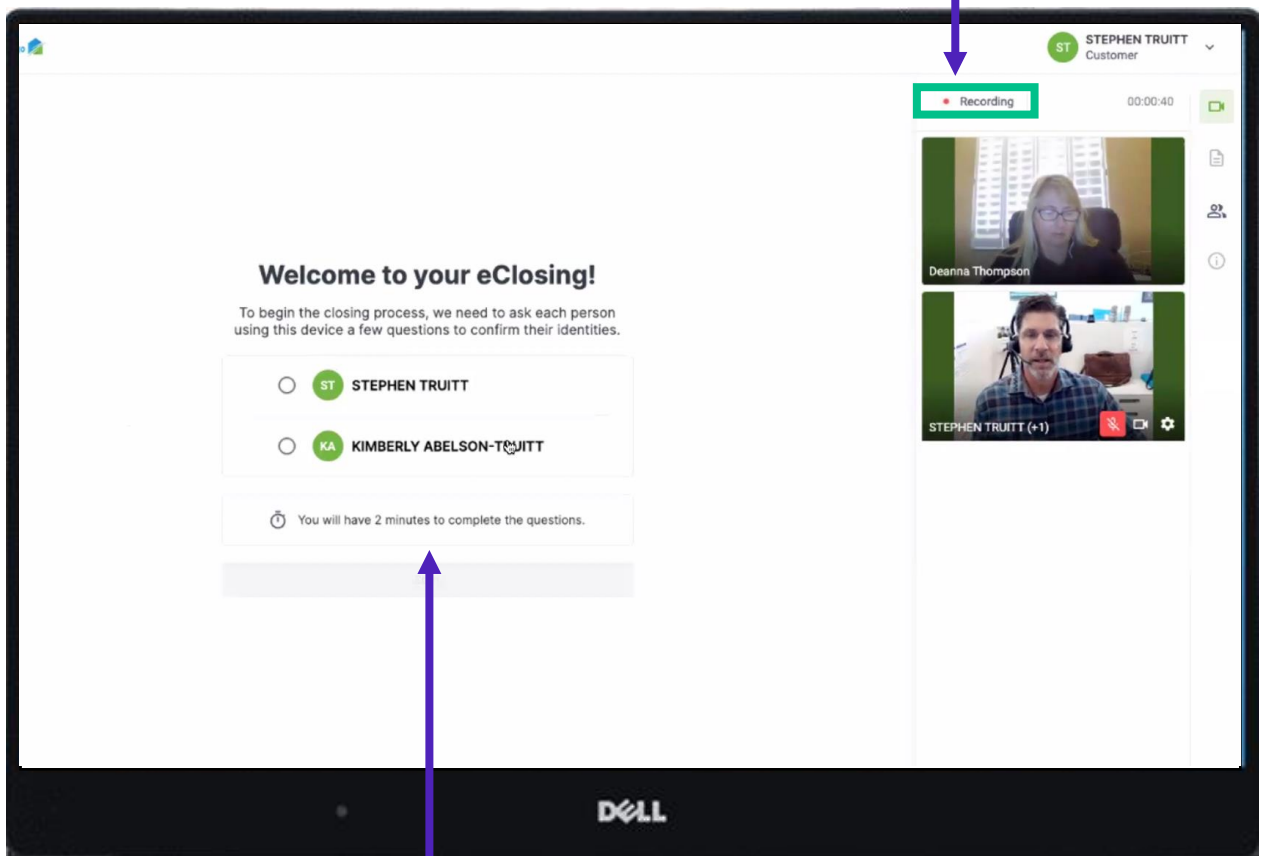
You'll see a KBA – In Process status under participants that are currently going through the process.

You will not be able to see the participants KBA – only the message above that says "waiting for everyone to complete the identity verification process"



# Knowledge Based Authentication

The moment the meeting begins, the session is automatically recorded.



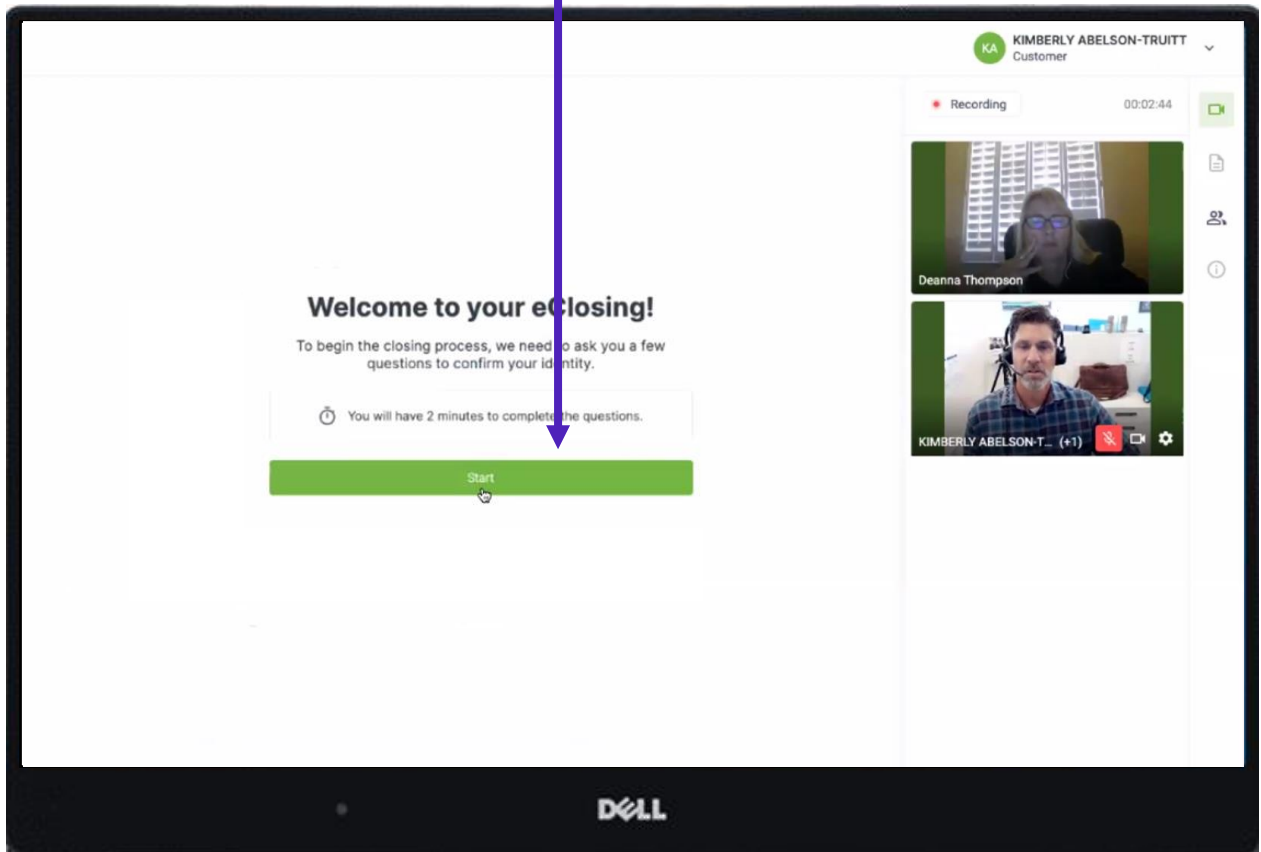
If there are multiple participants on the same device that need to do KBA, they will choose who goes first.

Please note that this screenshot, and the subsequent ones about KBA, are taken from the signer's perspective, not the notary's perspective.



# Knowledge Based Authentication

They have two minutes to answer their questions, *which you will not be able to see.*

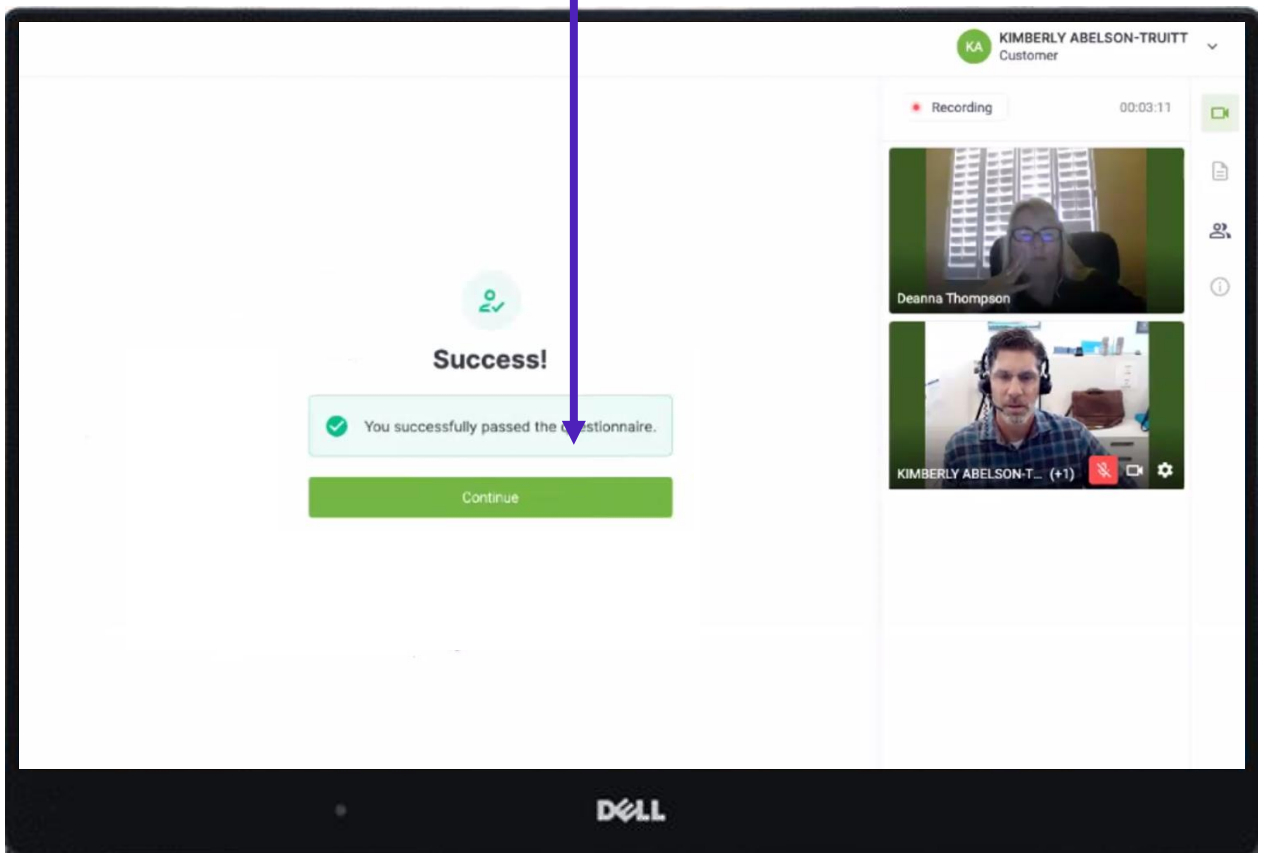


The participant will only be allowed 2 attempts to give 4 out of 5 correct answers. If they do not pass after two attempts, they will be locked out for 24 hours.



# Knowledge Based Authentication

When the Participant successfully completes the assessment, they will receive this confirmation where they can click Continue to join the closing room.



If required, the Notary would also initiate the I.D. Verification process. This must be done during the actual signing and will be covered in the next slides.



# Identity Validation Request

Go back to your Notary Portal and click on the phone icon\* for the borrower that needs to have their identity verified.

The screenshot shows the DocMagic eClose Console (Notary) interface. A modal titled 'Initiate Identity Verification' is open. It contains the following fields and elements:

- \*Mobile Phone #**: (310) 463-9056
- Enter additional comments to be sent with the Identity Verification**: A text area containing 'Hello, please use this link for your eClosing ID verification process.'
- Identity Verification Link**: <https://www.docmagic.com/esign/esign/scanVerify/g20wxj4o>
- Buttons**: 'Cancel', 'Text Identity Verification', and 'Copy Link'.

In the background, the main console shows loan details for 'LOAN', 'LENDER', and 'SETTLEMENT AGENT', a 'COUNTDOWN TO CLOSING' timer, and a table of documents.

Doc #	Doc Name	Pages	Signer(s)	Completed	Delete
3	MERS New Jersey Mortgage	15	2	✓	
4	Specific Closing Instructions	4	2	✓	
5	Occupancy and Financial Status Affidavit	3	2	✓	
6	Signature Affidavit and AKA Statement	2	2	✓	

Confirm the phone number and click Text Identity Verification.

Note: You may verify more than one participant with the same phone number. The identity verification link is unique.

\*Click on the actual icon, not the circle next to it.



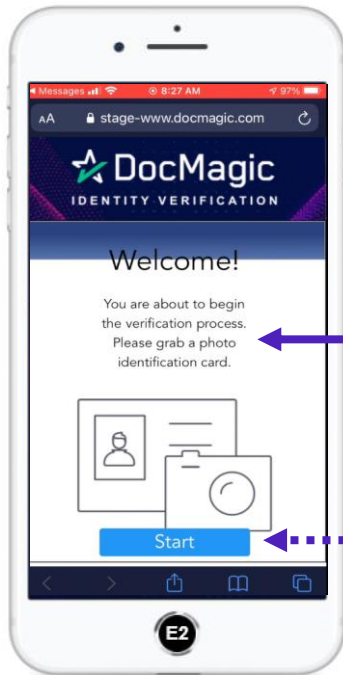
## I.D. Validation via Smart Device



The Participant will receive a text message containing a link to complete the I.D. Verification process.

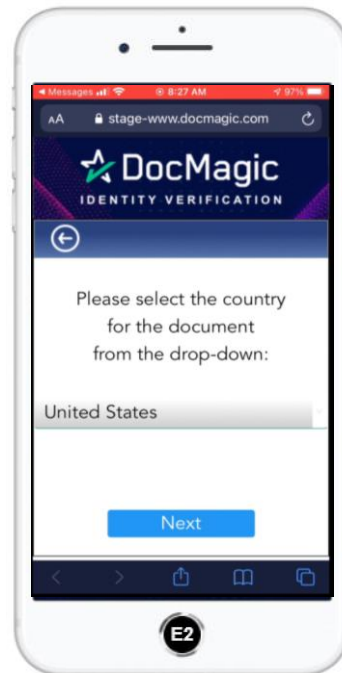


## I.D. Validation via Smart Device



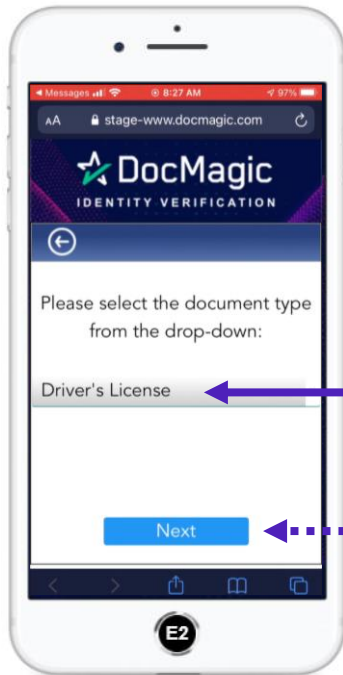
This welcome screen alerts them to retrieve a photo ID or driver's license

First, the Borrower must select the Country in which they reside.

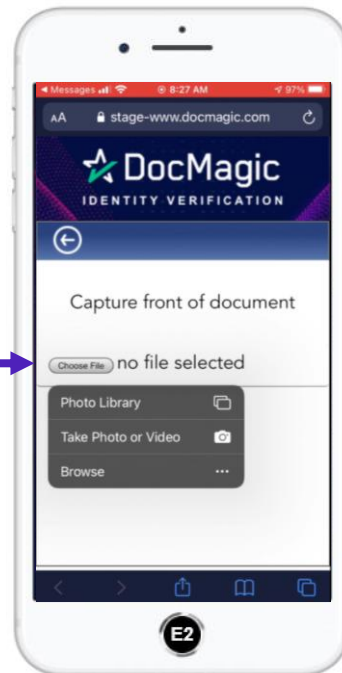




## I.D. Validation via Smart Device



The Borrower will then choose their form of I.D. from the Drop-down menu



The Borrower will then choose the I.D. or License photo as a file on their device.



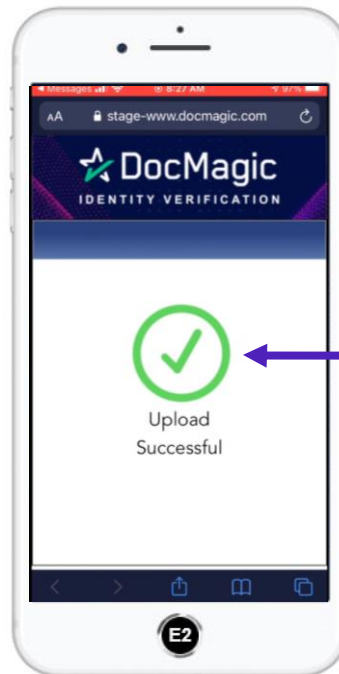
## I.D. Validation via Smart Device



The Borrower will be prompted to include both sides of the I.D.

This check mark indicates that the upload of the I.D. was successful.

The Borrower may be asked to also take a 'selfie' so the system can compare the image with the official identification.



# Verification Complete

The goal at this point is to have both circles green and checked as successful.

The screenshot displays the Docmagic console interface. At the top, a purple header bar contains the text "Close Console (Notary)" and the Docmagic logo. Below the header, the console is divided into several sections. On the left, there is a "LENDER" section with a bank icon and contact information for DSI TEST LENDER. In the center, there is a "SETTLEMENT AGENT" section with a person icon and contact information for Steve Settlement. On the right, there is a "COUNTDOWN TO CLOSING" section with a timer showing 0 days, 0 hours, 0 minutes, and 0 seconds, and a date of Oct 18, 2022 (Tue) at 12:00pm PDT. Below these sections, there is a table with columns for Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. The table has two rows: "Borrower" and "Settlement Agent". The "Settlement Agent" row shows a green checkmark in the "ID Verify / Status" column and a green dot in the "Status" column. A modal window titled "Identity (ID) Verification Results" is open in the foreground, displaying a green checkmark and the text "Signer has Passed the Identity Verification Test" with a "Confidence Score: 100%". The modal also includes a "View Report" link, a "Close" button, and an "Add ID" button. The background table shows a green checkmark in the "eSign" column for the "Settlement Agent" row. The Dell logo is visible at the bottom of the screen.

Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
Borrower	Docmagic Notary ron-test@docmagic.com	DocMagic RON 10/18/2022 - 12:00pm			Ready to Sign	<a href="#">Open Signing Room</a>
Settlement Agent						<a href="#">Open Signing Room</a>

Identity (ID) Verification Results

Signer has Passed the Identity Verification Test

Confidence Score: 100%

[View Report](#)

[Close](#) [Add ID](#)



## I.D. Verify Fail

If the I.D. Verification fails, click on the red circle. A window will appear where you can enter information related to the borrower's identity to override the failure.

**Identity (ID) Verification Results**

Signer has Failed the Identity Verification Test

Confidence Score: **0%** [View Report](#)

**Additional Verification** \*Required

\*ID Type:

\*ID Number:

\*Expiration:

**Attachments** +

No attachments added

☐ \* I have checked the signer's identification and verified that all of the information is correct

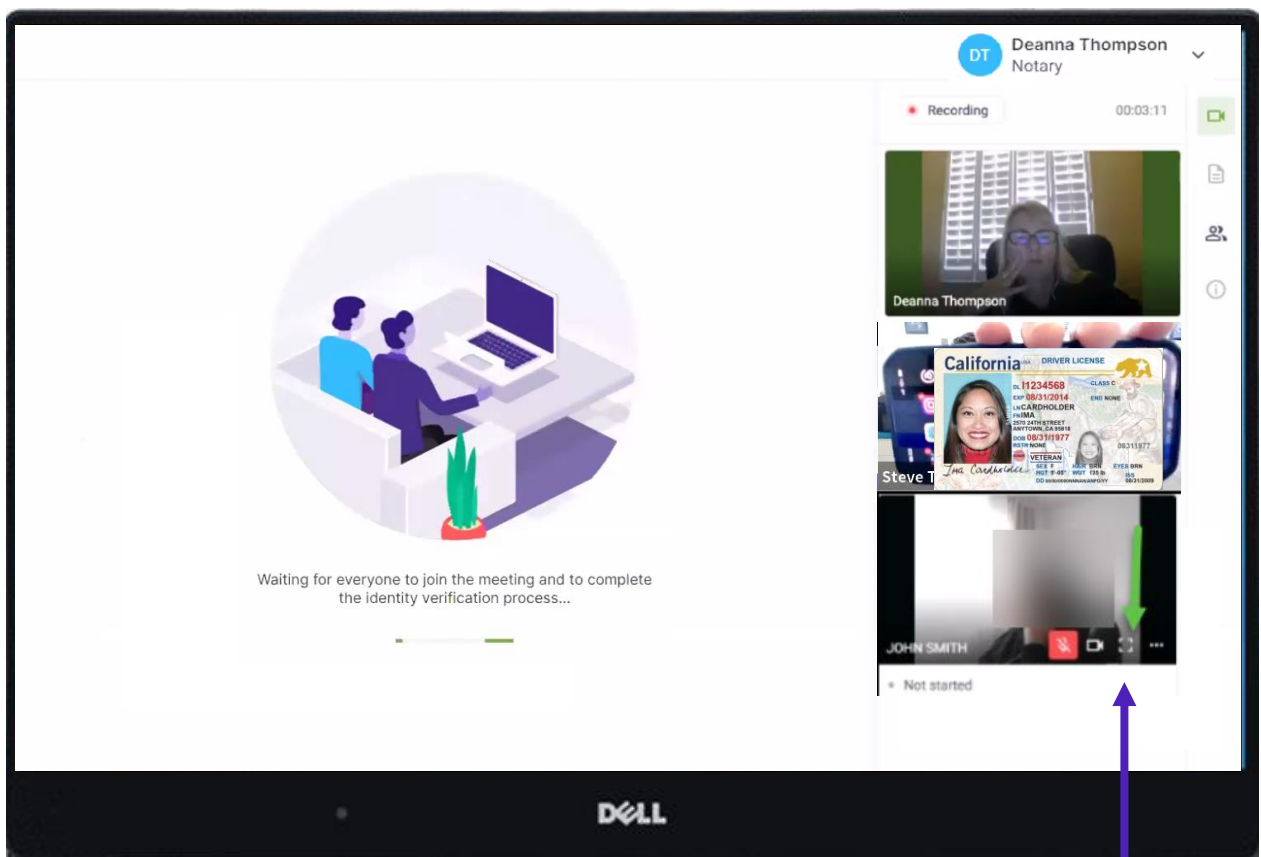
Signer(s)	Completed	Delete
1	✓	
1	✓	
2	✓	
2	✓	
2	✓	
3	✓	
2	✓	

Fill out all required fields. You have the option to attach pictures of the ID, which we recommend. Click Save when done.



## I.D. Verification Alternative

If the upload of the identification in the I.D. Verify process is rejected, you may use the video to establish proof of possession of a government issued I.D. The borrower can hold up their ID while you take a screenshot.

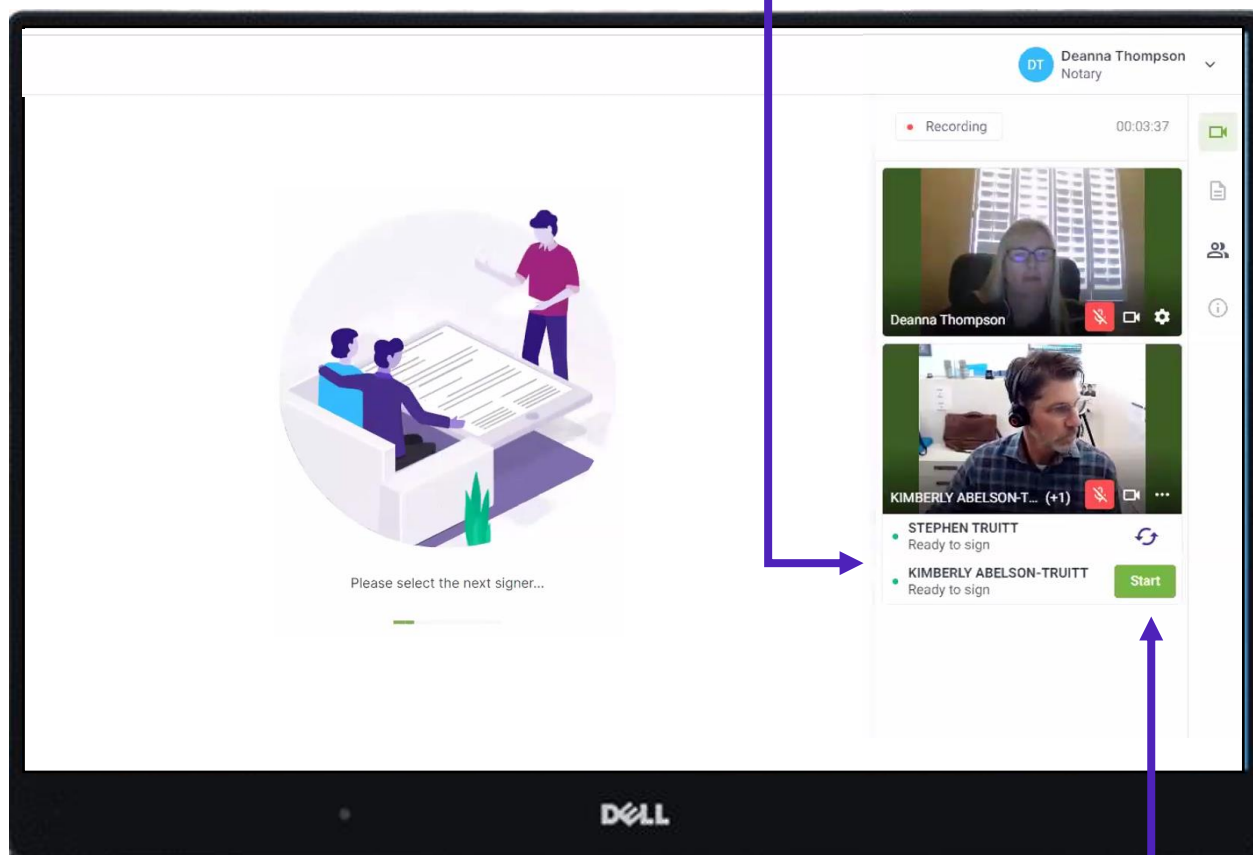


Click here to expand the borrower's camera feed to full-screen. This will make it easier to take a clear and detailed screenshot of their identification if it becomes necessary.



## Ready to Sign

Once the borrower(s) complete their KBA and ID Verify (if applicable), their status(es) will change to **Ready to Sign** and their **Start** button will illuminate indicating it is safe to begin the signing process.

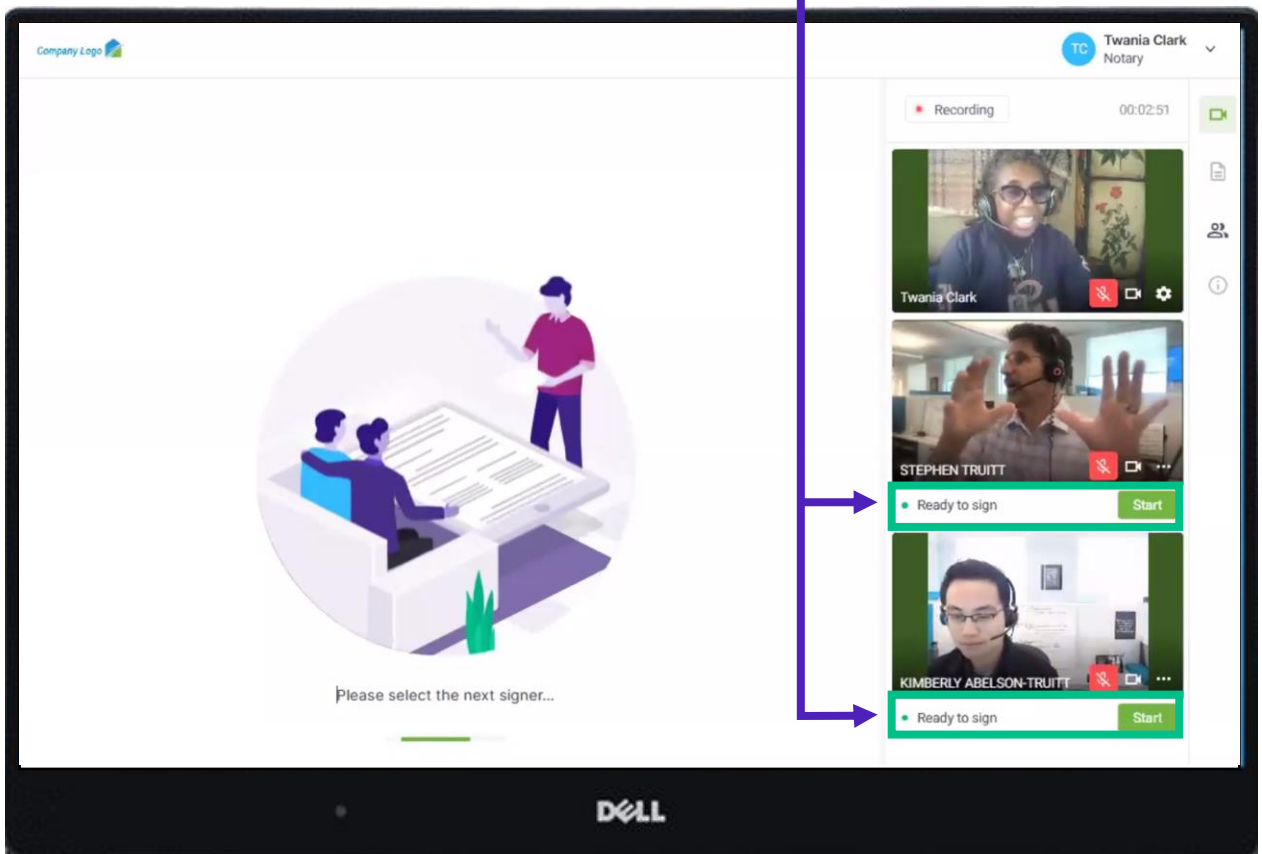


If you have more than one borrower on the same device as shown above, click on the two arrows next to their name to switch the signer that will go first. Otherwise, click Start.



## Multiple Borrowers (Different Devices)

If you have multiple borrowers on their own devices, you can pick which one will sign first.

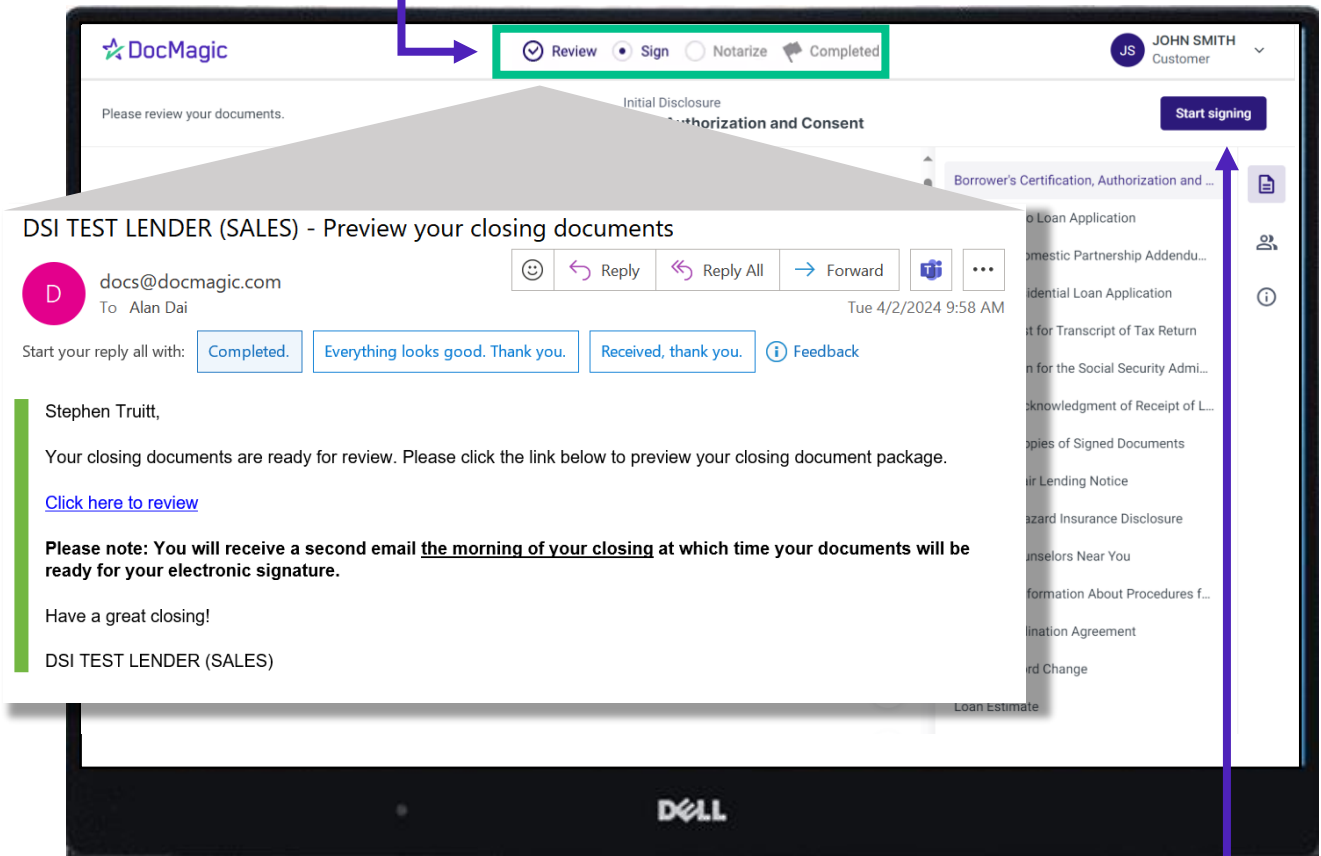


Only one signer can execute documents at a time.



# Signer's View

Along the top, the borrower will find indicators that show progress of the Review, Signing, and Notarization processes.



If the borrower is done reviewing the set of documents, they can begin the signing process by clicking here.

If Preview Mode is on, the borrower can *review* their document package, accessing it from a link that is emailed to them. We advise that the borrower reviews the documents during this period, so that they can focus on just signing during the experience.





# Signer's View

There are three options for click-signing. You as the Notary will be able to watch them sign.

## 1. Clicking the pen icon.

The screenshot shows the DocMagic interface for a borrower signing documents. At the top, there are tabs for 'Review', 'Sign' (which is selected), 'Notarize', and 'Completed'. The user is identified as 'ST STEPHEN TR Customer'. The document title is 'Closing Documents' and 'Borrower's Certification, Authorization and Consent'. The main content area contains a section titled 'BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION' with a paragraph of text and a bulleted list of four items: (i) providing an offer; (ii) originating, maintaining, managing, monitoring, servicing, selling, insuring, and securitizing a loan; (iii) as otherwise permitted by applicable laws, including state and federal privacy and data security laws; and (iv) marketing. Below this, there are two paragraphs of text. At the bottom of the document area, there is a 'Sign' button. To the left of the document area, there is a vertical toolbar with a pen icon. At the bottom of the interface, there are 'Previous', 'Sign', and 'Next' buttons. A purple arrow points from the '1. Clicking the pen icon.' text box to the pen icon in the toolbar. Another purple arrow points from the '2. Clicking on the "Sign" box directly.' text box to the 'Sign' button in the document area. A third purple arrow points from the '3. Clicking on the Green Sign box will automatically advance to the next task each time.' text box to the 'Sign' button in the bottom navigation bar.

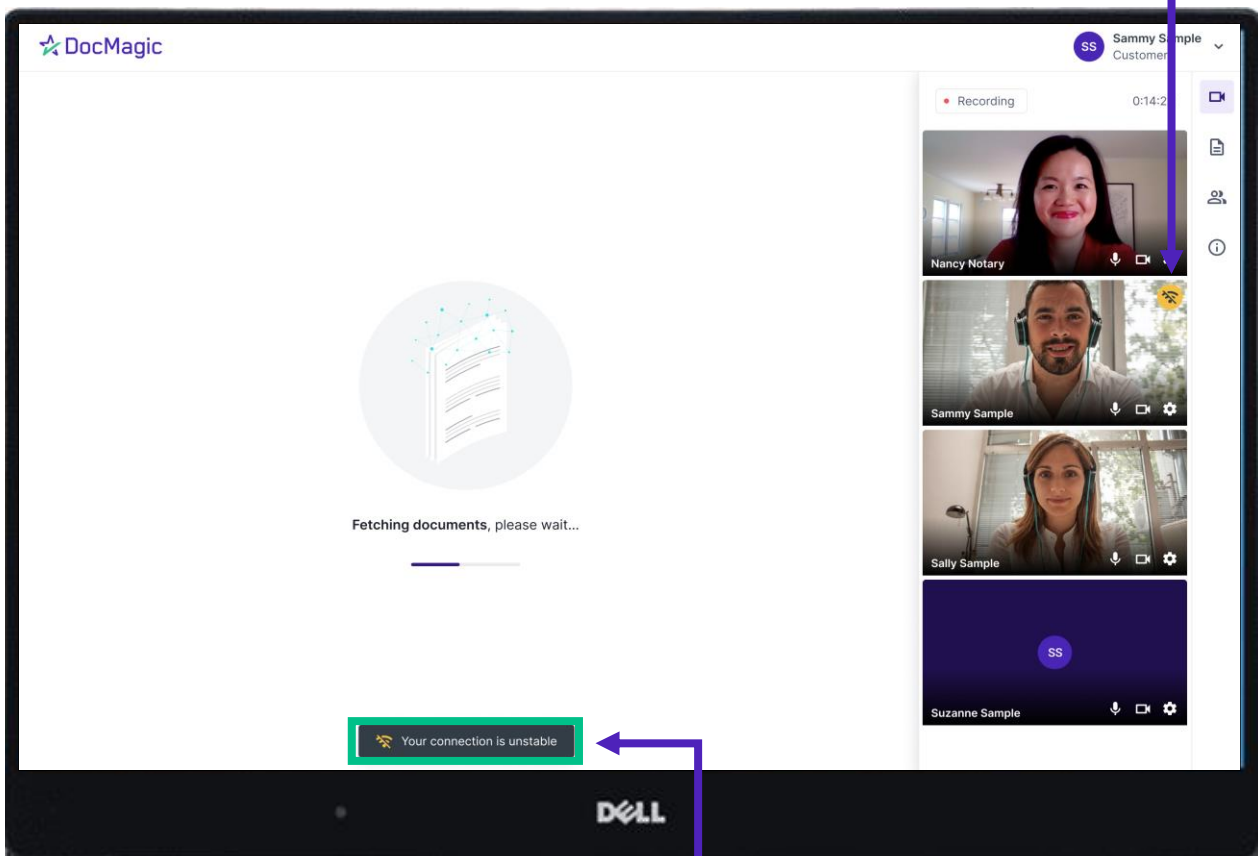
2. Clicking on the "Sign" box directly.

3. Clicking on the Green Sign box will automatically advance to the next task each time.



## Slow Connections

If a participant is experiencing a slow internet connection, you will see this  appear in the top right of their camera feed.



The participant will also see this message at the bottom of their screen. If the connection is completely lost, their screen will also grey out. In both cases, the system will try to restore the connection.



# Applying Signer eSignatures

The borrower will have the option of choosing a representation of their signature, draw their own, or upload a .png or .jpg of their signature to be used.\*

The screenshot displays a web interface for document signing. A modal window titled "Select Your Signature" is open, showing four signature options for "Stephen Truitt" with monograms "ST". The first option is selected. Below the options, a checkbox is checked, indicating ratification of the selected signature as an electronic representation. The background document is titled "Borrower's Certification, Authorization and Consent" and shows a progress bar with steps: Review, Sign, Notarize, and Completed. The "Sign" step is currently active.

They must check this box ratifying the use of their electronic signature. Once a signature is applied, the page will automatically advance to the next signature tag, Postfill box or text box.

\*Certain states and municipalities do not allow for all these selections. For example, if you are in the state of Michigan, you will only be able to choose the Draw and Upload options.



# Fixing Incorrectly Tagged Documents

If you find an improperly tagged document during the signing experience, you can still edit the document by making those changes here.

**DocMagic eClosing Console (Notary)**

**LOAN** Loan #: 163648196291  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 163648196291 (...)




**LENDER** Company: SAMPLE SONS L...  
Contact: Michael Morford  
Email: mikem@docmagic.com  
Phone: (555) 555-5555

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: strutt@docmagic.com  
Phone: (987) 555-4321

**COUNTDOWN TO CLOSING**  
DATE: Apr 18, 2023 (Wed) Time: 12:00am PDT  
Edit

**Signers (3)**

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	John Smith strutt@docmagic.com	Borrower	Doc Magic ron-test@docmagic.com	DocMagic RON 11/9/2021 - 12:00am	✓ ○	✓ ○	● Not Started	Open Signing Room
2	Oliver Originator oliver.originator@gmailat...	Originator					● Ready to Sign	Open Signing Room
3	Sally Settlement strutt@docmagic.com	Settlement Agent					● Ready to Sign	Open Signing Room

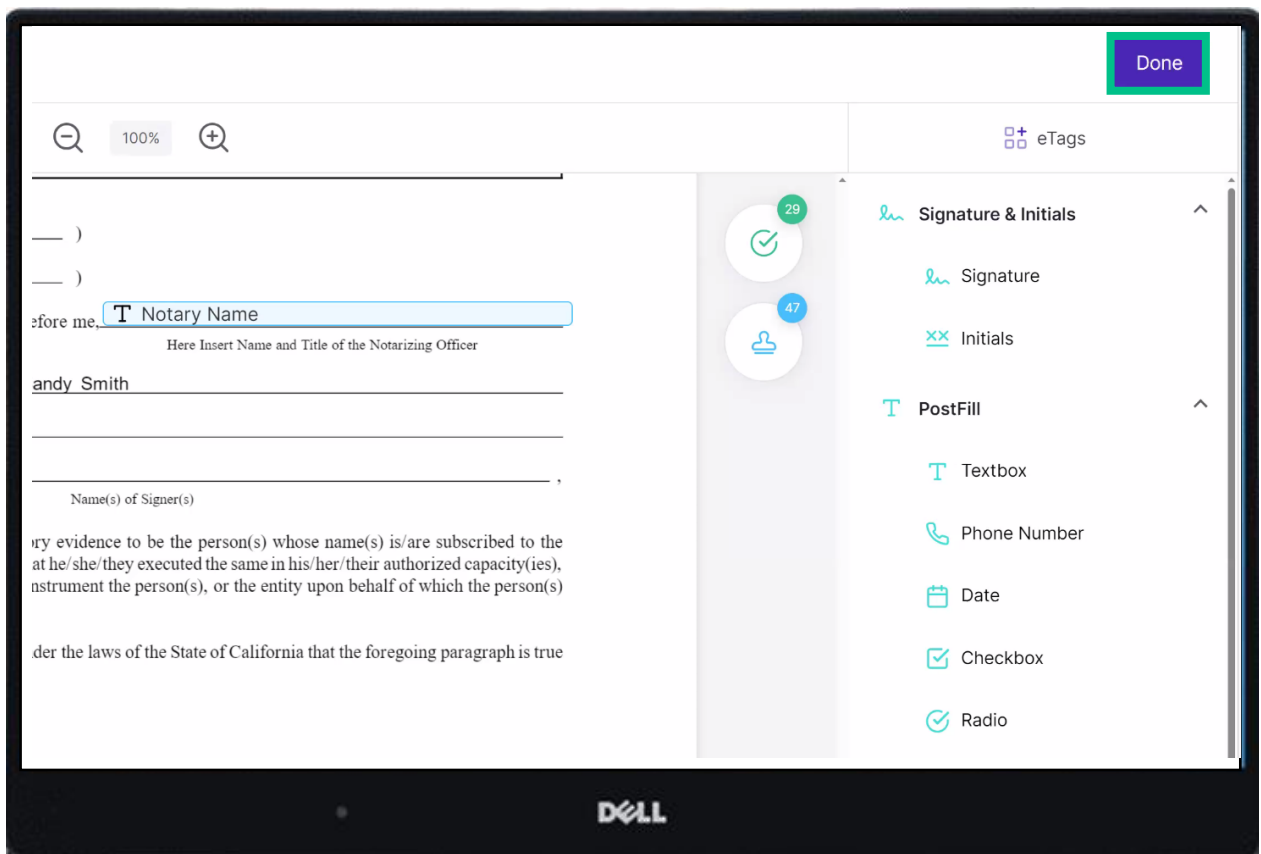
**Documents (6)**    Preview Mode ☐ OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	✓	
2	Multistate Fixed Rate Electronic Note	4	1	✓	
3	MERS New Jersey Mortgage	15	2	✓	
4	Specific Closing Instructions	4	2	✓	
5	Occupancy and Financial Status Affidavit	3	2	✓	
6	Signature Affidavit and AKA Statement	2	2	✓	



# Fixing Incorrectly Tagged Documents

When finished, click "Done" to return to the portal.

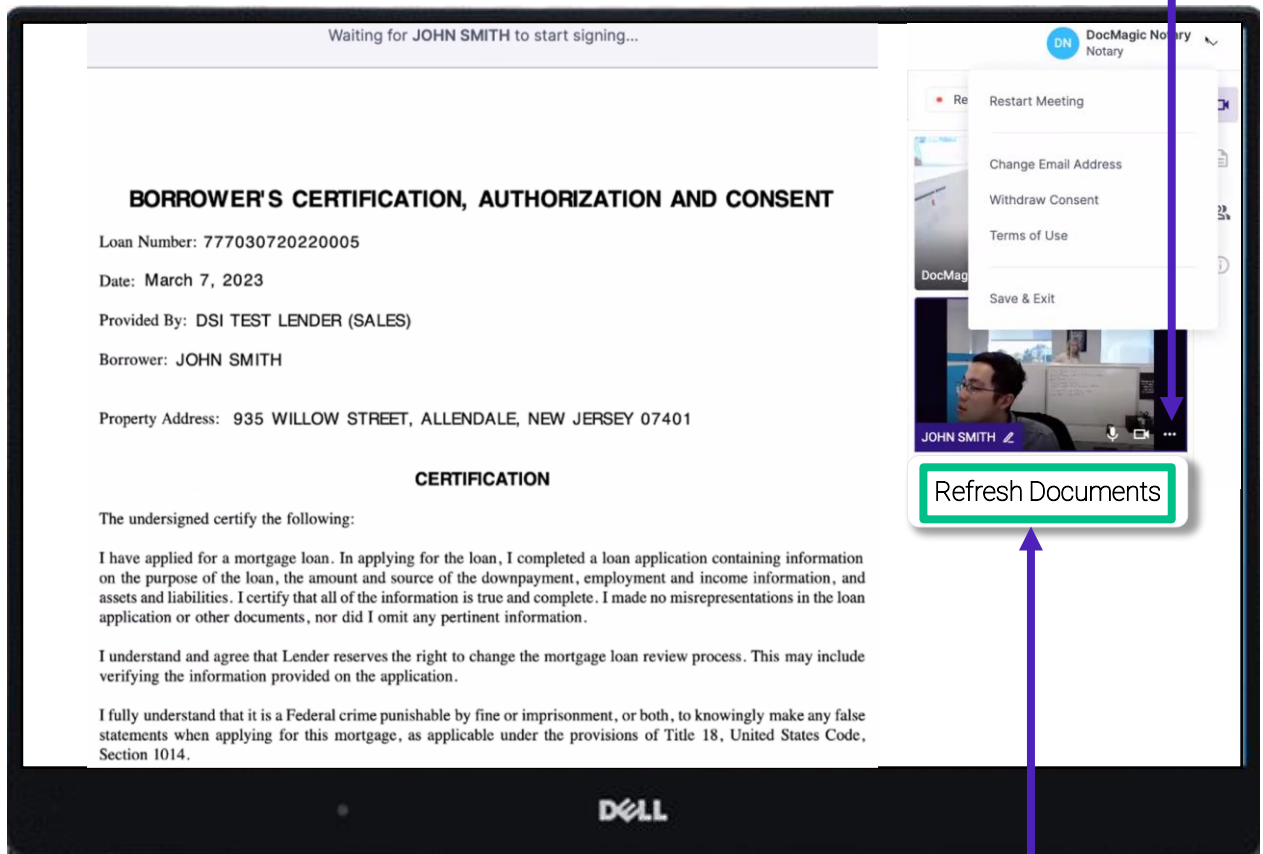


The screenshot shows a document editing interface. At the top right, a green "Done" button is highlighted with a green border. A purple arrow points from the text box above to this button. The interface includes a search bar with a magnifying glass icon and a "100%" zoom level. Below the search bar, there are two circular icons: a green checkmark with a "29" badge and a blue person icon with a "47" badge. The main document area contains text fields and a "Notary Name" field with a blue highlight. To the right, there is a sidebar with a "eTags" section containing "Signature & Initials" (with sub-items "Signature" and "Initials") and a "PostFill" section (with sub-items "Textbox", "Phone Number", "Date", "Checkbox", and "Radio"). The Dell logo is visible at the bottom center of the screen.



# Refresh Documents

Go back to the signing experience. Click the three dots at the bottom right of the borrower's screen.



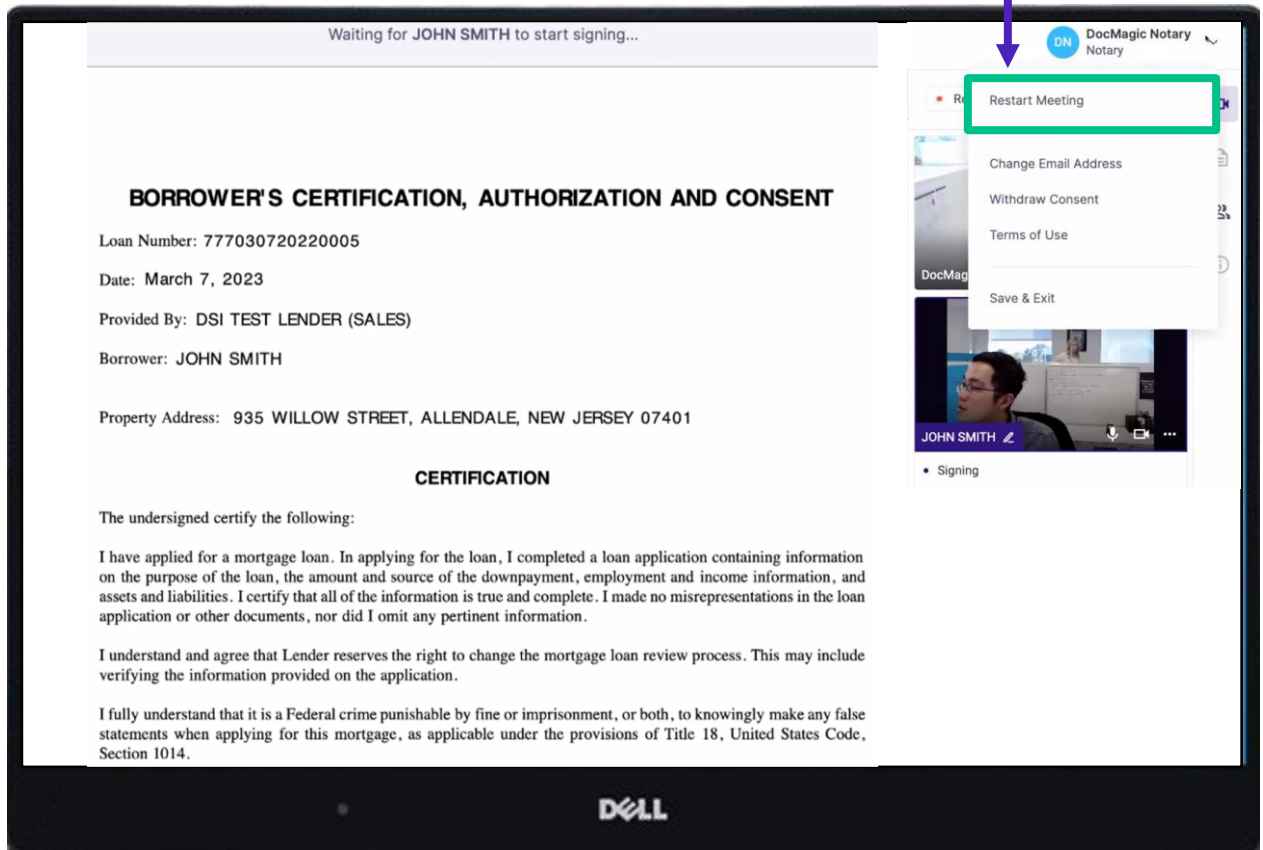
Click Refresh Documents.  
Your changes should show.

In the signing experience, if the borrower's screen freezes after they apply their first signature, try refreshing their documents.



## Restart Meeting

If that doesn't work, you'll need to restart the meeting for the changes to take effect. From the signing experience, click your name in the top right, then Restart Meeting.



If repeated technical glitches occur, try [clearing browser cache](#) or running the experience in an [incognito window](#).



# Applying Signer eSignatures

When the borrower is done signing, they must click Done and then Continue to set you up for Notary signatures.

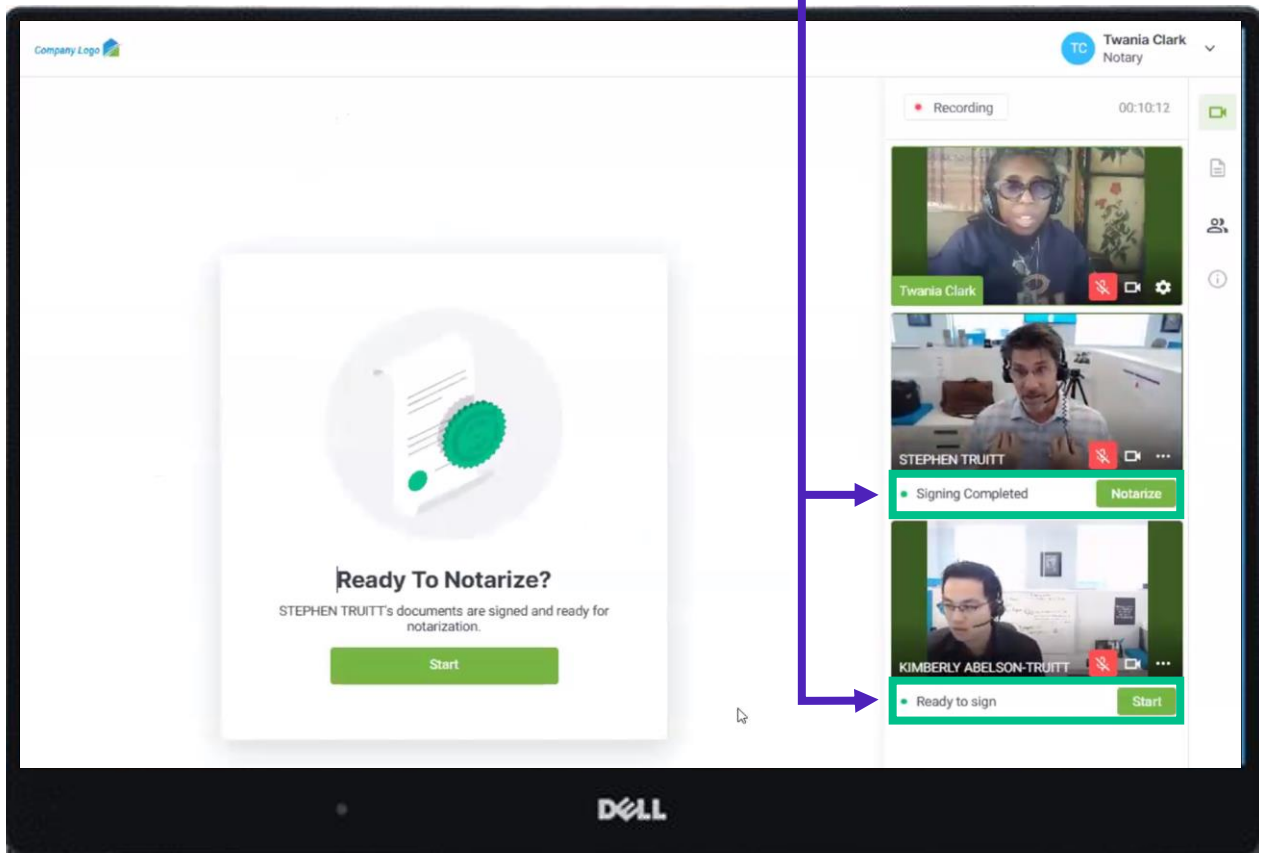
The screenshot shows a web-based document signing interface. At the top, there is a progress bar with four steps: Review (checked), Sign (checked), Notarize (unchecked), and Completed (disabled). The user's name, STEPHEN TRUITT, and role, Customer, are displayed in the top right corner. The document title is "Closing Documents" and "Signature Affidavit and AKA Statement". A "Done" button is located in the top right corner of the document area. A modal window is centered on the screen with the title "Time to Notarize!". The modal contains a graphic of a document with a blue seal and the text: "All documents signed! The notary will take it from here and complete the notarization process." Below this text is a "Continue" button. At the bottom of the modal, there is a status bar that says "All documents signed" with a green checkmark icon. The background document shows fields for "INITIAL ESCROW ACCOUNT DISCLOSURE STATEMENT", "SIGNATURE", and "Name Variation (Print)".





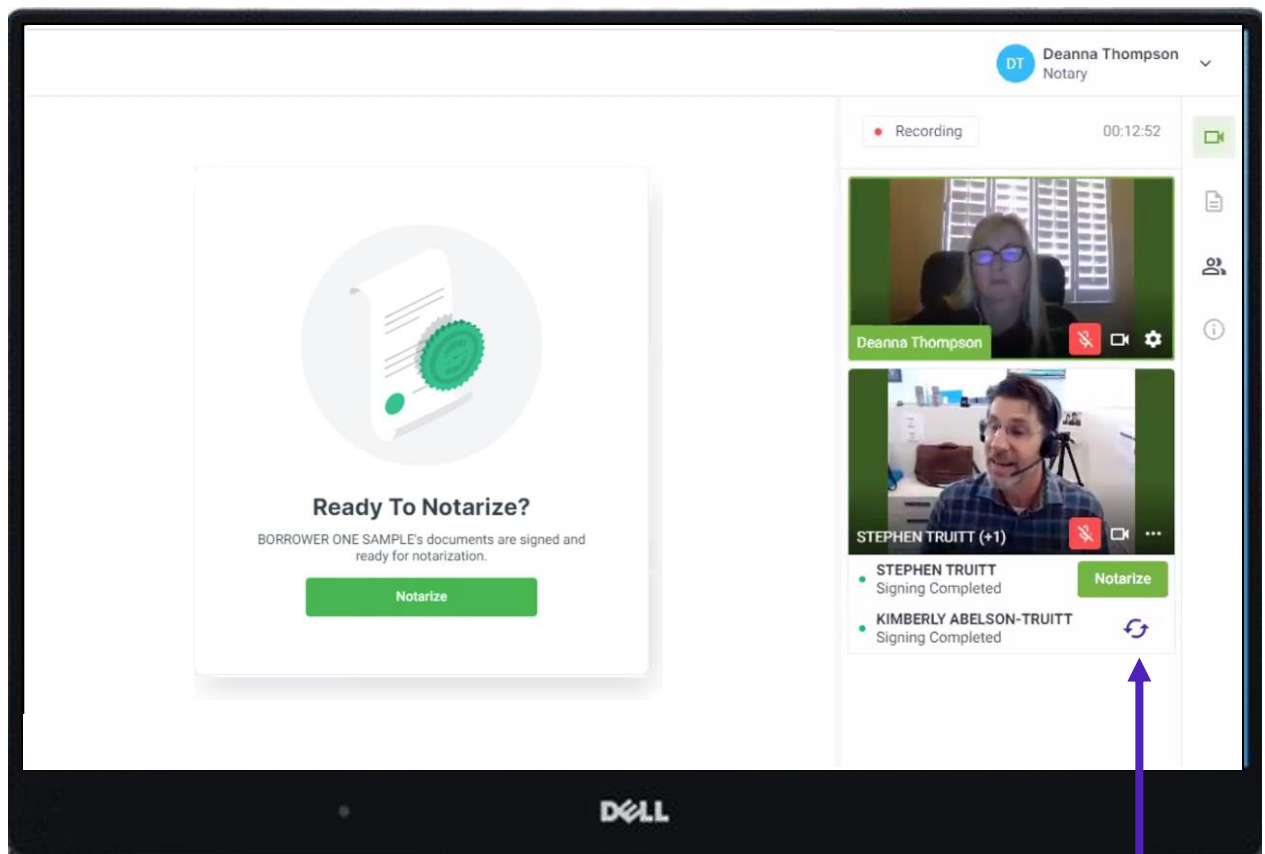
## Multiple Borrowers (Different Devices)

If you have multiple borrowers on their own devices, you can choose if you want the other signer to sign first, or if you want to notarize the first signer's documents and then return to the other signer.



# The Notarization Process

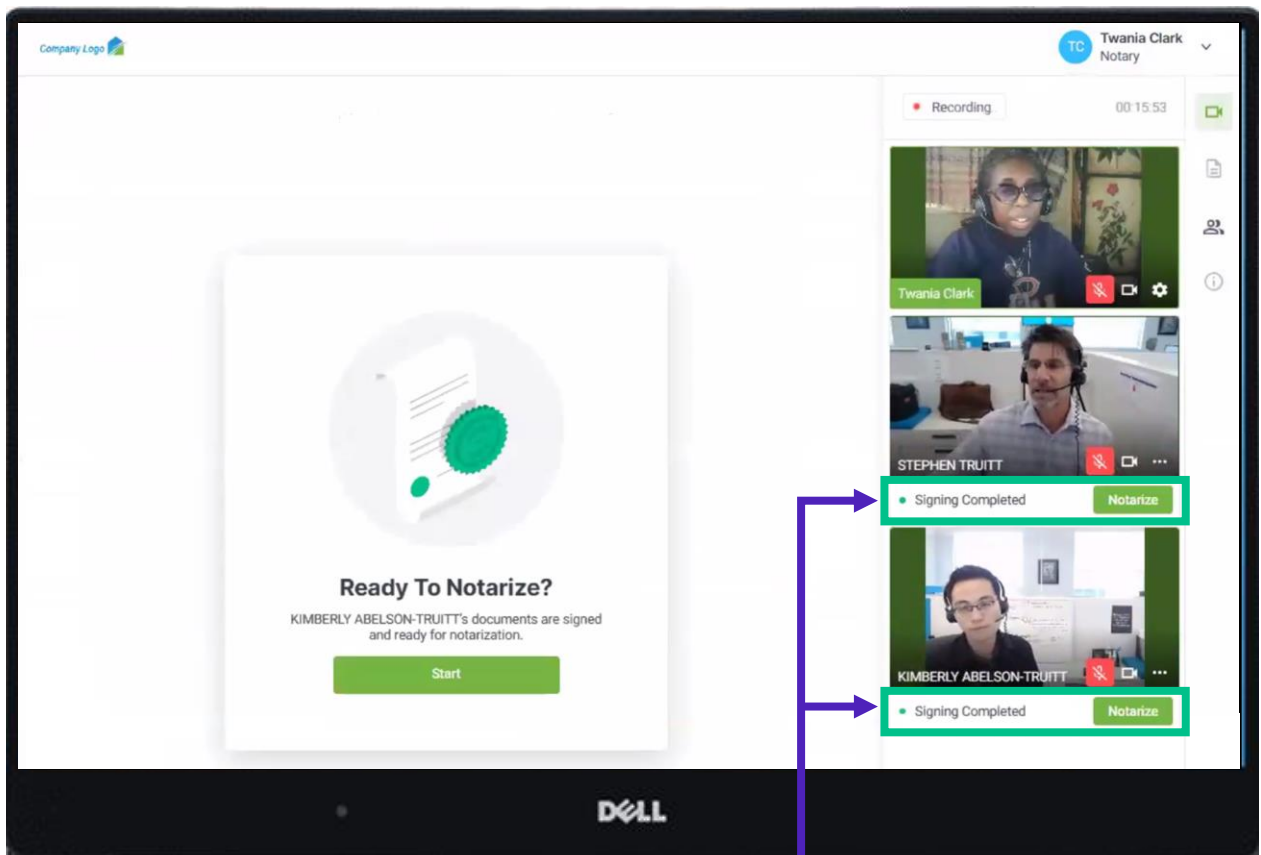
Now, control and signing ability is transferred to the Notary. You will now start the notarization process.



If you have multiple borrowers on the same device, you can choose who goes first.



# The Notarization Process

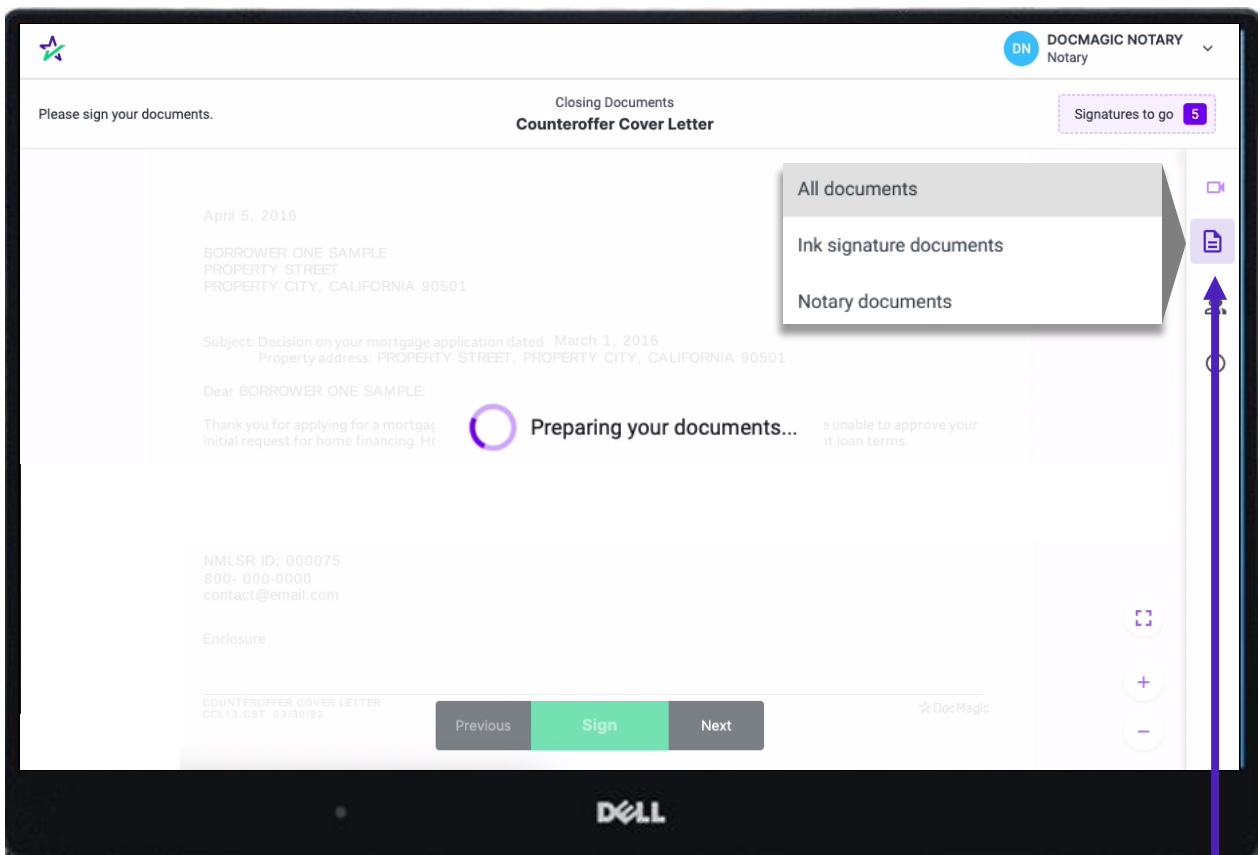


If you have borrowers on multiple devices, you can also choose who you want to notarize first.



## Preparing Your Documents

After you select Notarize, you will see this “Preparing your documents” loading screen. You will automatically be brought to the first document that needs to be notarized.



By default, only the documents that need to be notarized will be loaded during this phase. If you want to render all documents, you can select that from the documents section here.



## Add Your Signature, Seal, and more

When you click on the signature line, your signature and any other pertinent data, such as your Notary seal, will be automatically inserted.

Closing Documents  
**Signature Affidavit and AKA Statement**

State of Arizona  
County of Maricopa

Signed and sworn to (or affirmed) before me on the 28th day of March, 2024  
by STEPHEN TRUITT

This remote online notarization involved the use of communication technology.

*Deanna Thompson*  
03/28/24 10:42:28 AM PDT  
Signature of notarial officer  
Deanna Thompson  
Notary Public  
Title of office  
My commission expires: \_\_\_\_\_

**DEANNA THOMPSON**  
Notary Public - State of Arizona  
Maricopa County  
Commission # 617152  
My Commission Expires on Oct 27, 2025  
(Stamp)

All documents notarized ✓

We recommend that you don't scroll during this part of the signing experience. The system will move for you. After you fill in any line of text, hit enter and you'll automatically be taken to the next task.

Middle names are now supported for notaries. If you find a discrepancy on how your middle name or initial should be displayed, please contact Secure Insight.



# Notarize Without Borrower's Presence

In certain cases, you can notarize the documents outside of the RON meeting if the borrowers have signed all required documents.

The screenshot displays the DocMagic Notary console interface. At the top, there are tabs for 'Details', 'eJournal', and 'Action Log', along with a 'Start eClosing' button. The 'Signers (4)' section lists four participants with their roles, notary information, and signing status. A red arrow points to the 'Notarize' button in the 'eSign' column for the first signer, 'Borrower O Sample'. The 'Documents (46)' section below shows a list of documents with columns for 'eSign Enabled', 'Page(s)', 'Signer(s)', and 'Completed'.

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Borrower O Sample youssef@docmagic.com	Borrower	Docmagic Notary youssef@docmagic.com	DocMagic RON 10/18/2024 - 5:00am			Signing - Complete	<button>Notarize</button>
2	Borrower T Sample youssef@docmagic.com	Borrower	Docmagic Notary youssef@docmagic.com	DocMagic RON 10/18/2024 - 5:00am			Finished	<button>Open Signing Room</button>
3	Contact Here contact@email.com	Originator					Ready to Sign	<button>Open Signing Room</button>
4	Youssef Aissa youssef@docmagic.com	Settlement Agent					Ready to Sign	<button>Open Signing Room</button>

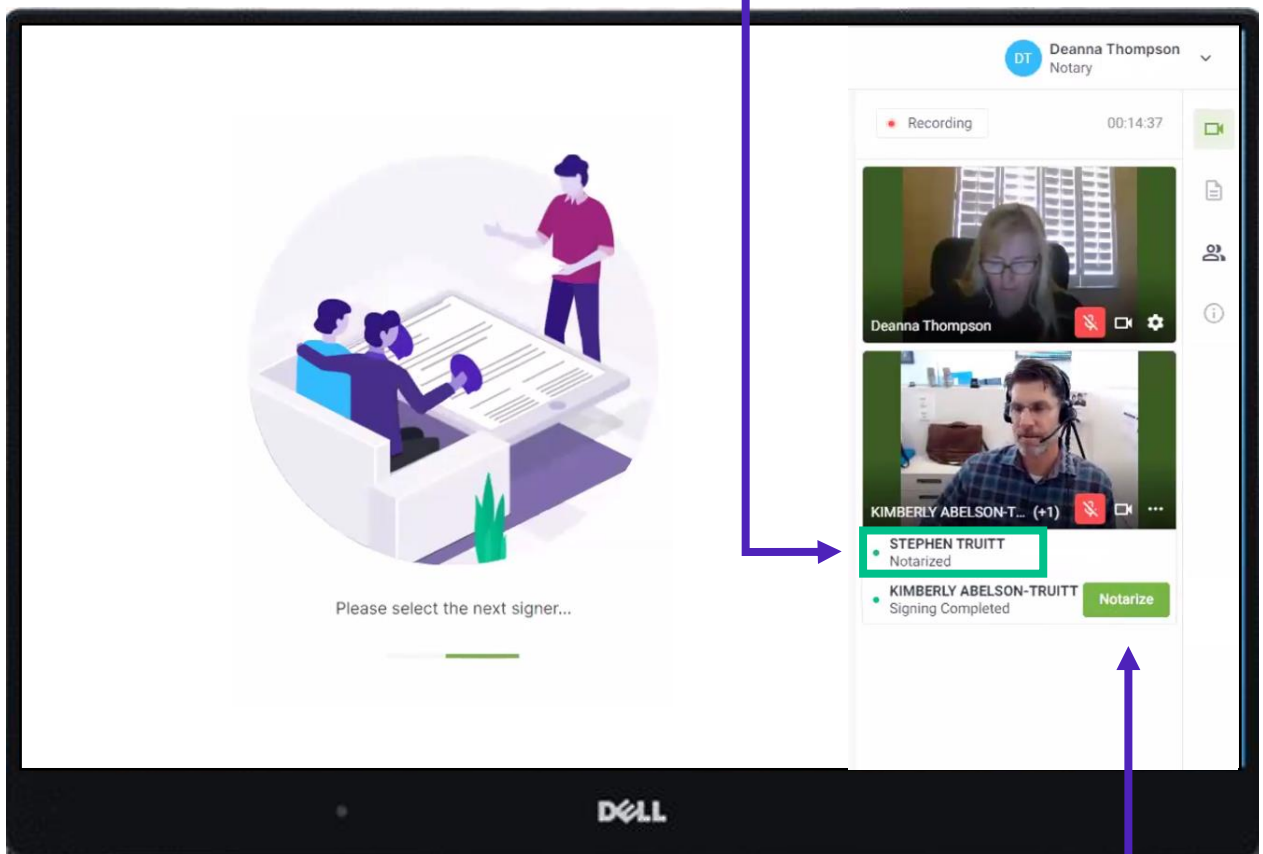
#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Counteroffer Cover Letter	1	0	
2	Counteroffer Cover Letter	1	0	
3	Trust Certification - Instructions and Definitions	2	0	
4	Uniform Residential Loan Application	8	2	
5	Uniform Residential Loan Application	8	2	
6	California Deed of Trust (MERS)	20	4	
7	General Closing Instructions	2	0	

This "Notarize" button will appear in your Notary console by the borrower's name if all criteria are met.



## Notarized

Once the first signer is finished, you'll see the status change to Notarized.

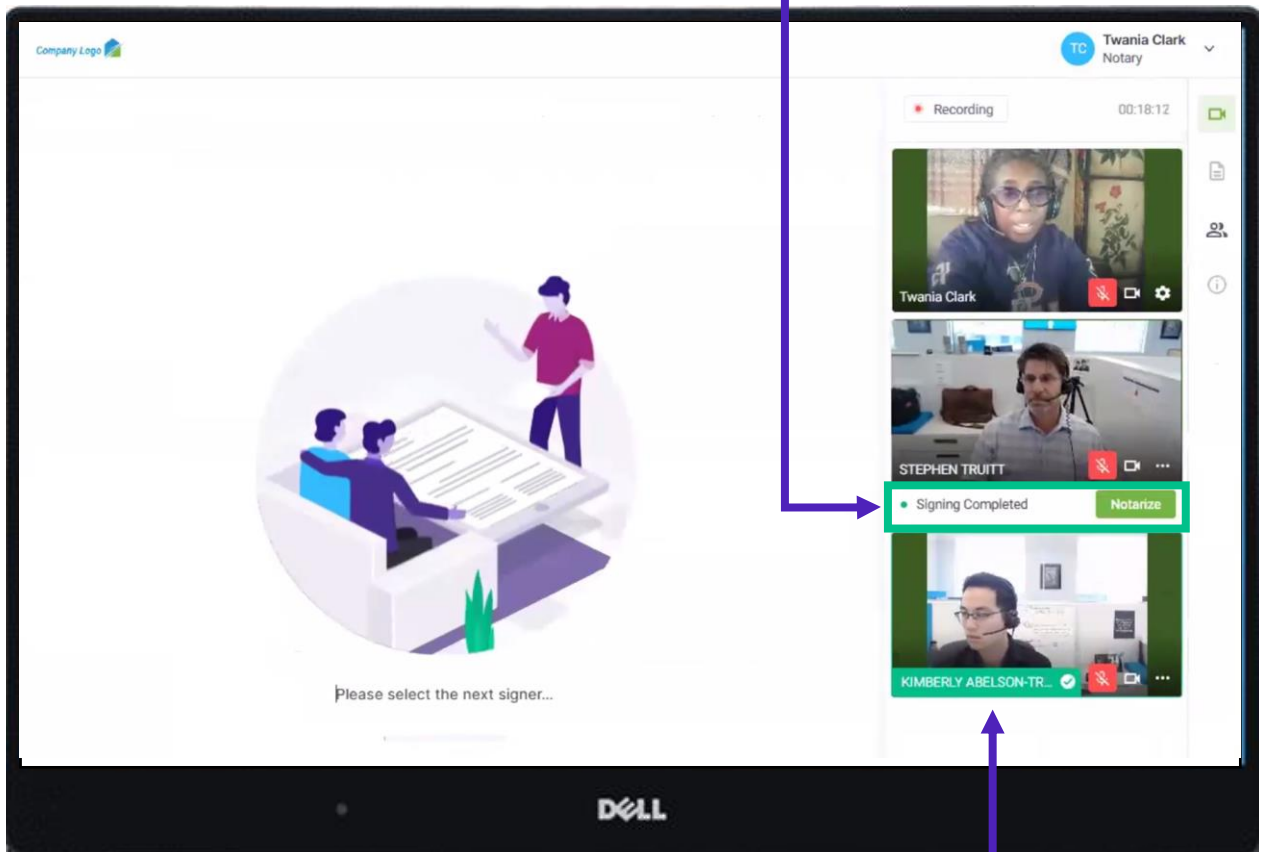


...and you can then repeat the process for the next Signer by clicking their Notarize button. You must do this for all Signers one at a time.



# Notarized

Here's what that looks like if you have multiple borrowers on different devices.



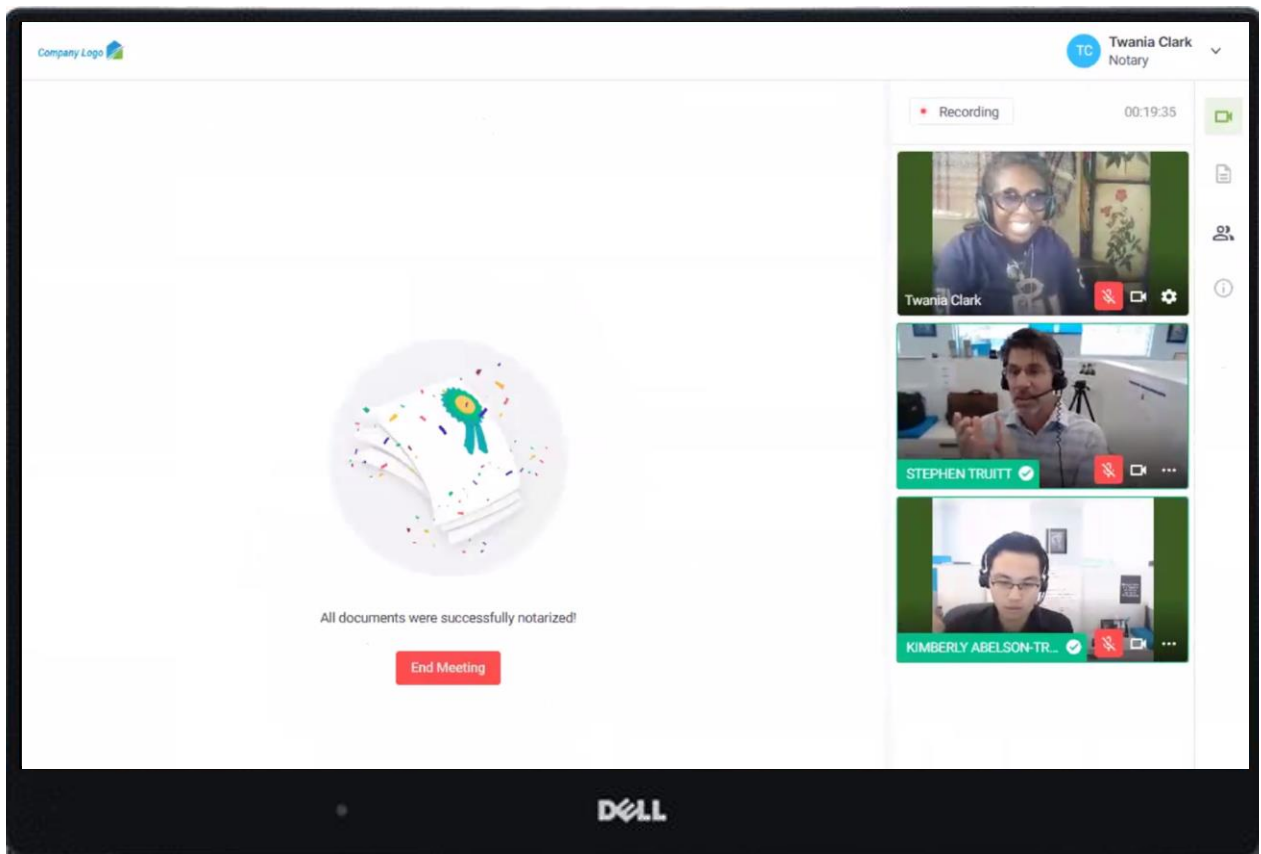
You can see that the completed participant has a green band and check mark over their name.





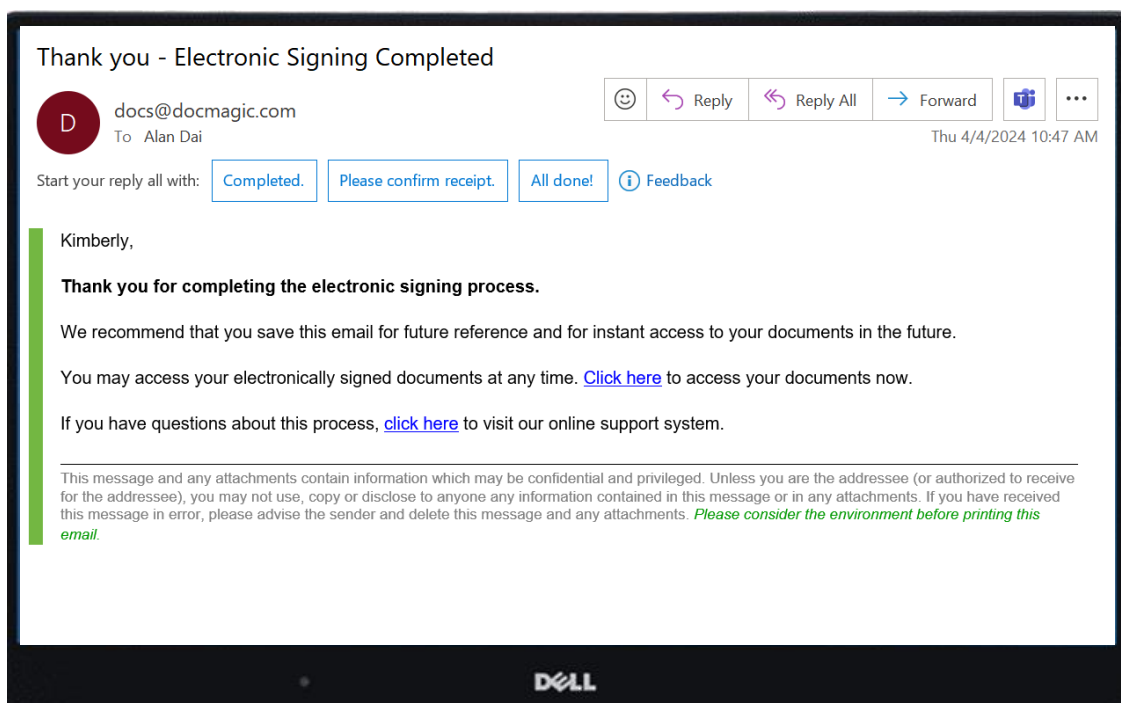
## Ending the Meeting

The process is complete once all the participants' and Notary's signatures have been captured. The meeting may now end.



# Email Confirmation

Notification emails are sent to all parties.



The email will allow the Borrower to download their signed and notarized document package from a provided link.



CONGRATULATIONS!

Back on the Notary eClose Console, click on this tab to access the eJournal.

DocMagic eClose Console (Notary) Who can see your viewing activity? X Doc

**LOAN** Loan #: 16364819162  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 16364819162

**LENDER** Company: SAMPLE SONS L...  
Contact: Michael Morford  
Email: mikem@docmagic...  
Phone: (555) 555-5555

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: struitt@docmagic.c...  
Phone: (987) 555-4321

**CLOSING COMPLETED** Congratulations!

Details **eJournal** Action Log

**Journal**

#	Signer	Notarization Date and Time
1	John Smith	November 9, 2021 • 10:32am PST

**Recordings**

#	File	Date Recorded
1	417659_2021-11-09T18:27:54.132Z.mp4	November 9, 2021 • 10:27am PST

Click on the down arrow to access the borrower's journal.



# eJournal

Use the dropdown menus to select the type of Notarial Service. Toggle choices by clicking on the box and using the up and down arrow keys.

The screenshot shows the DocMagic eClose Console (Notary) interface. The top navigation bar includes the DocMagic logo, the title "eClose Console (Notary)", a user profile icon, and a dropdown menu labeled "Doc". Below the navigation bar, there are four main sections: LOAN, LENDER, SETTLEMENT AGENT, and CLOSING COMPLETED. The LOAN section displays details for Loan # 1636481916201, Primary Borrower John Smith, Type EClosing, Package ID 417659, and Worksheet # 1636481916201. The LENDER section displays details for Company SAMPLE SONS L..., Contact Michael Morford, Email mikem@docmagic.com, and Phone (555) 555-5555. The SETTLEMENT AGENT section displays details for Company Settlement Closing..., Contact Sally Settlement, Email struitt@docmagic.com, and Phone (987) 555-4321. The CLOSING COMPLETED section displays a green checkmark icon and the text "Congratulations!". Below these sections, there are three tabs: Details, eJournal, and Action Log. The eJournal tab is selected, and the Journal section is displayed. The Journal section shows a table with columns for Signer and Notarization Date and Time. The first row shows John Smith on November 9, 2021 at 10:32am PST. Below the table, there are three sections: Signer's Details, Document Notarized, and Notarial Service. The Signer's Details section includes John Smith's contact information and a signature field. The Document Notarized section lists the documents being notarized. The Notarial Service section is a table with columns for Notarial Service and Fee. The table contains three rows: Acknowledgement (\$30.00), Jurat (\$45.00), and Affidavit (\$10.00). A green box highlights the Notarial Service dropdown menus and the Fee input fields. A purple arrow points from the instruction text to the dropdown menus. Another purple arrow points from the instruction text to the Save button.

Signer	Notarization Date and Time
1 John Smith	November 9, 2021 • 10:32am PST

Signer's Details	Document Notarized	*Notarial Service	Fee
John Smith 222333 Peachtree Place Atlanta, GA 30318  Contact Information Mobile: (800) 649-1362 Home: (800) 649-1362 struitt@docmagic.com  Signature <i>John Smith</i>  Identification Details Driver's License: 123456789 • Exp. 2/20/2025	MERS New Jersey Mortgage Nov 9, 2021 • 10:32am PST  Occupancy and Financial Status Affidavit Nov 9, 2021 • 10:32am PST  Signature Affidavit and AKA Statement Nov 9, 2021 • 10:32am PST	Acknowledgement Jurat Affidavit	\$30.00 \$45.00 \$10.00

Cancel Save

Enter the fee for each Notarial Service performed here.



# eJournal

The notary journal contains the audio and video of each RON signing session.

The screenshot displays the DocMagic eClose Console (Notary) interface. At the top, there's a purple header with the DocMagic logo and navigation links. Below the header, a navigation bar includes 'Details', 'eJournal', and 'Action Log'. The 'eJournal' section is active, showing a table of notary sessions. The first session is for John Smith, dated December 15, 2021, at 1:40pm CST. The session details include the signer's information, document notary details, notarial service type (Acknowledgement and Affidavit), and fees. A signature of John Smith is visible. Below the session details, there's a 'Recordings' section with a table of recorded files. The first recording is a file named '437477\_2021-12-15T19:35:38.012Z.mp4', recorded on December 15, 2021, at 1:35pm CST. A green box highlights the 'Download' button next to the recording file.

#	Signer	Notarization Date and Time
1	John Smith	December 15, 2021 • 1:40pm CST

Signer's Details	Document Notarized	*Notarial Service	Fee
John Smith 22 33 PEACHTREE PLACE ATLANTA, GA 30318 Contact Information Mobile: (562) 652-2578 Home: (502) 767-8509 smithj@docmagic.com Signature John Smith Identification Details Driver's License: 123456 • Exp. 4/14/2022	MERS New Jersey Mortgage Dec 15, 2021 • 1:38pm CST Signature Affidavit and AKA Statement Dec 15, 2021 • 1:40pm CST	Acknowledgement Affidavit	\$0.00 \$0.00

#	File	Date Recorded
1	437477_2021-12-15T19:35:38.012Z.mp4	December 15, 2021 • 1:35pm CST

The best practice would be to store these materials right after the signing experience. Click here to download.



# Action Log

Click here to see the Action Log. This tab shows the actions that everyone involved in the process has taken, and when.

The screenshot displays the DocMagic eClose Console (Notary) interface. At the top, there's a purple header with the DocMagic logo and navigation tabs: LOAN, LENDER, SETTLEMENT AGENT, and CLOSING COMPLETED. The LENDER tab is active, showing details for 'SAMPLE SONS L...'. Below the tabs, there's a navigation bar with 'Details', 'eJournal', and 'Action Log' (highlighted with a green box). The Action Log table lists various events, including eSign event creation, invitation sending, and document signing. At the bottom, there's a text input field and a button labeled 'Add Internal Note To Action Log'.

Date & Time (PST)	User Name	IP Address	Description
3/24/21 5:06 PM	System User		eSign event created
3/24/21 5:06 PM	Erica Sample		Invitation sent to erica.sample@example.com
3/24/21 5:06 PM	Sally Settlement		Invitation sent to sally.settlement@example.com
3/24/21 5:11 PM	System User		Date: 2021-03-24 17:11:04 InkSign Fax received for document: 3596363 ()
3/24/21 5:11 PM	Erica Sample		Multistate Fixed Rate Note signed by Erica Sample
3/24/21 5:12 PM	Sally Settlement	172.16.1.98	Document AZACPRS.TTL.pdf added to package

You may also add notes at the bottom.

