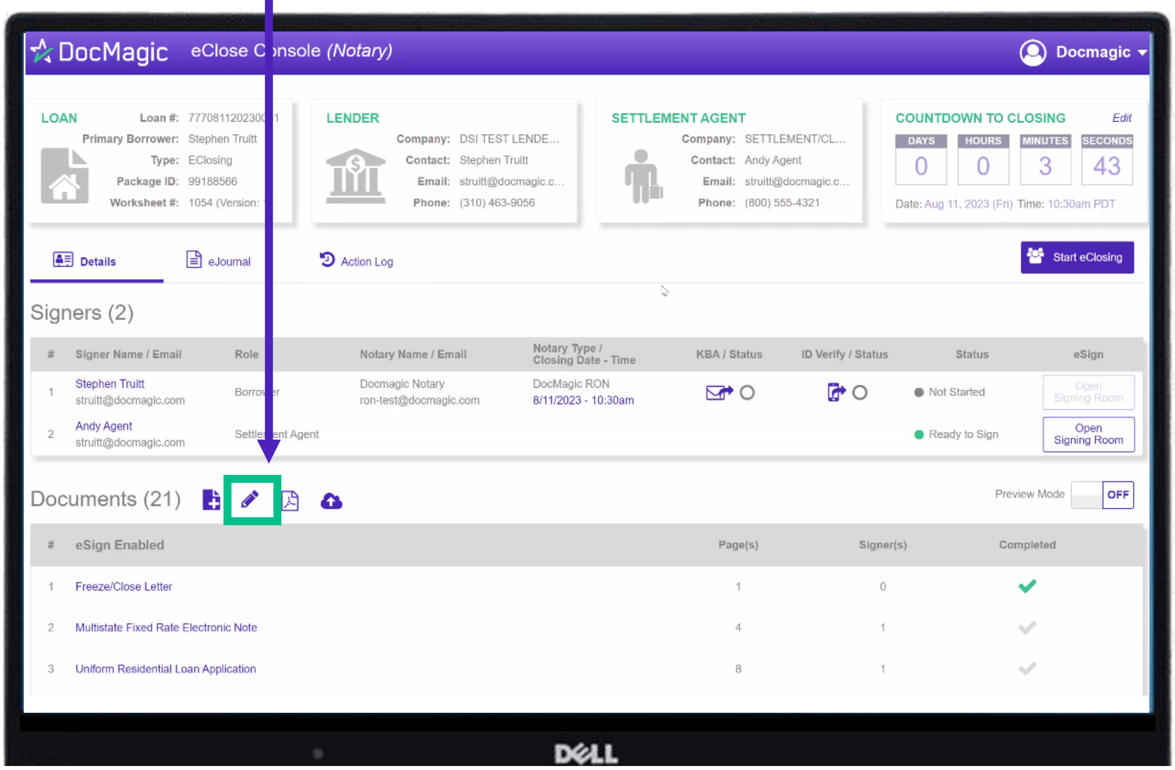
DocMagic

Tagging Documents With Document Editor

Tagging Documents

Getting Started in the eClose Console

Start by clicking on the pencil icon in your eClose Console to open the tagging experience in another tab.

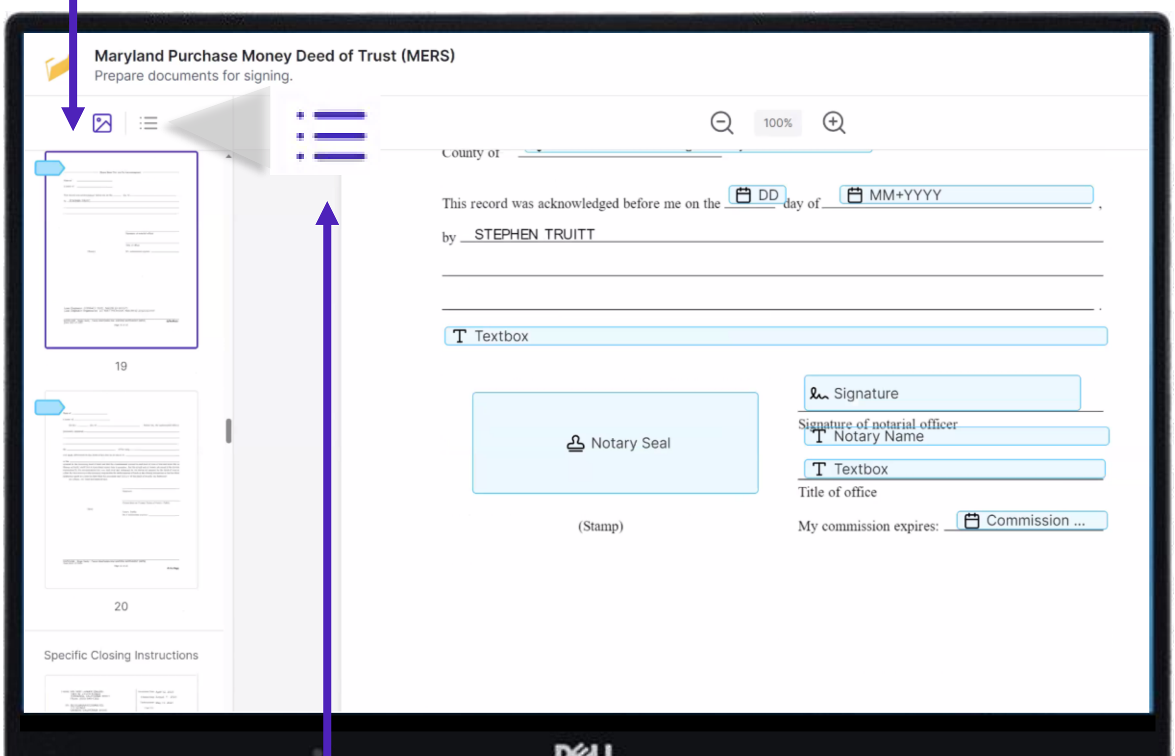


We strongly recommend that each notary clicks on the pencil and goes through all the tags a few hours prior to the signing.

Tagging Documents

Left Column / Document List

If you need to find a specific document, you may scroll through the column on the left.

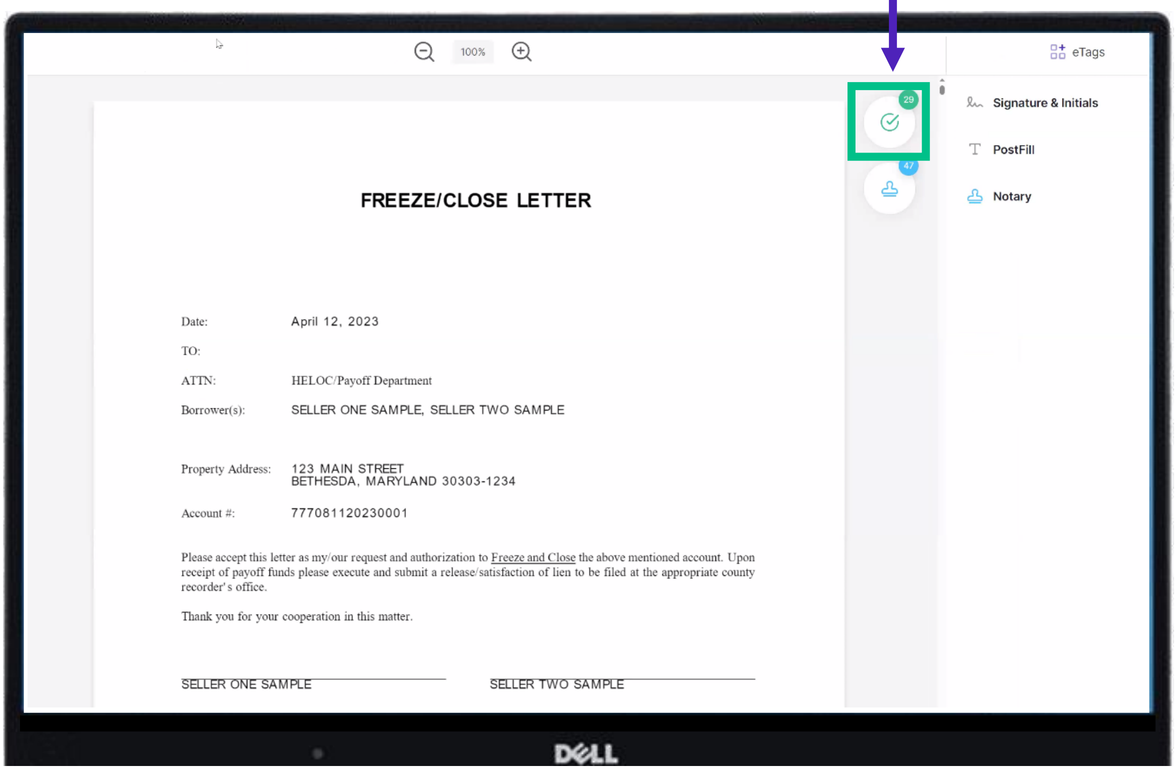


Click the icon with three dots and three lines to switch to a list of all the documents.

Tagging Documents

Checking Tags (Participants)

When the document editor first opens, we suggest that you go through all the borrower's tags. That can be done by clicking on this green circle.

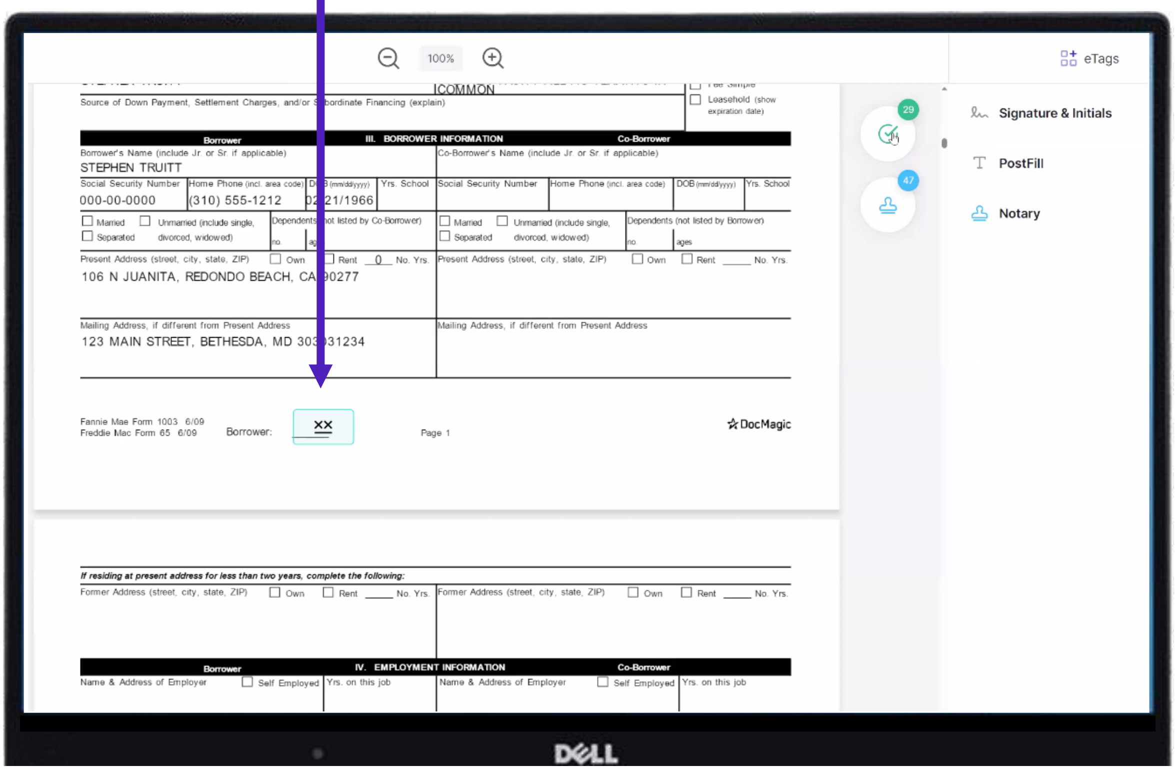


The green circle will take you to each of the participant's tags every time you click on it. The number next to it, 29 in this case, tells you the number of tags.

Tagging Documents

Checking Tags (Participants)

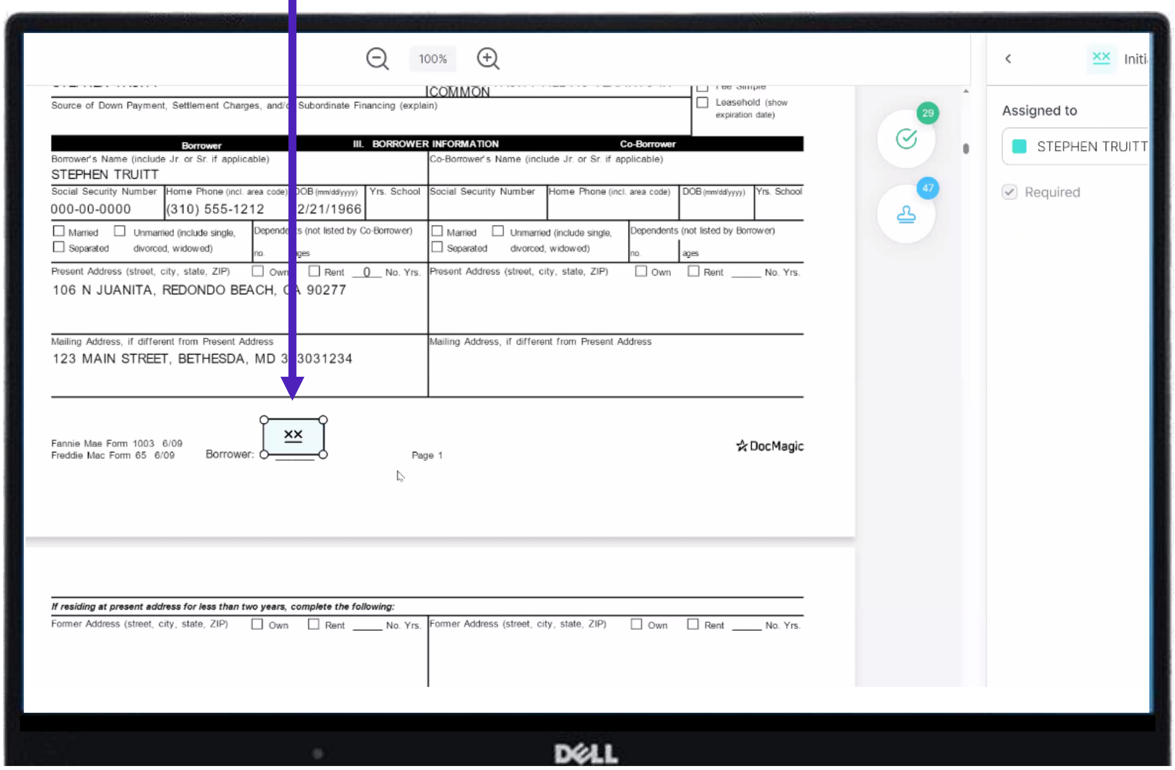
Let's say you come across a tag that needs to be corrected. We want to shift the position of this one.



Tagging Documents

Checking Tags (Participants)

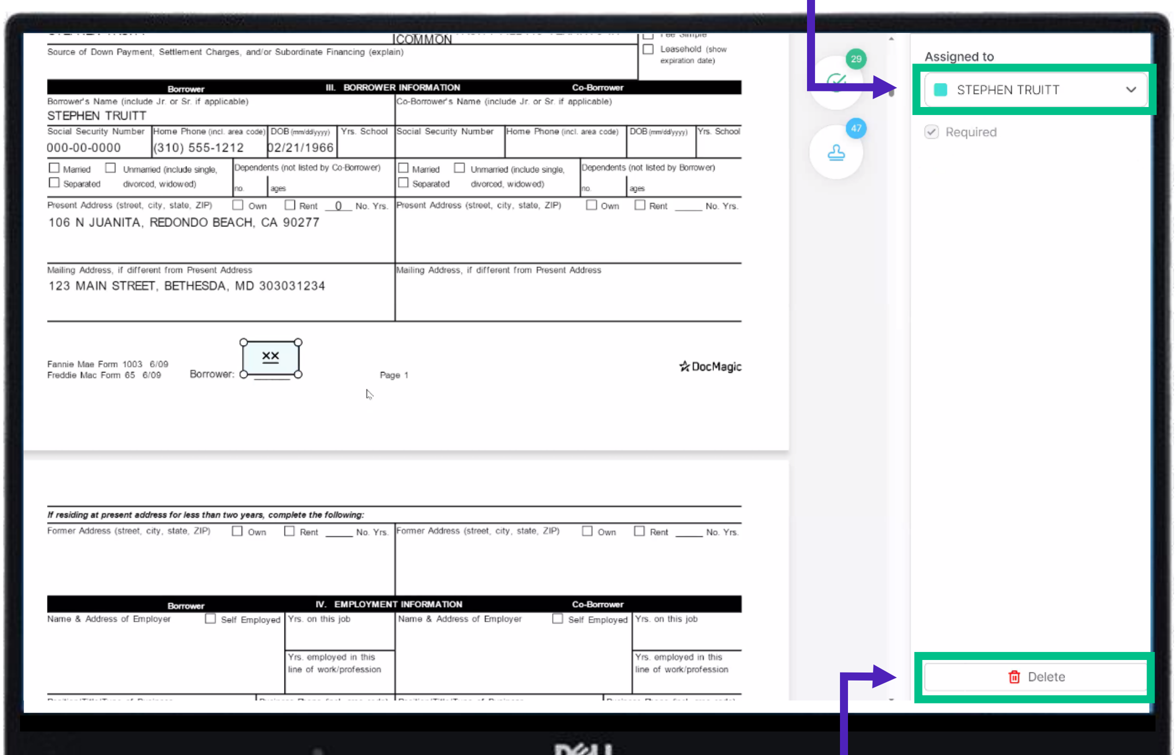
Click on a tag to select it. You'll know it's been selected when you see the four dots on the corners. Move it by dragging it with the mouse and letting go.



Tagging Documents

Checking Tags (Participants)

You can also see which participant the tag is assigned to here and change it from the drop down.

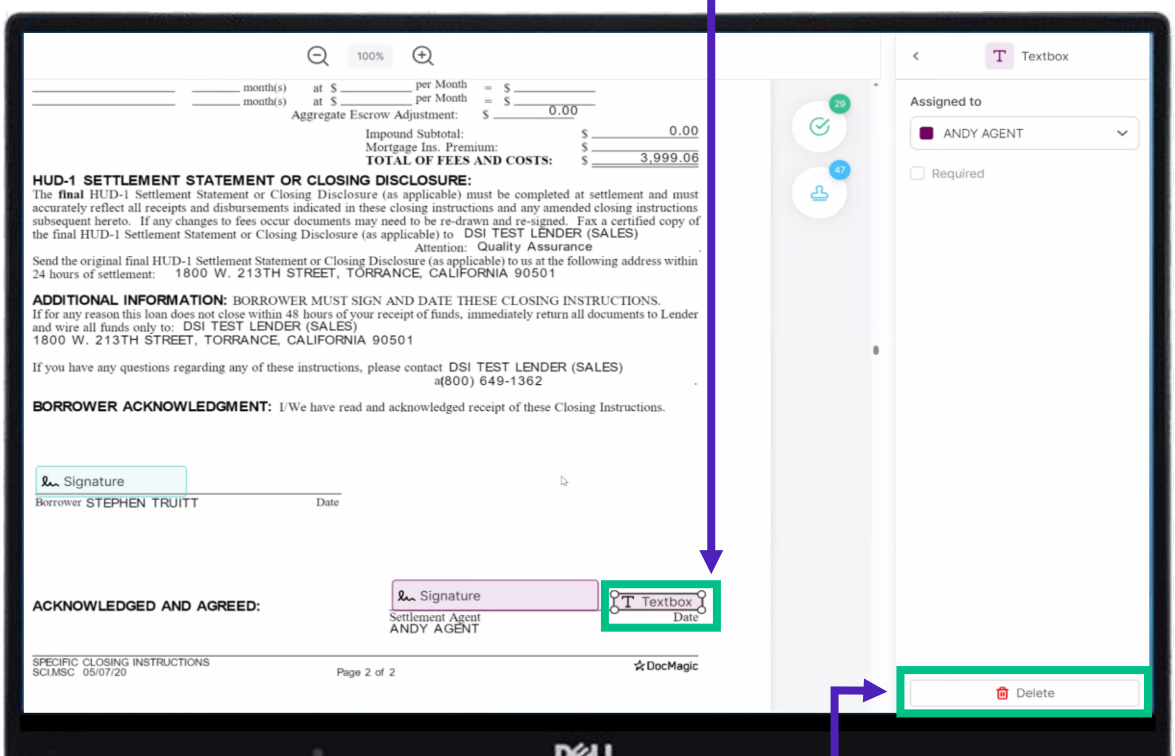


You also have the option to delete the tag, *but we only recommend doing so if the tag is completely unnecessary.* We'll show an example on the next page.

Tagging Documents

Deleting Tags (Participants)

If we scroll down a little further, we find this textbox next to a signature box above the word "Date". We can delete this textbox because the time and date is automatically applied next to every signature.

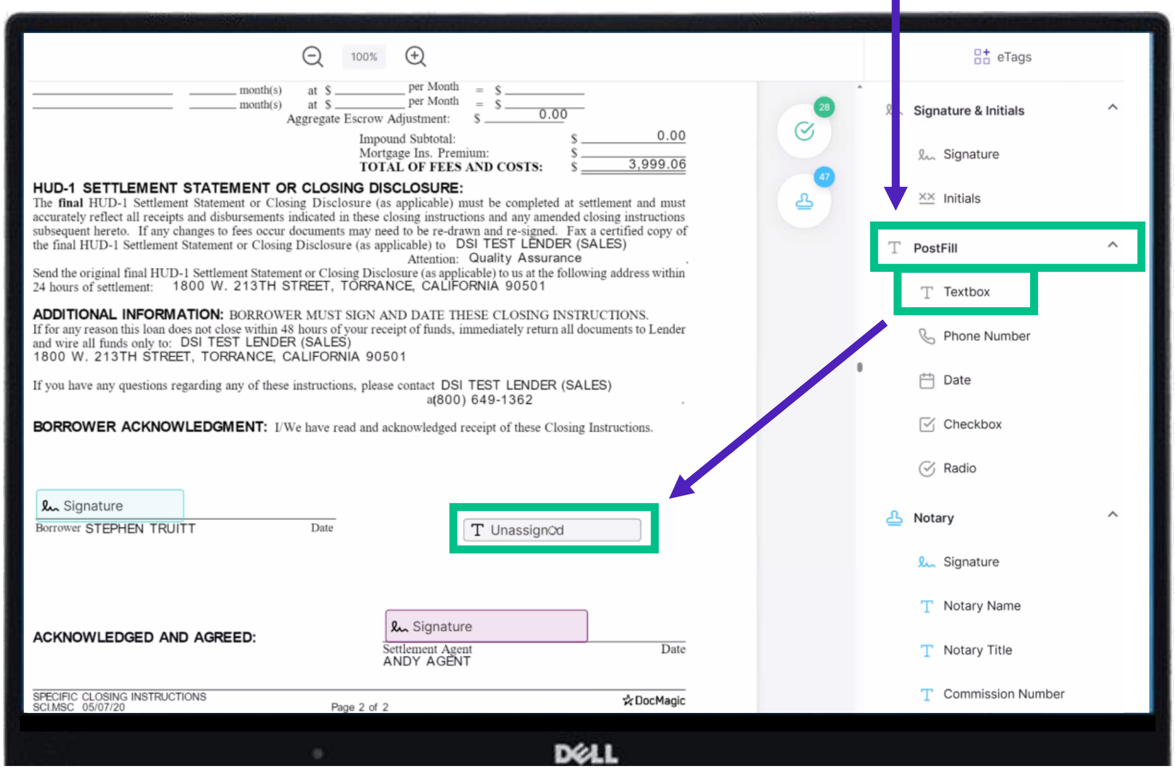


Click the Delete button here or press delete on your keyboard to remove the tag.

Tagging Documents

Adding Tags (Participants)

If you need to add something that must be filled out by a borrower, you can do that in PostFill. Click the little arrow to expand the list of options.

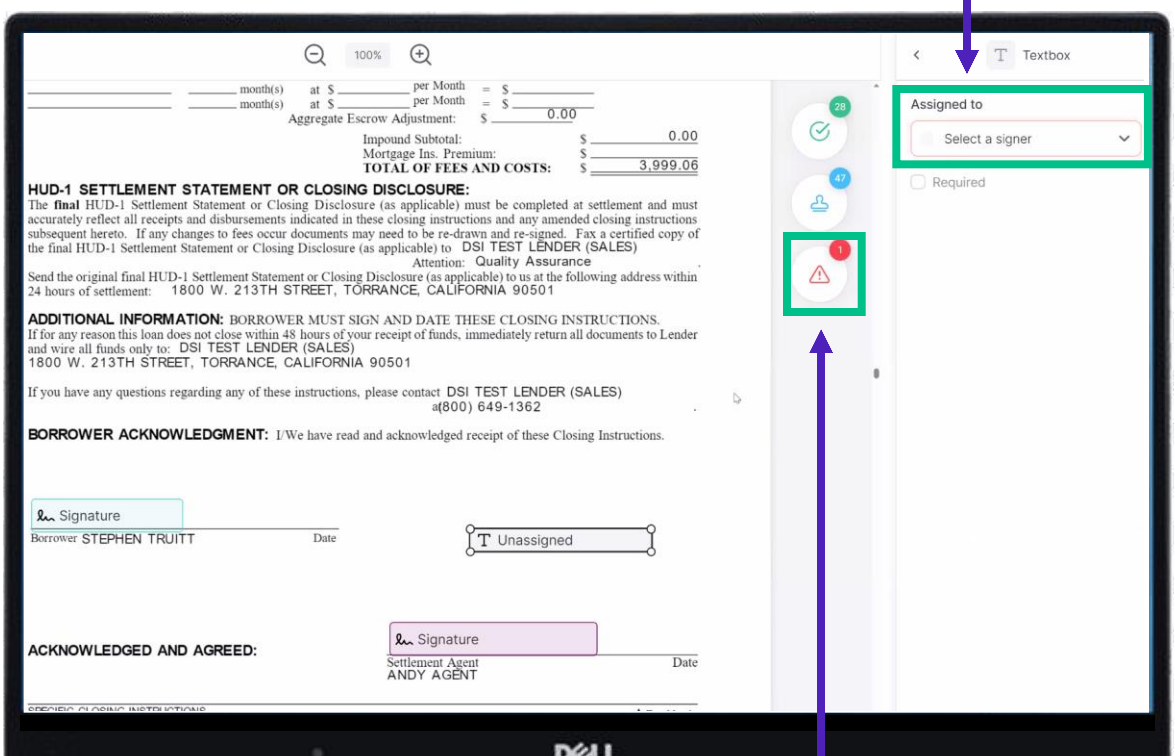


Click and drag the item you want (Textbox in this case) to your desired spot.

Tagging Documents

Adding Tags (Participants)

When you let go of the mouse, you'll be asked to Select a signer.

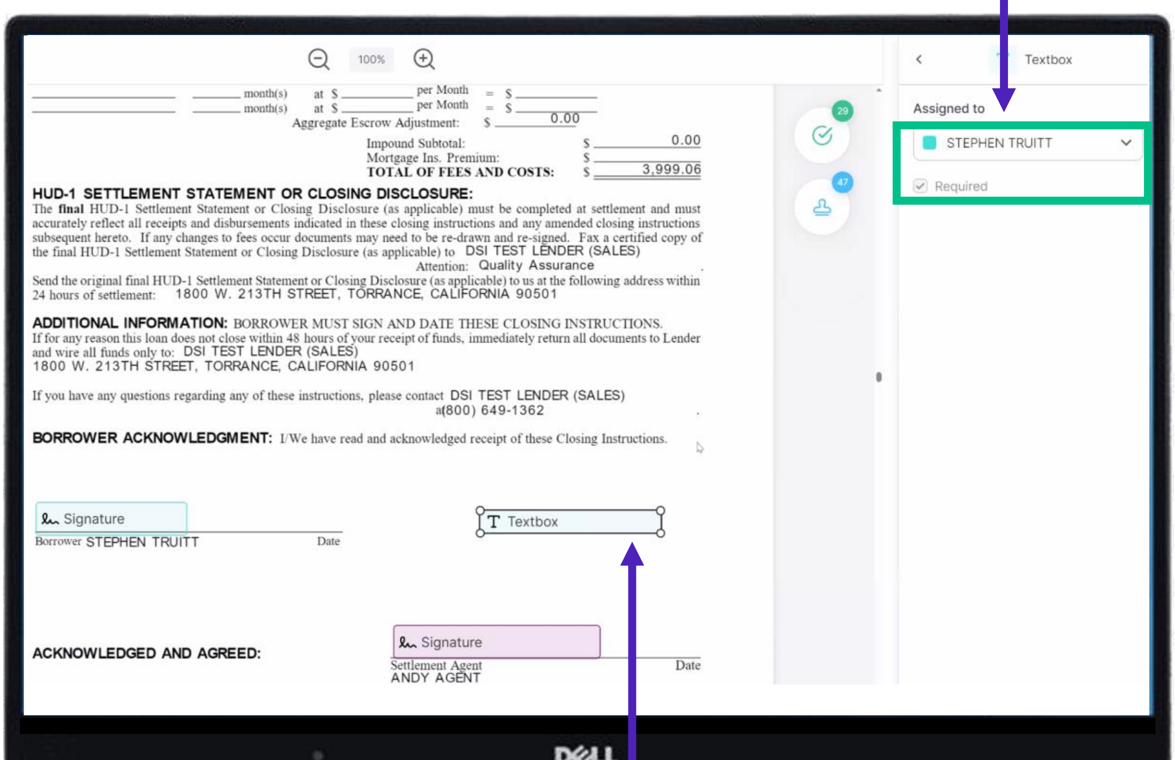


This warning triangle will appear – it is because you have an Unassigned text box.

Tagging Documents

Adding Tags (Participants)

Here's what that looks like after you select a Signer. Checking the Required box mean that the signer can't proceed unless they fill it out.



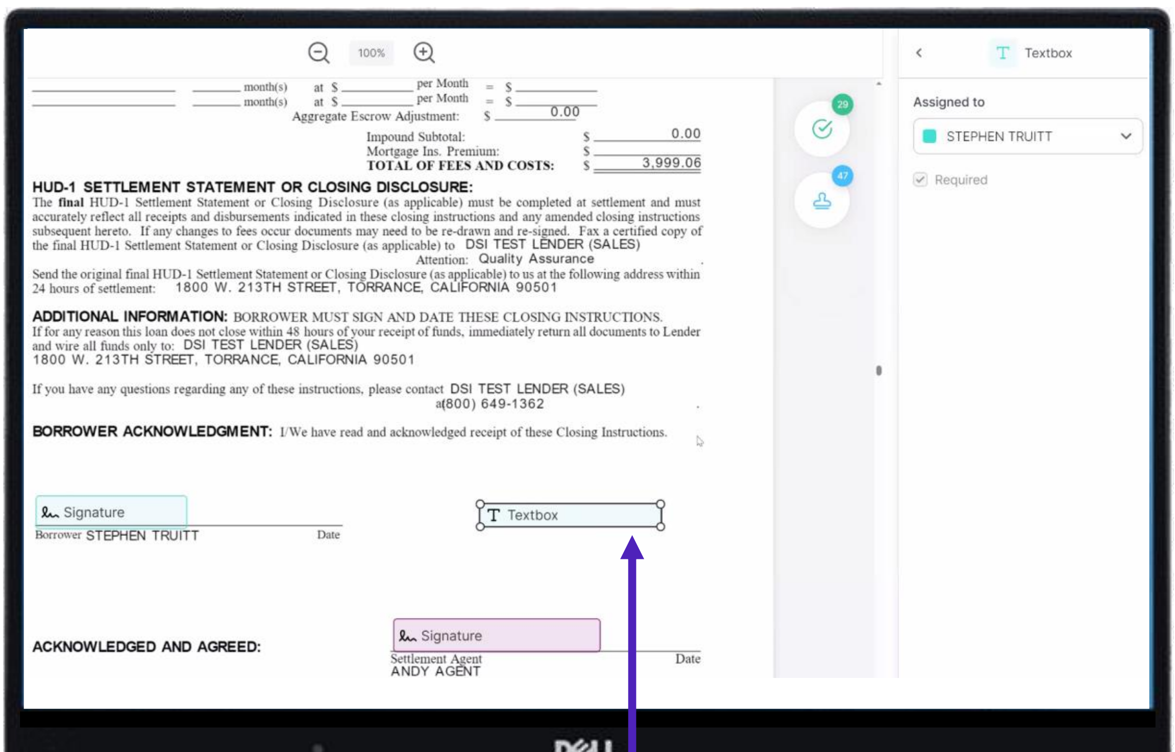
You'll notice that the warning triangle is gone, and that the Textbox no longer says Unassigned.

Please be careful not to assign borrower tags on notary documents and vice versa. This can cause confusion and delays during the signing experience.

Tagging Documents

Fill Before You Sign!

It's important to remember that during the signing experience, you can no longer edit a document after it's been signed.



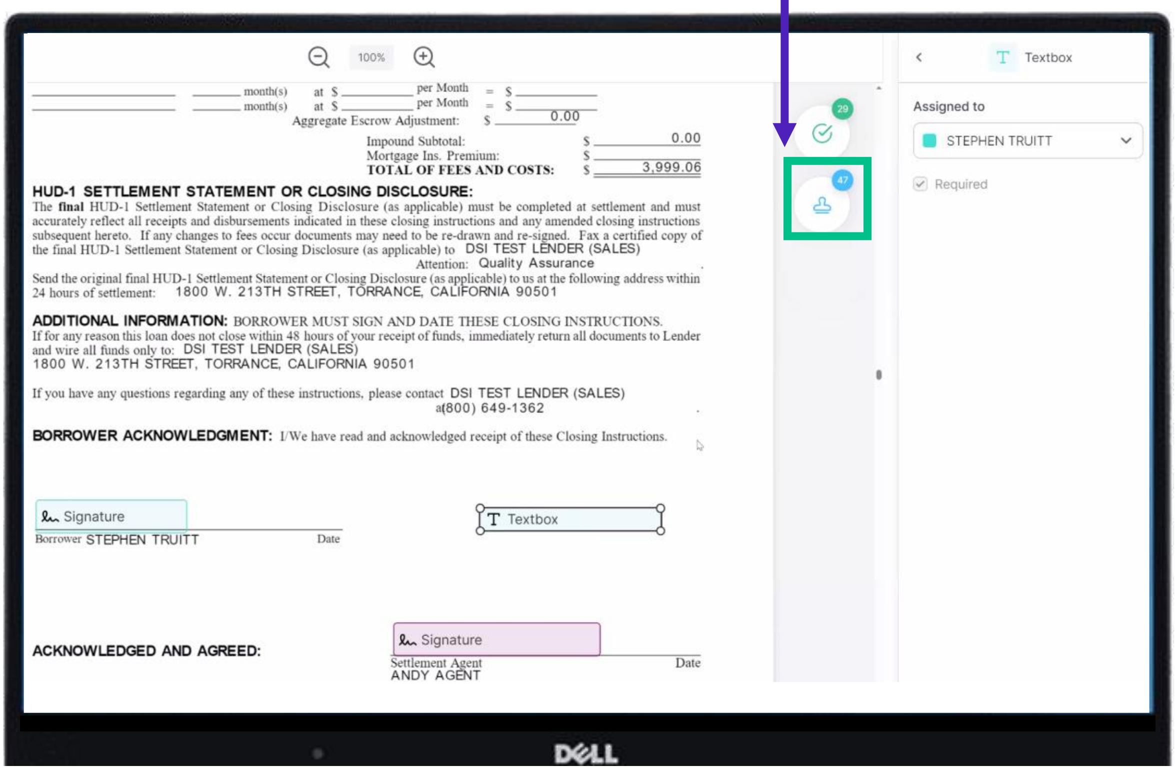
So if you added this textbox, make sure it's filled out before any signatures are applied.

Sometimes, Settlement Agents will go in and sign ahead of time. You can usually still edit tags when that happens.

Tagging Documents

Checking Tags (Notary)

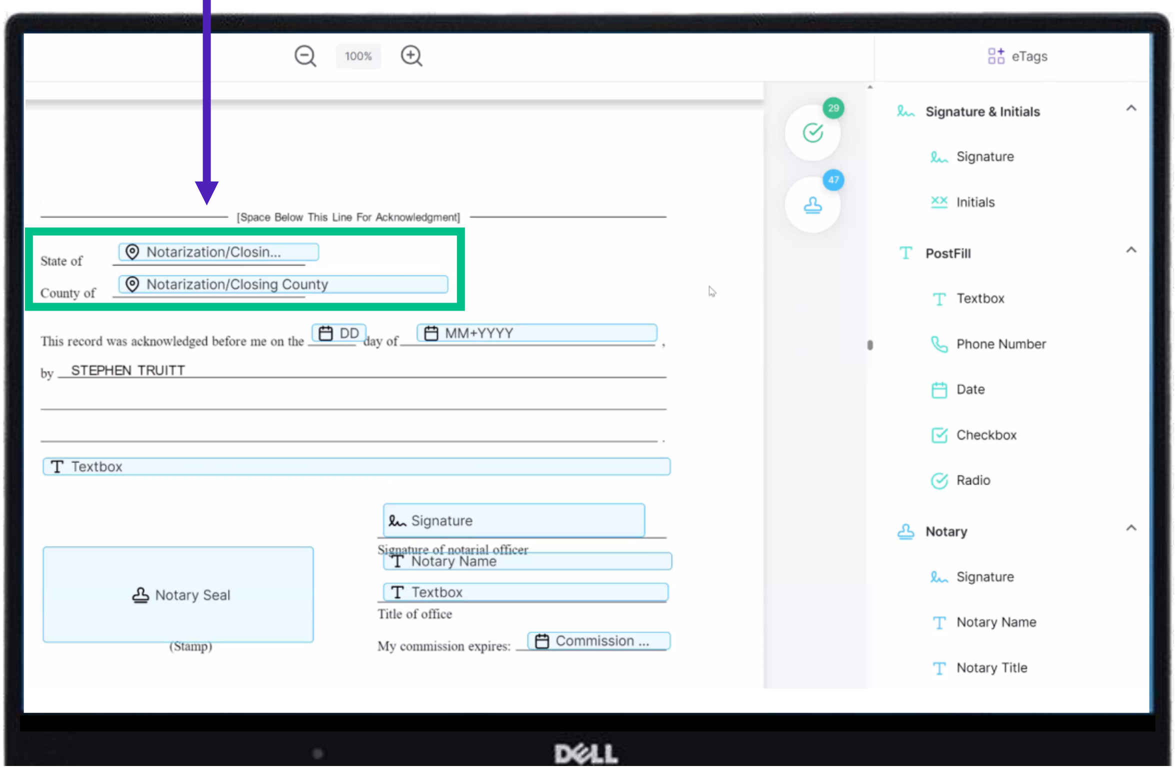
Now let's start checking the *Notary* tags. Click this button to toggle through those tags.



Tagging Documents

Checking Tags (Notary)

In some cases, tags will automatically be filled during the signing experience. When you're signing and you get to this page, the State will be most likely be populated but you may have to type in the County.

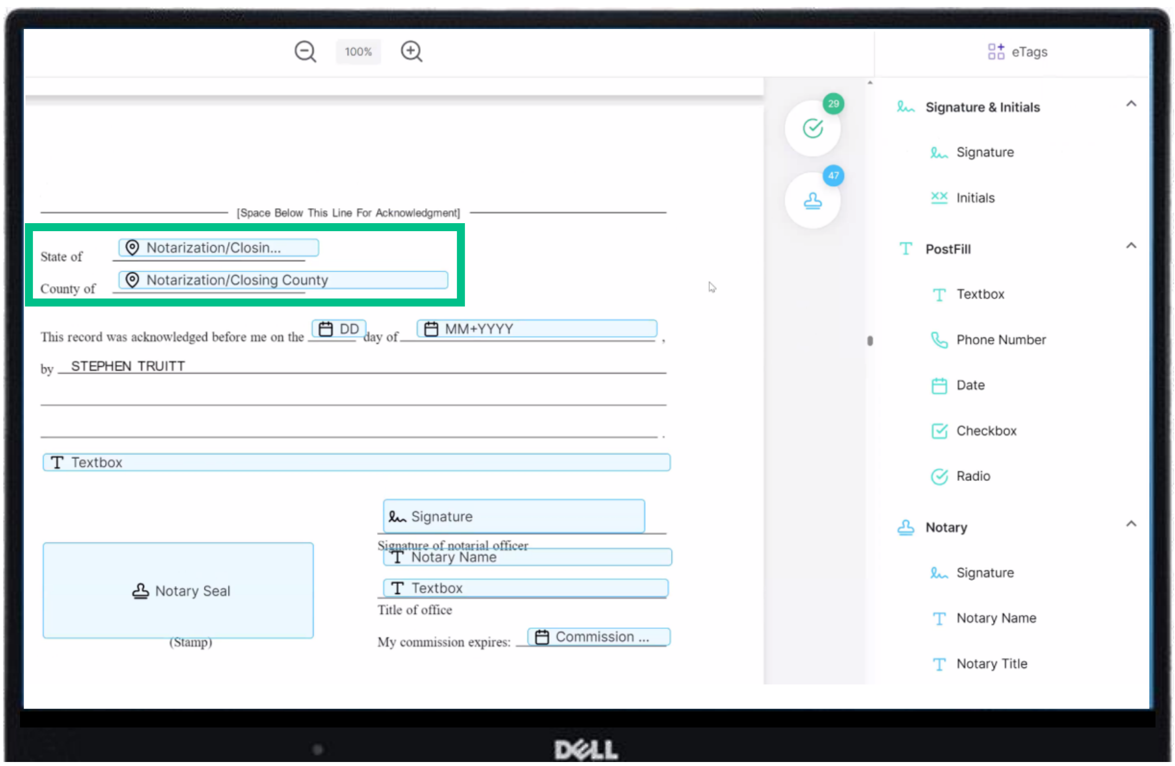


Sometimes, when you're jumping around checking tags, the top of the page might be cut off. Always scroll up a little bit to see if you're missing any tags.

Tagging Documents

Fill Out Before You Sign!

Fill out everything that you intend to complete on a document before you sign. Once you apply your signature and seal, you will no longer be able to edit a document.

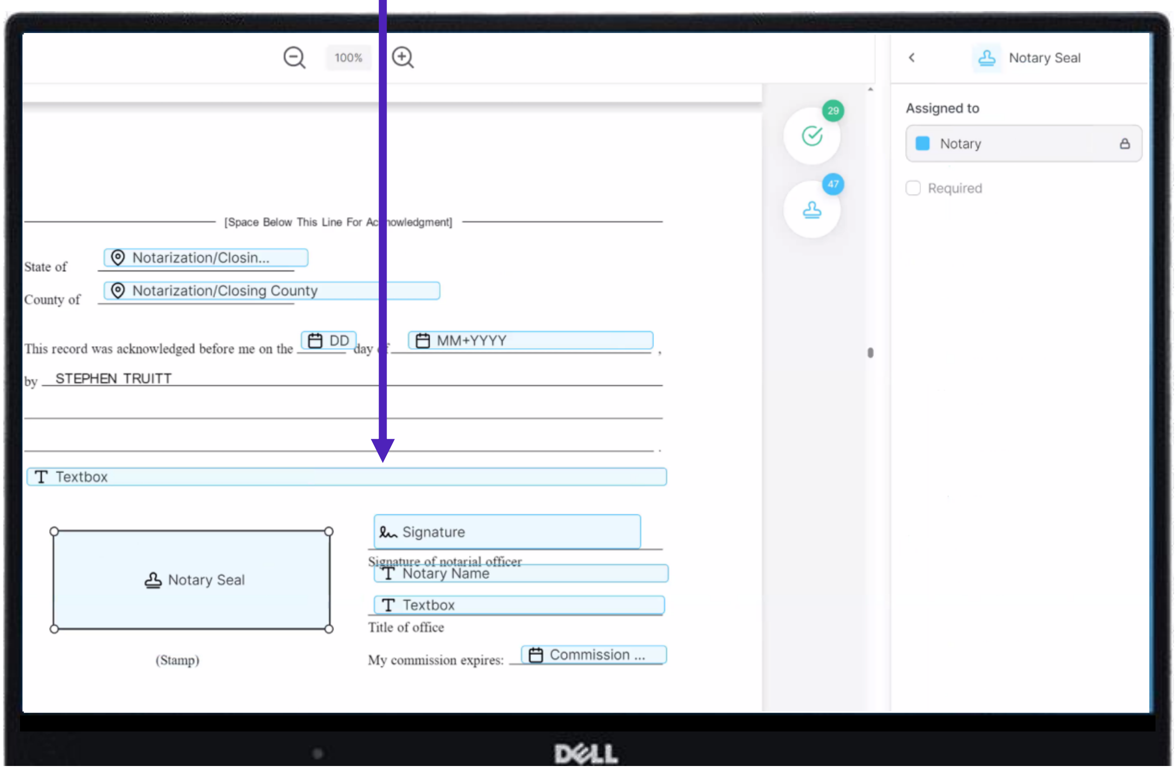


If the system skips your seal and signature and goes to the next page, you may have to complete more post-fill on the document before returning to sign. Remember that documents can be more than one page!

Tagging Documents

RON Regulatory Language

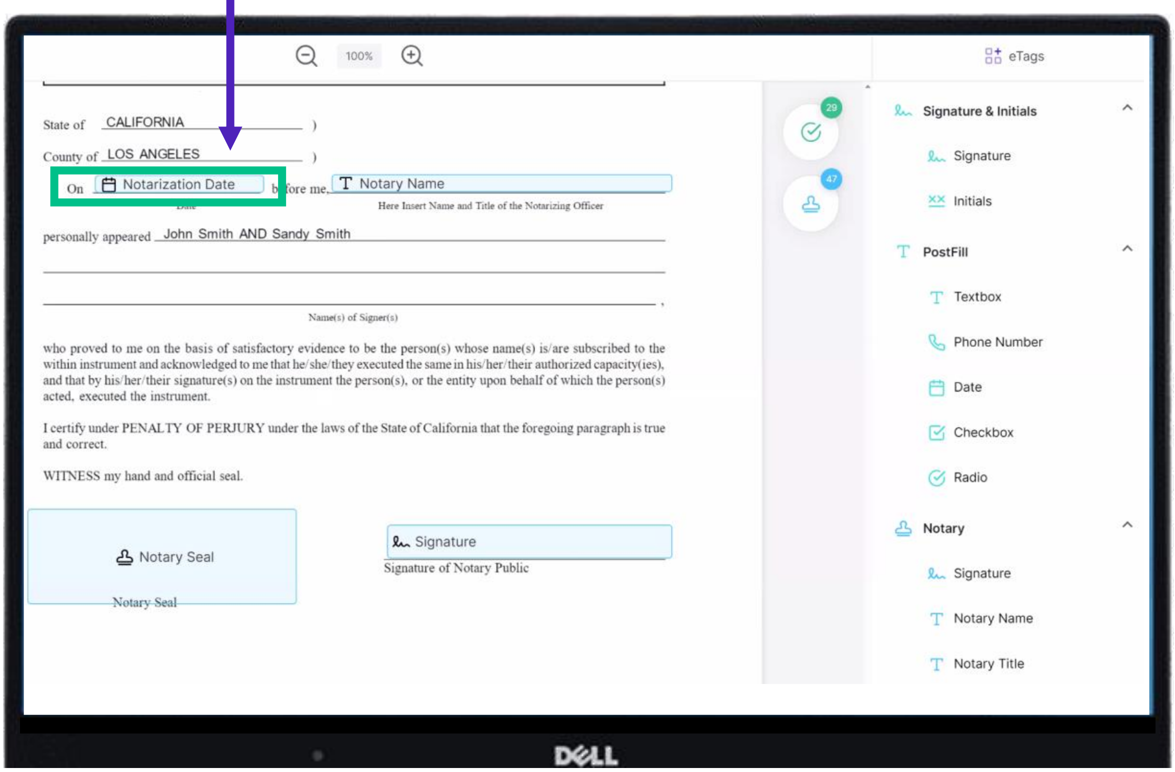
This textbox is for RON regulatory language. It will automatically populate with text saying that this notarization was created with audio and video technology.



Tagging Documents

Tags That We Recommend Not Deleting

We recommend that notaries do not remove any *date boxes* – note that this is different from the *text box* we removed earlier.

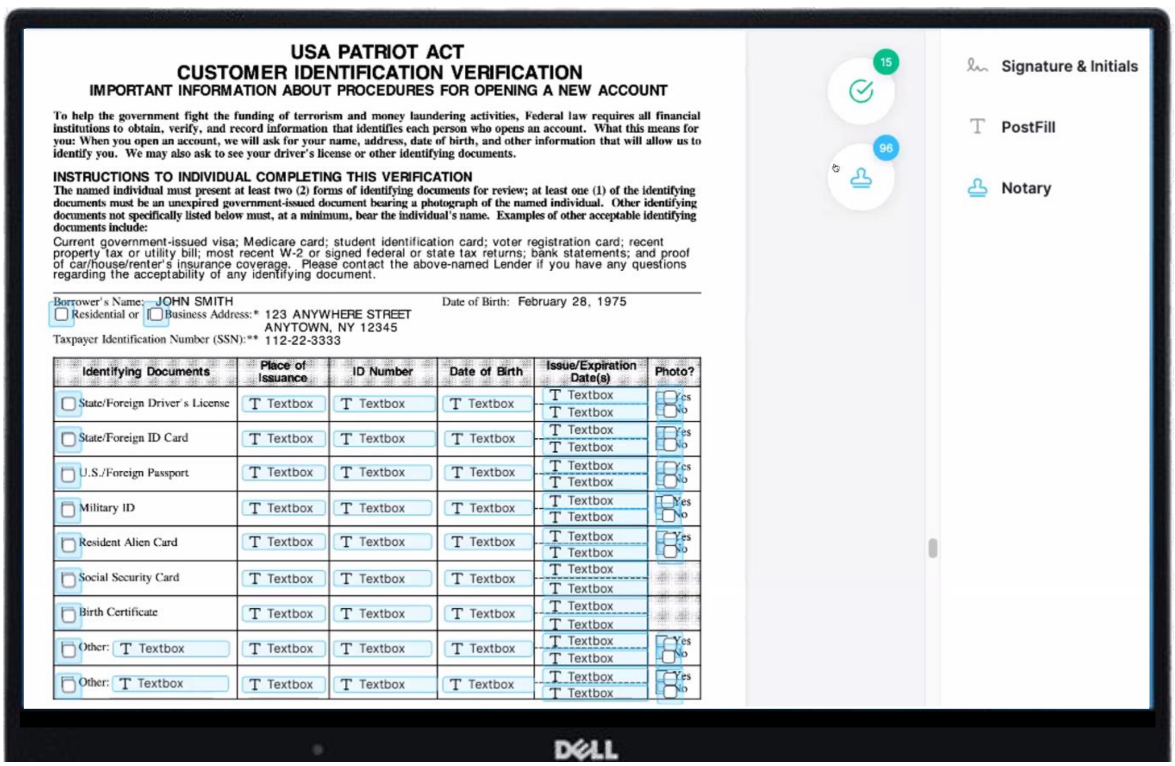


Please don't go crazy with deleting and replacing the tags. The system has already done the job that we told it to do, and the lenders want you to stick to their tagging practices. Just make sure there's no mistakes.

Tagging Documents

Patriot Act

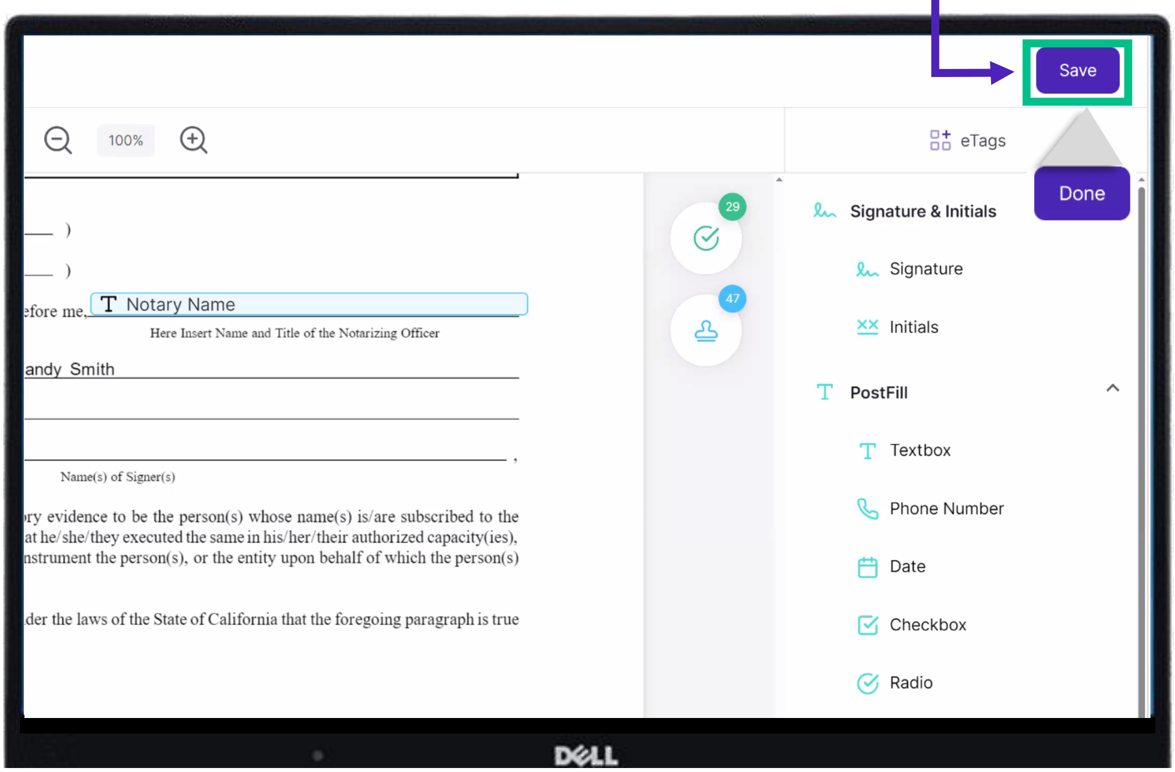
If your document package includes the Patriot Act, you may scroll to the next page if the tags look good instead of hitting the blue button 57 times.



Tagging Documents

Save & Done

When you're satisfied with the tags, click Save, then Done. You must wait for the text to change and then click Done!



You will be then be brought back to your Notary Portal.