



Settlement Agent eClose Console with AutoPrep

GUIDEBOOK

Table of Contents

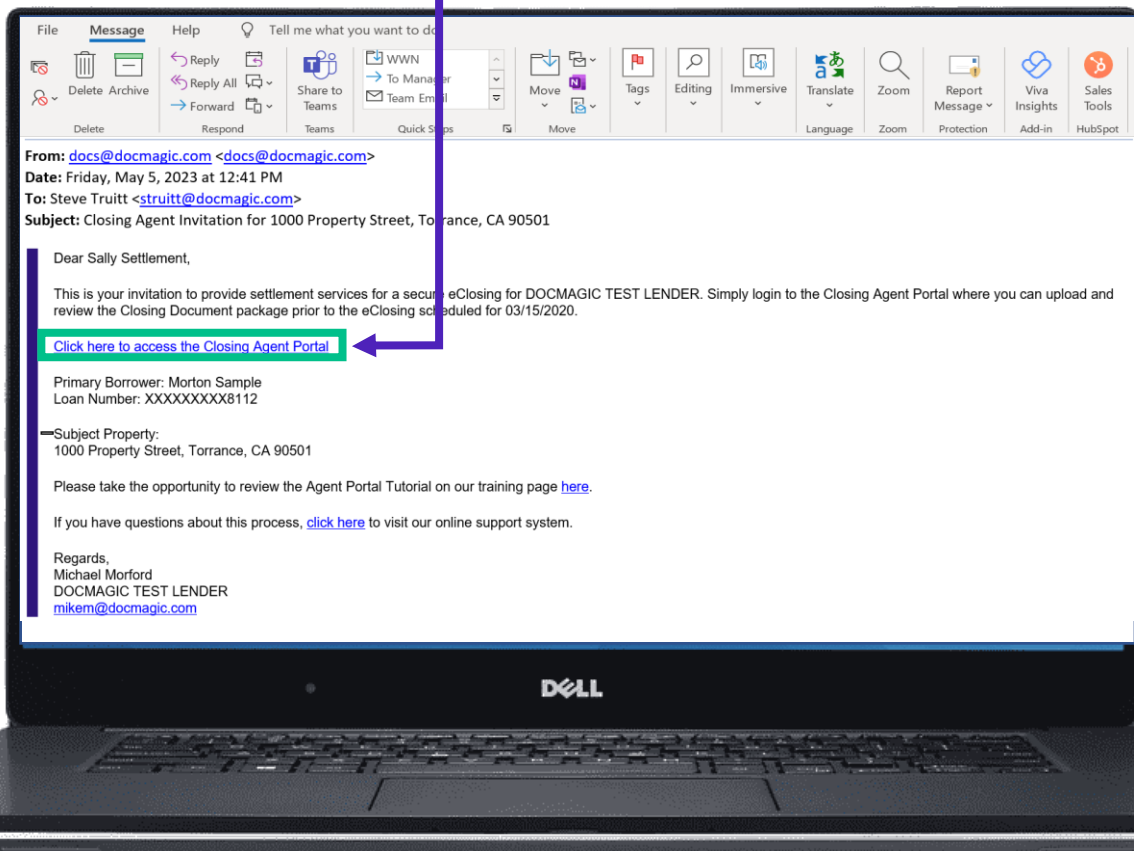
Email Invitation Access to SA Portal	Page 3
eClose Console Walk-Through	Page 5
Inviting Other Participants	Page 10
Document Upload (AutoPrep)	Page 18
Wet-Signed Documents	Page 35
Assigning a Notary	Page 38
Ready to Close	Page 44



Settlement Agent Invitation Email

The Settlement Agent will receive an invitation email when the lender creates the eClose event.

This link, along with the email is specific to this particular transaction.



Agent Login

The Settlement Agent will receive an invitation email and arrive at this verification page.

The screenshot shows a web browser window displaying the DocMagic eSign Agent Login verification page. The page has a green header bar with the eSign logo. Below the header, there is a 'Company Logo' placeholder and a 'Welcome Sally!' message. The message states: 'Congratulations on your decision to use DocMagic's Total eClose solution. The Closing Agent Portal provides you with the ability to review the Closing Documents, add Title Documents for execution, and facilitate the execution of the Closing event.' A green box highlights the verification area, which includes a text input field labeled 'Enter the Viewing Code', a box displaying the 'Viewing Code 7611', and a 'Continue to Next Step' button. A purple arrow points from the text box above to the 'Continue to Next Step' button. At the bottom of the page, there is a copyright notice: '© Copyright 2021 DocMagic, Inc. - ALL RIGHTS RESERVED'.

eSign

Company Logo

Welcome Sally!

Congratulations on your decision to use DocMagic's Total eClose solution.

The Closing Agent Portal provides you with the ability to review the Closing Documents, add Title Documents for execution, and facilitate the execution of the Closing event.

Enter the Viewing Code

Viewing Code
7611

Continue to Next Step

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eClose Console

This is the Settlement Agent's portal where you can check documents, assign signers, and verify the process as you go.

All pertinent loan information is at the top of your screen including borrower and lender info.

The screenshot displays the eClose Console (Settlement Agent) interface. At the top, the DocMagic logo and "eClose Console (Settlement Agent)" are visible, along with a user profile for Sally. The main content area is divided into several sections:

- LOAN**: Displays loan details including Loan # (777-1616630796081), Primary Borrower (Erica Sample), Type (EClosing), Package ID (333727), and Worksheet # (1616630796081 (Version: 1)).
- LENDER**: Displays lender information including Company (DSI TEST LENDER (SALES)), Contact (Michael Morford), Email (mikem@docmagic.com), and Phone ((800) 649-1362).
- COUNTDOWN TO CLOSING**: Shows a timer for Days, Hours, Minutes, and Seconds. The date is Apr 19, 2023 (Wed) and the time is 12:00am PDT.
- Signers (2)**: A table listing signers with columns for #, Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15)**: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are listed, including Uniform Residential Loan Application, MERS California Deed of Trust, Specific Closing Instructions, California Hazard Insurance Disclosure, Hazard Insurance Authorization and Requirements, and Borrower Consent to the Use of Tax Return Information.

The interface also includes navigation tabs for Details, eJournal, and Action Log, and a "Ready to Close" button.



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 (Settlement Agent) Sally ▾

LOAN Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[Details](#) [eJournal](#) [Action Log](#) [Ready to Close](#)

Signers (2) [Assign Notary](#)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉️ ⚪	📄 ⚪	● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15) [📄](#) [✎](#) [🖨](#) [📁](#) [🔍](#) Preview Mode ☒

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓



Help Button

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

DocMagic eClose Console (Settlement Agent)

LOAN
Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: -
HOURS: -
Date: Apr 19, 2023 (Wed)

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACEHOL...	3/25/2021 - 12:00am	📧 ⚪	📷 ⚪
2	Sally Settlement sally.settlement@example...	Settlement Agent	Unassigned			

Documents (15)

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓



Signer's Tab

The Signer's area highlights the information of all closing participants.

Doc Magic eClose Console (Settlement Agent) Sally ▾

LOAN Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[Details](#) [eJournal](#) [Action Log](#) [Ready to Close](#)

Signers (2) [Assign Notary](#)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15) Preview Mode ☒

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓



Signer's Details

Click on the signer's name to view, edit, or delete participant information. Make sure there is an email listed.

The screenshot displays the DocMagic eClose Console (Settlement Agent) interface. A modal window titled "Participant Details" is open, showing the information for a participant named Erica Sample. The modal includes fields for First Name, Last Name, Email, Phone Number, Access Code, and Role. The Role is set to "Borrower". There are "Cancel", "Delete", and "Save" buttons at the bottom of the modal. In the background, the "Signers (2)" list is visible, with "Erica Sample" highlighted. The "Documents (15)" list is also visible, showing various documents related to the loan.

Participant Details

View, edit, or delete the participant's information below.

First Name: Erica

Last Name: Sample

Email: erica.sample@example.com

Phone Number: () - -

Access Code: 0001

Role: Borrower

Cancel Delete Save

Signers (2)

#	Signer Name / Email
1	Erica Sample erica.sample@example.com
2	Sally Settlement sally.settlement@example.com

Documents (15)

#	eSign Enabled
1	Uniform Residential Loan Application
2	MERS California Deed of Trust
3	Specific Closing Instructions
4	California Hazard Insurance Disclosure
5	Hazard Insurance Authorization and Requirements
6	Borrower Consent to the Use of Tax Return Information



Adding Participants

Click on the Silhouette Icon to add a participant.

Fill out every line, then select a role for the participant.

DocMagic eClose Console (Settlement Agent)

LOAN Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081

LENDER Company: DSI TEST LENDER (SALES)

COUNTDOWN TO CLOSING
DAYS: -- HOURS: -- MINUTES: -- SECONDS: --
Date: Apr 19, 2023 (Wed) Time: 2:00am PDT

Signers (2)

#	Signer Name / Email	Role
1	Erica Sample erica.sample@example.c...	Borrower
2	Sally Settlement sally.settlement@example...	Settlement

Documents (15)

#	eSign Enabled	Signer(s)	Completed	
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

Add Participant

Add the participant's information below:

First Name:

Last Name:

Email:

Phone Number:

Access Code:

Role:

Click Add and they will be saved to the participants list.



Notary - Signer's Tab

Depending on the Notary provider, identity validation techniques like KBA & ID Verify will be enabled.

The screenshot shows the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, 'eClose Console (Settlement Agent)', and a user profile for 'Sally'. The main content area is divided into several sections:

- LOAN**: Displays loan details such as Loan #, Primary Borrower, Type, Package ID, and Worksheet #.
- LENDER**: Displays lender information including Company, Contact, Email, and Phone.
- COUNTDOWN TO CLOSING**: A timer showing days, hours, minutes, and seconds remaining until closing.
- Signers (2)**: A table listing the signers and their roles. The 'KBA / Status' and 'ID Verify / Status' columns are highlighted with a green box, and a purple arrow points to them from the text box above.
- Documents (15)**: A table listing the documents to be signed, including their page counts and completion status.

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	<button>Open Signing Room</button>
2	Sally Settlement sally.settlement@example...	Settlement Agent	Unassigned				● Ready to Sign	<button>Open Signing Room</button>

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

Note: This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose.



Notary - Signer's Tab

The Notary information is in "place-holder" mode until the notary accepts their invitation.

DocMagic eClose Console (Settlement Agent)

LOAN Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉️ ⓪	📄 ⓪	● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@example...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15)

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

Note: This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose.



Notary - Signer's Tab

The closing date and time is listed here. You can edit this right in the window, or in the Assign Notary pop-up.

The screenshot shows the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, 'eClose Console (Settlement Agent)', and a user profile for 'Sally'. The main content area is divided into several sections:

- LOAN**: Displays loan details such as Loan #, Primary Borrower, Type, Package ID, and Worksheet #.
- LENDER**: Displays lender information including Company, Contact, Email, and Phone.
- COUNTDOWN TO CLOSING**: A section with a timer showing days, hours, minutes, and seconds remaining until closing.
- Signers (2)**: A table listing the signers and their roles. The 'Notary Type / Closing Date - Time' column is highlighted with a blue box and a blue arrow pointing to it from the text box above.
- Documents (15)**: A table listing the documents to be signed, including their page counts and completion status.

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	<button>Open Signing Room</button>
2	Sally Settlement sally.settlement@example...	Settlement Agent	Unassigned				● Ready to Sign	<button>Open Signing Room</button>

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

Note: This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose.



Preview Tab

Preview Mode stays on until Midnight Hawaii time of the closing date. The Lender can disable your ability to toggle preview mode in their settings. As a Settlement Agent, you can sign documents without turning off Preview Mode.

DocMagic eClose Console (Settlement Agent)

LOAN
Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	Sign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉️ ⓪	📄 ⓪	● Not Started	Sign Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Sign Signing Room

Documents (15)

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower's Statement of Tax Return Information	1	1	✓

Preview Mode ☒ ON

ATTENTION: NEVER turn off *Preview Mode* ahead of the closing date. When the clock hits 0, Preview Mode will automatically turn off.



Documents Section

The Documents area includes all the documents to be executed. To view, you can click on the title of the document.

DocMagic eClose Console (Settlement Agent)

LOAN
Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15) [Print](#) [Edit](#) [Download](#) [Upload](#) [Refresh](#) [Close](#) Preview Mode **ON**

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓



Documents Section

eSign Enabled lists all the documents enabled for electronic signature in the package.

DocMagic eClose Console (Settlement Agent)

LOAN
Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
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COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15)

Preview Mode ☒

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓



Documents Section

At the bottom, "Print and Sign" lists all the documents in the package that require a wet signatures from the borrowers.

The screenshot shows the DocMagic eClose Console interface. The top navigation bar is purple with the DocMagic logo and the text "eClose Console (Settlement Agent)". The user's name "Sally" is displayed in the top right corner. The main content area displays a list of documents with columns for document number, name, page count, number of signers, and completion status. A green box highlights the "Print and Sign" section at the bottom, which lists documents requiring wet signatures. A blue arrow points from the text box above to this section.

#	Document Name	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓
7	California Fair Lending Notice	1	1	✓
8	California Private Mortgage Insurance Notice	2	1	✓
9	Closing Disclosure	5	1	✓
10	IVES Request for Transcript of Tax Return	2	1	✓
11	Initial Amortization Schedule	8	0	✓
12	Initial EscNew Account Disclosure Statement	2	1	✓
13	PMI Initial Disclosure - Fixed	2	1	✓
14	Signature Affidavit and AKA Statement	2	2	✓

#	Print and Sign	Page(s)	Signer(s)	Completed
1	Multistate Fixed Rate Note	3/3	1	✓

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Adding Documents

Click on this document button to add settlement documents to the package.

DocMagic eClose Console (Settlement Agent) Sally ▾

LOAN Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[Details](#) [eJournal](#) [Action Log](#) [Ready to Close](#)

Signers (2) [Assign Notary](#)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

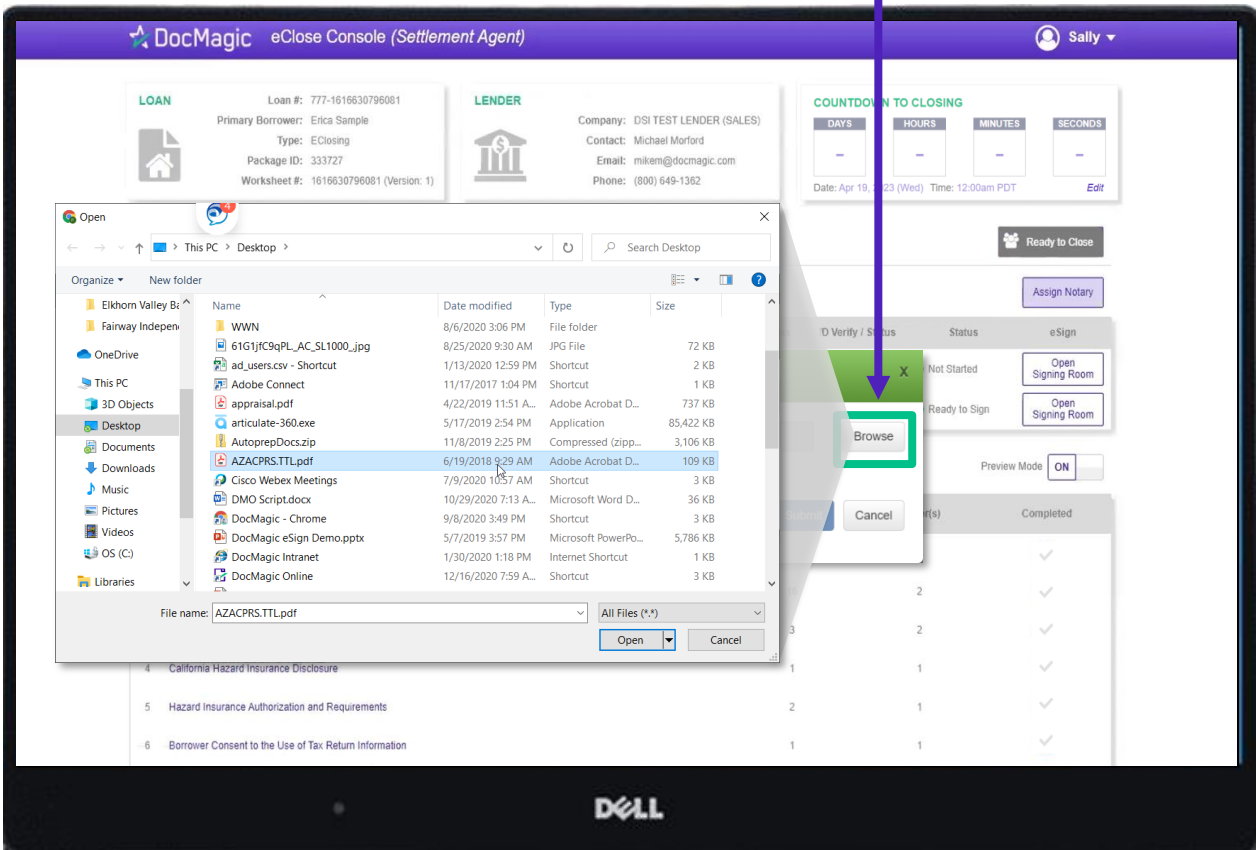
Documents (15) [Preview Mode](#) ☒

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓



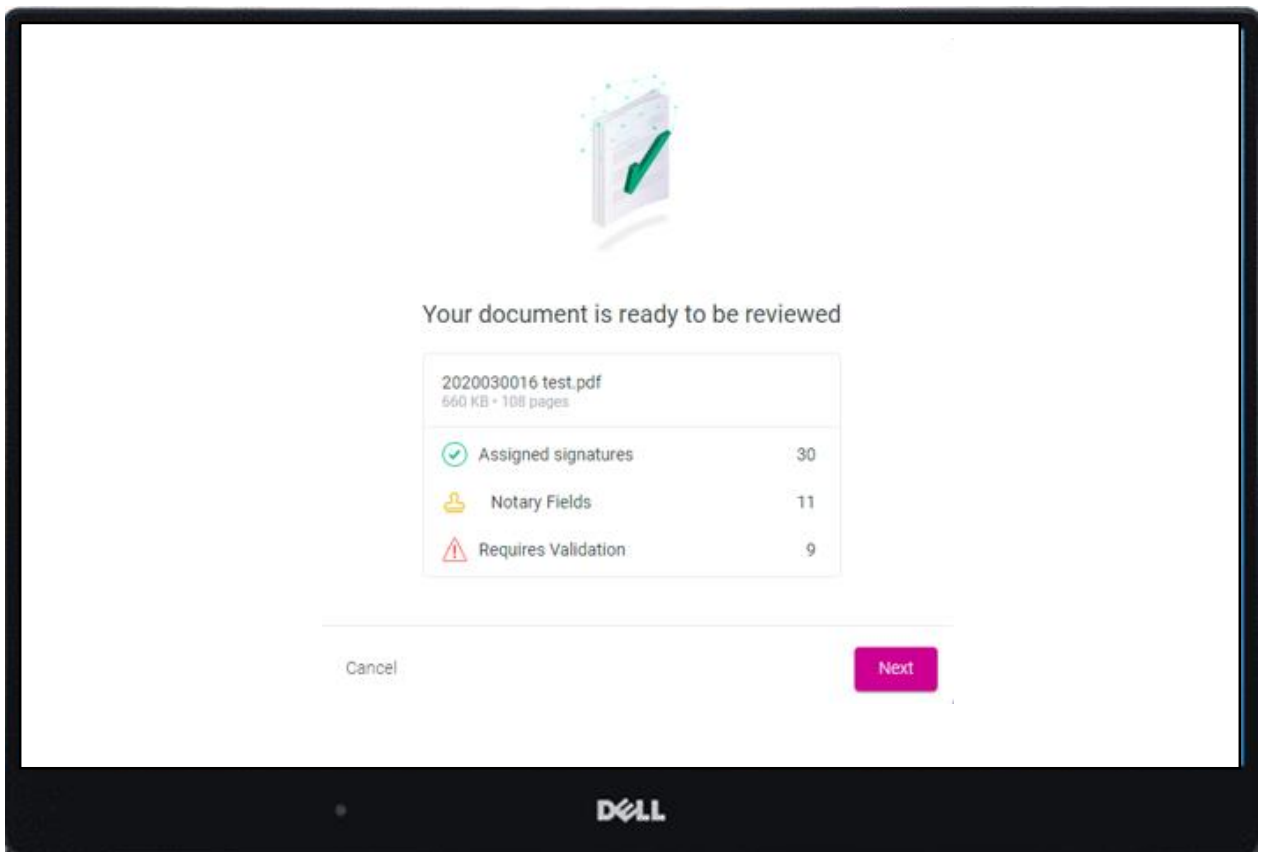
Adding Documents

Click the Browse button to navigate to the document you would like to add to the package.



AutoPrep

When the document is uploaded, it activates AutoPrep to check for and assign signatures, date boxes, and any Post-fill boxes needed.



AutoPrep uses A.I. and machine learning to prepare documents for signature.



Creating Signing Boxes via AutoPrep

Green means that the signature line has been identified to match a previously entered borrower/signer

APPRaisal DELIVERY WAIVER

Please also note that you have the right to waive receipt of your appraisal(s) at least three days prior to closing. You can choose to waive this right by checking the box below. If you choose to waive this right you will be provided your appraisal(s) at closing. If your loan does not close you will be provided your appraisal(s) shortly after your loan reaches a final decision status.

☐ By checking the box, you are requesting to waive your right to receive your appraisal(s) at least three days prior to closing. **

☐ By checking the box you are requesting to review your appraisal at least 3 days prior to closing. **Please note this could delay your closing.**

**Higher-Priced Mortgage Loans (HPML) as well as all loans right to receive appraisal(s) three days prior to closing.

ACKNOWLEDGMENT OF INFORMATION

I or We hereby certify that I or We, the Borrower(s):

- Have been provided with an initial Loan Estimate (LE)
- Received a copy of the Your Home Loan Toolkit
- Were not charged and did not pay any fee except for the fee for the appraisal(s) and the fee for the appraisal(s) expressing an intent to proceed.

The undersigned applicant(s) have illustrated an intent to proceed with this transaction.

Unassigned (Red callout bubble with signature icon)

Sammy Sample
Borrower 1

Sally Sample
Borrower 2 (Green callout bubble with checkmark icon)

To be determined
Notary

Belinda Helmick
Settlement Agent

Unspecified
Originator (Red callout bubble with warning icon)

Joseph Moore

Unassigned (Red callout bubble with signature icon)

Borrower SALLY SAMPLE Date

Red means that AutoPrep has found a signature line, but not a signer

Red fields *must* be verified before sending the document to proceed with eSign



AutoPrep

You have the option to correct the signature mark or choose 'Not needed for this transaction.' This will help the AI compute this accurately next time.

A screenshot of a notary certificate form. At the top, a box contains the text: "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." Below this, there are fields for "State of _____" and "County of _____". The main body of the form has a red location pin icon and the text "Subscribed and sworn to (or affirmed) before me on this _____ day of _____". Below this, the name "John Smith" is entered in a field, with a red dashed box around it. A dialog box is open over the signature field, asking "Why are you deleting this signature mark?". It has two radio button options: "Not a signature mark" (which is selected) and "Not needed for this transaction". At the bottom of the dialog are "Cancel" and "Delete" buttons. A mouse cursor is pointing at the "Delete" button. A purple arrow points from the text box above to the "Delete" button. At the bottom of the form, there is a blue location pin icon and the text "proved to me on the basis of satisfactory evidence to be the person(s) w". The Dell logo is visible at the bottom center of the screen.



The borrower will be highlighted in green

The screenshot displays a DocMagic document titled "2020030016 test.pdf". The document contains a loan agreement form. A green callout bubble with a pencil icon points to the "Borrower" field, which is highlighted in green and contains the text "Terry M Mackey (Borrower 1)". Below this field, the text "- BORROWER - Terry M Mackey - DATE -" is visible. A blue callout bubble with a pencil icon points to the "Notary" field, which is highlighted in blue and contains the text "Notary". Below this field, the text "Notary Public" and "My Commission Expires: _____" are visible. The form also includes fields for "State of _____" and "County of _____". The document is displayed on a Dell monitor.

Blue indicates a field that needs to be filled out via text/signature



AutoPrep

Blank fields can be populated with signature lines, initials, checkboxes, dates, and notary texts

The screenshot displays a DocMagic document titled "2020030016 test.pdf". The document is a loan agreement. It includes a green callout bubble with a signature icon pointing to a signature line. A dropdown menu is open, showing "Terry M Mackey (Borrower 1)" and a close button. Below this, there are fields for "BORROWER - Terry M Mackey - DATE -", "State of _____", and "County of _____". A blue callout bubble with a signature icon points to a line for "This instrument was acknowledged before me on _____ by Terry M Mackey.". Another dropdown menu is open, showing "Notary" and "Notary Public", with a close button. Below this is a field for "My Commission Expires: _____". A purple arrow points from a plus icon in a circle to a text box below the screenshot.

DocMagic

2020030016 test.pdf

The undersigned Borrower(s) do hereby so agree and covenant in order to assure that this loan documentation executed this date will conform and be acceptable in the marketplace in the instance of transfer, sale or conveyance by Lender of its interest in and to said loan documentation, and to assure marketable title in the said Borrower(s).

DATED this 24th day of April, 2020.

Terry M Mackey (Borrower 1)

- BORROWER - Terry M Mackey - DATE -

State of _____

County of _____

This instrument was acknowledged before me on _____ by Terry M Mackey.

Notary

Notary Public

My Commission Expires: _____

+

A user can fill out blank fields by clicking the plus



AutoPrep

The user is responsible for verifying the correct signer and fields

The screenshot displays a loan document interface with the following elements:

- Document Text:**

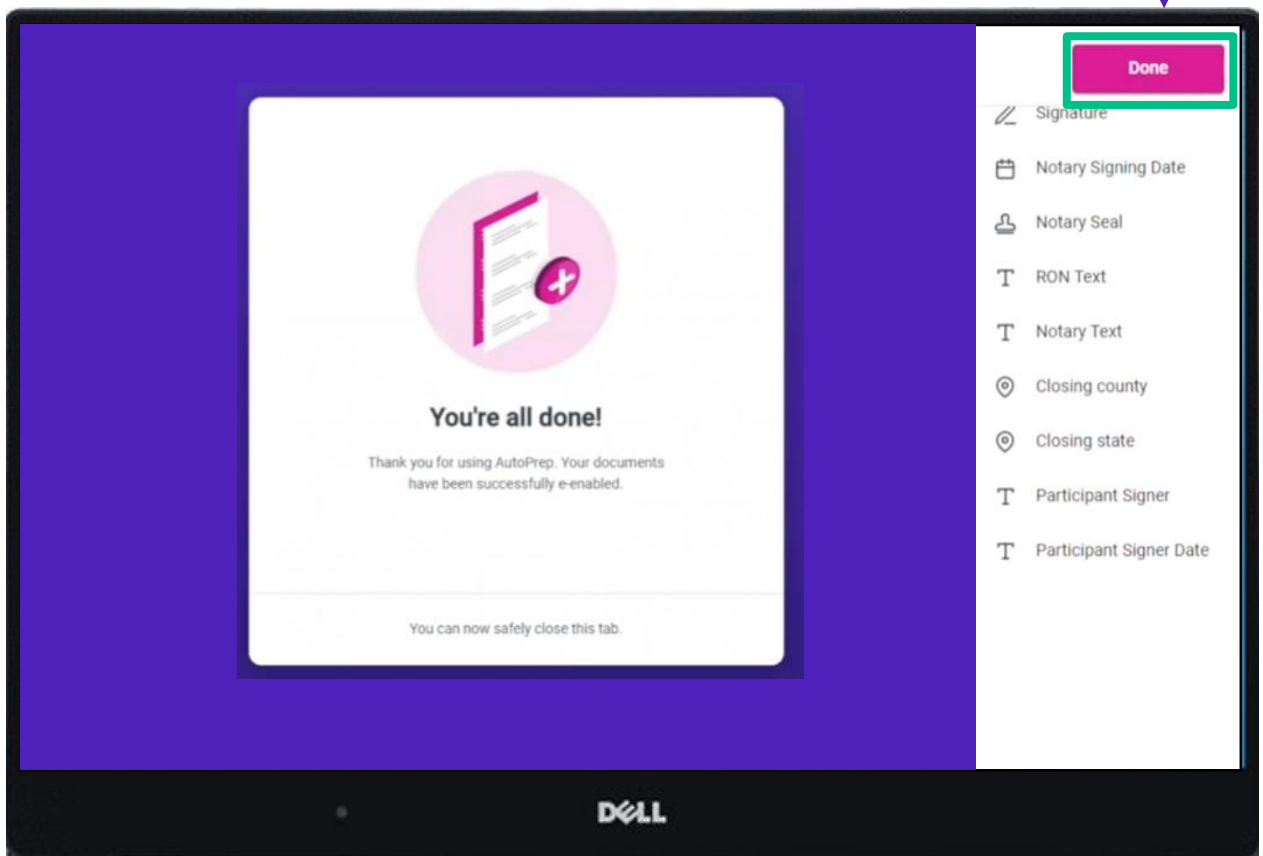
The undersigned Borrower(s) do hereby so agree and covenant in order to assure that this loan documentation executed this date will conform and be acceptable in the marketplace in the instance of transfer, sale or conveyance by Lender of its interest in and to said loan documentation, and to assure marketable title in the said Borrower(s).

DATED this 24th day of April, 2020.
- Fields:**
 - Borrower:** Terry Mackey (Borrower 1)
 - Notary:** Notary Public
 - My Commission Expires:** [Empty field]
 - State of:** [Empty field]
 - County of:** [Empty field]
- Signature Line:** This instrument was acknowledged before me on _____ by Terry M Mackey.
- Sidebar Menu:**
 - Signature
 - Notary Signing Date
 - Notary Seal
 - RON Text
 - Notary Text
 - Closing county
 - Closing state
 - Participant Signer
 - Participant Signer Date
- Buttons:** Done (pink button)



AutoPrep

When the documents are finalized, click done. You will see the confirmation message below.



Settlement Agent Portal – Post AutoPrep

After clicking Done, you will be returned to the Settlement Agent portal.

DocMagic eClose Console (Settlement Agent) Sally ▾

LOAN Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[Details](#) [eJournal](#) [Action Log](#) [Ready to Close](#)

Signers (2) [Assign Notary](#)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15) [Preview Mode](#) ☒

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

Hit refresh and your AutoPrep document will now be listed in the documents section.



Tagging Documents

To manually tag a document (add signatures or text fields, etc.) click on the pencil icon.

DocMagic eClose Console (Settlement Agent)

LOAN
Loan #: 71616630796081
Primary Borrower: Erica Sample
Type: E-closing
Package ID: 31727
Worksheet #: 116630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15)

Preview Mode ☒

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

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



Tagging Documents

You can add signatures, initials, post-fill boxes and notary information.

The screenshot displays the EClosing software interface. At the top, a dark blue header bar contains the text "EClosing" and "Prepare documents for signing". On the right side of this bar is a "Done" button. Below the header, a horizontal toolbar offers four tagging options: "Add Signature" (with a pen icon), "Add Initial" (with "AA" icon), "Add Postfill" (with a "T" icon), and "Add Notary Seal" (with a notary seal icon). A green box highlights these four options, with a purple arrow pointing from the text box above to the "Add Signature" button. The main area shows a "Closing Disclosure" form. On the left, a sidebar lists document thumbnails numbered 1 through 6, with document 5 selected. The form itself is titled "Closing Disclosure" and includes a disclaimer: "This form is a statement of final loan terms and closing costs. Compare this document with your Loan Estimate." The form is divided into several sections: "Closing Information" (Date Issued, Closing Date, Disbursement Date, Settlement Agent, File #, Property, Sale Price), "Transaction Information" (Borrower, Seller, Lender), "Loan Information" (Loan Term, Purpose, Product, Loan Type, Loan ID #, MIC #), "Loan Terms" (Loan Amount, Interest Rate, Monthly Principal & Interest), "Can this amount increase after closing?", "Does the loan have these features?" (Prepayment Penalty, Balloon Payment), and "Projected Payments" (Payment Calculation table).

Closing Information		Transaction Information		Loan Information	
Date Issued	6/4/2021	Borrower	John Smith 222333 Peachtree Place Atlanta, GA 30318	Loan Term	30 years
Closing Date	6/4/2021	Seller	Steve Seller 2127 Adams Dr NW Atlanta, GA 30318	Purpose	Purchase
Disbursement Date	6/4/2021	Lender	Sample Sons Lending	Product	Fixed Rate
Settlement Agent	Settlement Closing Company			Loan Type	<input checked="" type="checkbox"/> Conventional <input type="checkbox"/> FHA
File #				<input type="checkbox"/> VA <input type="checkbox"/>	
Property	2127 Adams Dr NW Atlanta, GA 30318			Loan ID #	1622818945601
Sale Price	\$180,000			MIC #	

Loan Terms		Can this amount increase after closing?	
Loan Amount	\$162,000	NO	
Interest Rate	3.875%	NO	
Monthly Principal & Interest <small>See Projected Payments below for your Estimated Total Monthly Payment</small>	\$761.78	NO	

Does the loan have these features?	
Prepayment Penalty	NO
Balloon Payment	NO

Projected Payments		
Payment Calculation	Years 1 - 7	Years 8 - 30
Principal & Interest	\$761.78	\$761.78



Tagging Documents

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

EClosing
Prepare documents for signing

Done

Closing Disclosure
This form is a statement of final loan terms and closing costs. Compare this document with your Loan Estimate.

Closing Information

Date Issued	6/4/2021
Closing Date	6/4/2021
Disbursement Date	6/4/2021
Settlement Agent	Settlement Closing Company
File #	
Property	2127 Adams Dr NW Atlanta, GA 30318
Sale Price	\$180,000

Transaction Information

Borrower	John Smith 222333 Peachtree Place Atlanta, GA 30318
Seller	Steve Seller 2127 Adams Dr NW Atlanta, GA 30318
Lender	Sample Sons Lending

Loan Information

Loan Term	30 years
Purpose	Purchase
Product	Fixed Rate
Loan Type	<input checked="" type="checkbox"/> Conventional <input type="checkbox"/> FHA <input type="checkbox"/> VA <input type="checkbox"/>
Loan ID #	1622818945601
MIC #	

Loan Terms

Loan Amount	\$162,000	Can this amount increase after closing?	NO
Interest Rate	3.875%		NO
Monthly Principal & Interest <small>See Projected Payments below for your Estimated Total Monthly Payment</small>	\$761.78		NO

Does the loan have these features?

Prepayment Penalty	NO
Balloon Payment	NO

Projected Payments

Payment Calculation	Years 1 - 7	Years 8 - 30
Principal & Interest	\$761.78	\$761.78

Closing Disclosure

1

2

3

4

5

6

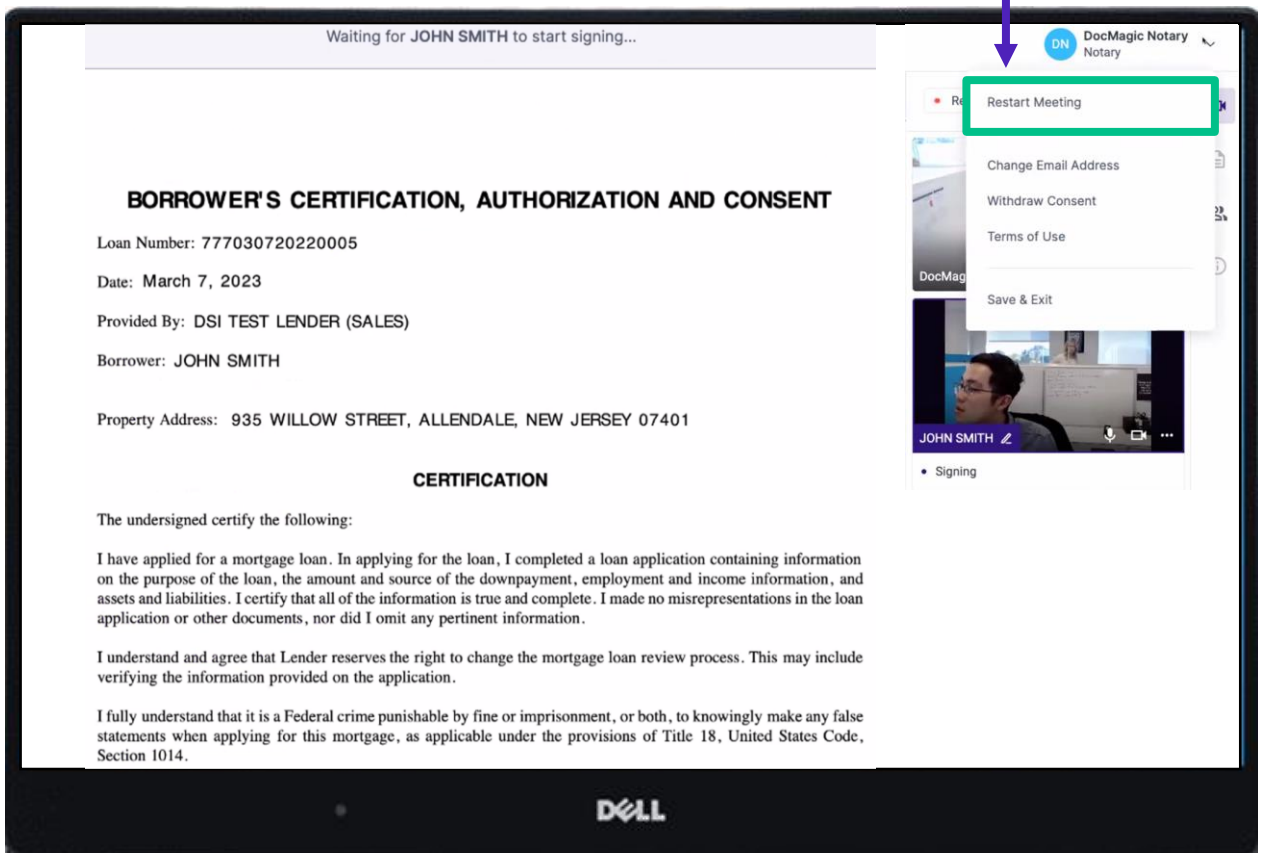
MULTISTATE
FIXED RATE
ELECTRONIC
NOTE

DELL



Restart Meeting

If you're tagging in the middle of a signing, 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.



The screenshot displays the DocMagic Notary interface. At the top, a status bar reads "Waiting for JOHN SMITH to start signing...". The main document area contains the following text:

BORROWER'S CERTIFICATION, AUTHORIZATION AND CONSENT

Loan Number: 777030720220005

Date: March 7, 2023

Provided By: DSI TEST LENDER (SALES)

Borrower: JOHN SMITH

Property Address: 935 WILLOW STREET, ALLENDALE, NEW JERSEY 07401

CERTIFICATION

The undersigned certify the following:

I have applied for a mortgage loan. In applying for the loan, I completed a loan application containing information on the purpose of the loan, the amount and source of the downpayment, employment and income information, and assets and liabilities. I certify that all of the information is true and complete. I made no misrepresentations in the loan application or other documents, nor did I omit any pertinent information.

I understand and agree that Lender reserves the right to change the mortgage loan review process. This may include verifying the information provided on the application.

I fully understand that it is a Federal crime punishable by fine or imprisonment, or both, to knowingly make any false statements when applying for this mortgage, as applicable under the provisions of Title 18, United States Code, Section 1014.

On the right side, a user profile for "JOHN SMITH" is visible. A dropdown menu is open, showing the following options: "Restart Meeting", "Change Email Address", "Withdraw Consent", "Terms of Use", and "Save & Exit". A green box highlights the "Restart Meeting" option, and a purple arrow points from the instructional text above to this option.

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



eJournal

The eJournal tab is only used for Hybrid 3 and Total eClose.

Click on this tab to access the eJournal.

DocMagic eClose Console (Settlement Agent)

LOAN Loan #: 163648191001
Primary Borrower: John Smith
Type: EClosing
Package ID: 417659
Worksheet #: 163648191001 (...)

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
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[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 look at the borrower's journal.
Note: the eJournal is **read-only** for the Settlement Agent.



Action Log

The Action Log is only used for Hybrid 3 and Total eClose.

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

DocMagic eClose Console (Settlement Agent) Sally

LOAN Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[Details](#) [eJournal](#) **[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

[Add Internal Note To Action Log](#)

You may also add notes at the bottom.



Print/Download Documents

Printer Icon allows you to download documents that require wet signatures.

DocMagic eClose Console Settlement Agent Sally ▾

LOAN Loan #: 777-16166307950
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[Details](#) [eJournal](#) [Action Log](#) [Ready to Close](#)

Signers (2) [Assign Notary](#)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exempl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15) [Preview Mode](#) ☒

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

PDF Icon allows you to download and print *all* the documents – not always necessary, just an option



Wet-sign Options

Upload signed and scanned documents here.

DocMagic eClose Console (Settlement Agent)

LOAN Loan #: 777-1615630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1615630796081 (Version: 1)

LENDER

Signers (2)

#	Signer Name / Email	Role	Notary Name	Email
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholder	NOTARY_EMAIL_PLACE...
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned	

Documents (15)

#	eSign Enabled
1	Uniform Residential Loan Application
2	MERS California Deed of Trust
3	Specific Closing Instructions
4	California Hazard Insurance Disclosure
5	Hazard Insurance Authorization and Requirements
6	Borrower Consent to the Use of Tax Return Information

IMPORTANT

YOU MUST USE THIS AS YOUR COVER SHEET.

DO NOT WRITE ON THIS FORM.
Messages or notes written on this form are discarded and will not be read.

INSTRUCTIONS

- 1. Print this document**
If you are viewing this on a mobile device, use "share" options to either print it from your device or email it to yourself then print it from a computer.
- 2. Carefully review and sign each document**
- 3. Return the document**
 - a) From the LoanMagic App
 - Go
 - Navigate to the document that requires an ink signature
 - Press the "Scan" button and follow the onscreen instructions.
 - or -
 - b) From the eSign website
 - Scan signed documents to PDF file.
 - Use Upload link within eSign session and follow on-screen prompts.
 - or -
 - c) Using a fax machine
 - FAX to 1-866-420-1583

Loan 777435612
Pages 25
From STEVE SAMPLE

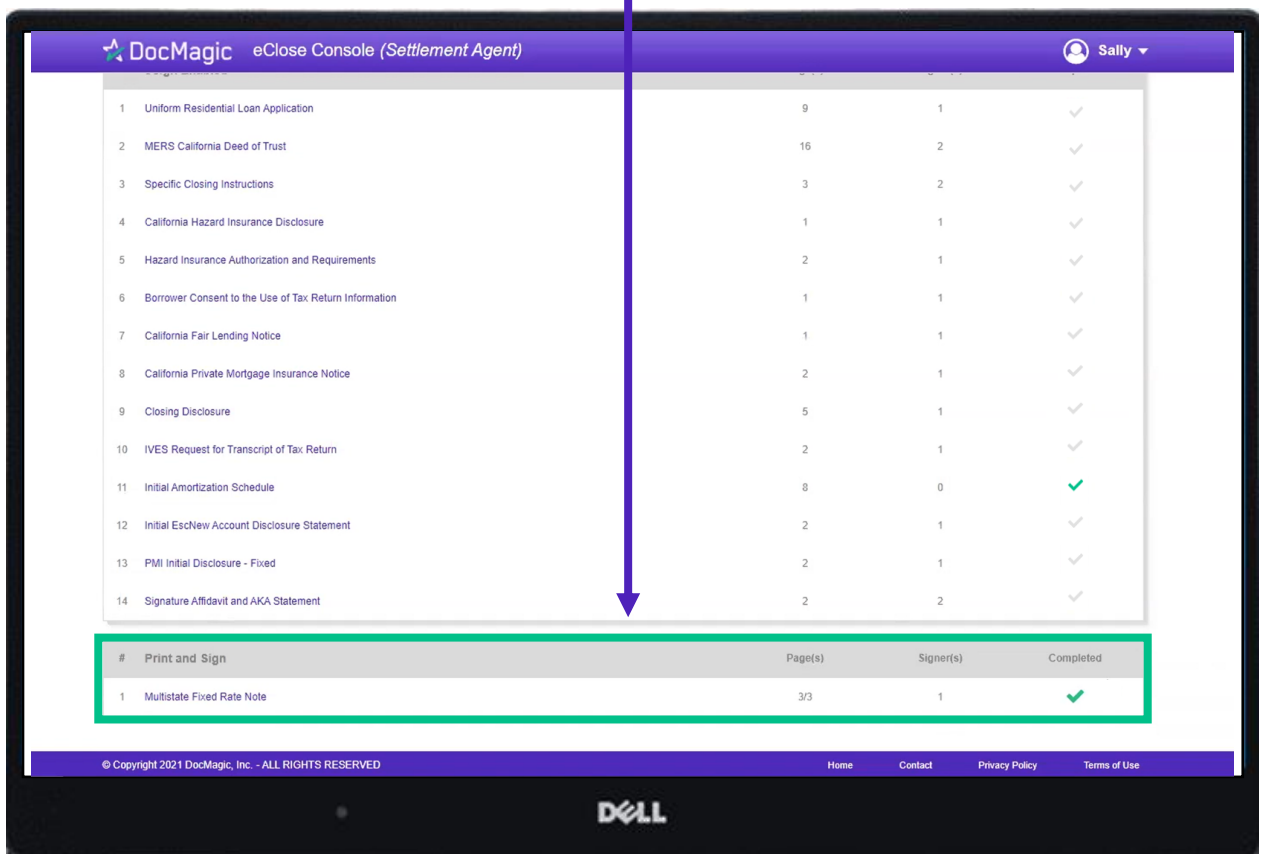
75605744-1

The QR Code on each page will place the signed documents in the right order in the stack.



Wet-sign Options

Completed wet signed documents will show up at the bottom with a green checkmark.



The screenshot displays the DocMagic eClose Console interface for a Settlement Agent named Sally. It shows a list of 14 documents with their respective page counts and completion status. The bottom row, 'Multistate Fixed Rate Note', is highlighted with a green border and a green checkmark in the 'Completed' column, indicating it is a completed wet signed document.

#	Print and Sign	Page(s)	Signer(s)	Completed
1	Multistate Fixed Rate Note	3/3	1	✓



Don't Confuse These Two!

As a reminder, this button allows you to upload *new* documents to the package.

The screenshot shows the DocMagic eClose Console interface for a Settlement Agent named Sally. The top navigation bar includes the DocMagic logo, the user's name 'Sally', and a 'Ready to Close' button. The main content area is divided into several sections: 'LOAN' details, 'LENDER' information, a 'COUNTDOWN TO CLOSING' timer, and a 'Signers (2)' table. Below the signers table is the 'Documents (15)' section, which contains a table of documents and a toolbar with icons for document management. A green box highlights the 'New Document' icon (a document with a plus sign) in the toolbar. A purple arrow points from the text box above to this icon.

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			Not Started	<button>Open Signing Room</button>
2	Sally Settlement sally.settlement@examp...	Settlement Agent	Unassigned				Ready to Sign	<button>Open Signing Room</button>

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

This one lets you upload *ink-signed* documents.

NOTE: It is *extremely important* that you do not mix up these two buttons and upload documents to the wrong place.



Assign a Notary

Click this button to start the process of assigning a notary. A separate window will appear.

DocMagic eClose Console (Settlement Agent)

Assign / Notify Notary

***Notary Provider**
Select

***Notary Type**
☐ In Person
☐ Remote Online Notary (RON)

Signers

Name	Email	Role	Phone
JOHN SMITH	aland@docmagic.com	Borrower	Home: (502) 767-8509 Mobile: (562) 652-2578

Request Summary

1 participants for a In Person eClosing for a property in Sample, NJ.

***Estimate Closing Date** 2/14/2023 ***Time** 12:00 AM **America/Los Angeles**

Cancel Assign Notary

Note: This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose.



Assign a Notary

If your Notary Provider is World Wide Notary, select WWN here.

DocMagic eClose Console (Settlement Agent) Sally

Assign / Notify Notary

***Notary Provider**: WWN

***Notary Type**: ☒ In Person ☐ Remote Online Notary (RON)

Signers

Name	Email	Role	Phone
JOHN SMITH	aland@docmagic.com	Borrower	Home: (502) 767-8509 Mobile: (562) 652-2578

Request Summary

1 participants for a In Person eClosing for a property in Sample, NJ.

*Estimate Closing Date: 2/14/2023 *Time: AM America/Los Angeles

Cancel Assign Notary

For WWN, you must select "In Person" for Notary Type.



Assign a Notary

Set the closing date and time.

DocMagic eClose Console (Settlement Agent) Sally

Assign / Notify Notary

***Notary Provider**
WWN

***Notary Type**
☒ In Person
☐ Remote Online Notary (RON)

Signers

Name	Email	Role	Phone
JOHN SMITH	aland@docmagic.com	Borrower	Home: (502) 767-8509 Mobile: (562) 652-2578

Request Summary

1 participants for a In Person eClosing for a property in Sample, NJ.

*Estimate Closing Date: 2/14/2023 *Time: 12:00 AM America/Los Angeles

Cancel Assign Notary

Click "Assign Notary" when done.



Assign a Notary

If your Notary Provider is NotaryCam or DocMagic RON, choose Remote Online Notary for Notary Type.

DocMagic eClose Console (Settlement Agent) Sally ▾

Assign / Notify Notary ✕

***Notary Provider**
NotaryCam ▾

***Notary Type**
☐ In Person
☒ Remote Online Notary

Signers

#	Signer Name / Email	Name	Email	Role	Phone
1	Erica Sample erica.sample@exam...	Erica Sample	erica.sample@exam...	Borrower	Home: (800) 649-1362
2	Sally Settlement sally.settlement@ex...				

Request Summary

1 participants for a RON eClosing for a property in Torrance, CA.

*Estimate Closing Date: 3/25/2021 *Time: 12:00 AM America/Los Angeles

Cancel Assign Notary

Documents (16)

#	eSign Enabled
1	Uniform Residential
2	MERS California De
3	Specific Closing Inst
4	California Hazard In
5	Hazard Insurance Authorization and Requirements
6	Borrower Consent to the Use of Tax Return Information

DOWN TO CLOSING

HOURS MINUTES SECONDS
2023 (Wed) Time: 12:00am PDT Edit

Ready to Close

Assign Notary

Status eSign

Not Started Open Signing Room

Ready to Sign Open Signing Room

Preview Mode ON

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



Assign a Notary

If you select *NotaryCam* as your Notary Provider, you will only need to set the closing date and time. *NotaryCam* services are not available on mobile devices.

DocMagic eClose Console (Settlement Agent) Sally ▾

Assign / Notify Notary

***Notary Provider** NotaryCam ▾

***Notary Type** **Required*

☐ In Person

☒ Remote Online Notary

Signers

#	Signer Name / Email	Name	Email	Role	Phone
1	Erica Sample erica.sample@example.com	Erica Sample	erica.sample@example.com	Borrower	Home: (800) 649-1362
2	Sally Settlement sally.settlement@example.com				

Request Summary

1 participants for a RON eClosing for a property in Torrance, CA.

***Estimate Closing Date** 3/25/2021 ***Time** 12:00 AM America/Los Angeles

Cancel Assign Notary

Click "Assign Notary" when done.



Assign a Notary

If you select *DocMagic RON* as your Notary Provider, a different window (shown below) will appear.

Assign / Notify Notary

***Notary Provider**
DocMagic RON

***Notary Type**
☐ In Person
☒ Remote Online Notary (RON)

Search

Company Name	First Name	Last Name	Client ID
			TEST

City County State Zip

MD ☒ RON Capable **Search**

Signers **Notaries**

	Notary Name	Email	Status	Yes
<input type="radio"/>	DOCAGIC NOTARY	emily@docmagic.com	Yes	Yes
<input type="radio"/>	DOCAGIC NOTARY	eugener@docmagic.com	Yes	Yes
<input checked="" type="radio"/>	DOCAGIC NOTARY	struitt@docmagic.com	Yes	Yes
<input type="radio"/>	DOCAGIC NOTARY	alexh@docmagic.com	Yes	Yes
<input type="radio"/>	DOCAGIC NOTARY	dmitri@docmagic.com	Yes	Yes

Request Summary

1 participants for a RON eClosing for a property in Sample, NJ.

*Estimate Closing Date: 12/21/2022 *Time: 01:00 PM America/Los Angeles

Cancel **Request Notary Services**

Start by entering your search parameters for a DocMagic Remote Online Notary and hit Search. Please note that entering too many search parameters will limit the results that appear.



Assign a Notary

Select your notary from the results that appear by clicking the bubble next to their name.

Assign / Notify Notary

***Notary Provider**
DocMagic RON

***Notary Type**
☐ In Person
☒ Remote Online Notary (RON)

Search

Company Name	First Name	Last Name	Client ID
			TEST
City	County	State	Zip
		MD	

☒ RON Capable **Search**

Signers **Notaries**

<input type="radio"/>	DOCMAGIC NOTARY emily@docmagic.com	emily@docmagic...	Yes	Yes
<input type="radio"/>	DOCMAGIC NOTARY eugener@docmagic.com	eugener@docmag...	Yes	Yes
<input checked="" type="radio"/>	DOCMAGIC NOTARY struitt@docmagic.com	struitt@docmagic...	Yes	Yes
<input type="radio"/>	DOCMAGIC NOTARY alexh@docmagic.com	alexh@docmagic...	Yes	Yes
<input type="radio"/>	DOCMAGIC NOTARY dmitri@docmagic.com	dmitri@docmagic...	Yes	Yes

Request Summary

1 participants for a RON eClosing for a property in Sample, NJ.

*Estimate Closing Date: 12/21/2022 *Time: 01:00 PM America/Los Angeles

Cancel **Request Notary Services**

Please note that you can scroll down to see more results.



Assign a Notary

Scroll down to Request Summary and select your estimated closing date, time (including AM/PM), and time zone.

Assign / Notify Notary

***Notary Provider**
DocMagic RON

***Notary Type**
☐ In Person
☒ Remote Online Notary (RON)

Search

Company Name	First Name	Last Name	Client ID
			TEST
City	County	State	Zip
		MD	

☒ RON Capable **Search**

Signers **Notaries**

	Notary Name / Email	First Name	Last Name	Client ID
<input type="radio"/>	DOCAGIC NOTARY emily@docmagic.com	emily	struitt	TEST
<input type="radio"/>	DOCAGIC NOTARY eugener@docmagic.com	eugener	struitt	TEST
<input checked="" type="radio"/>	DOCAGIC NOTARY struitt@docmagic.com	struitt	struitt	TEST
<input type="radio"/>	DOCAGIC NOTARY alexh@docmagic.com	alexh	struitt	TEST
<input type="radio"/>	DOCAGIC NOTARY dmitri@docmagic.com	dmitri	struitt	TEST

Request Summary

1 participants for a RON eClosing for a property in Sample, NJ.

*Estimate Closing Date: 12/21/2022 *Time: 01:00 PM America/Los Angeles

Cancel **Request Notary Services**

Click "Request Notary Services" when done.



Ready to Close

Once all the documents have been uploaded and prepared for execution, click on "Ready to Close" to alert the Notary, if a Remote Online Notary is required.

DocMagic eClose Console (Settlement Agent) Sally ▾

LOAN Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[Details](#) [eJournal](#) [Action Log](#) [Ready to Close](#)

Signers (2) [NotaryCam](#) [Notify](#)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (16) [Preview Mode](#) ☒

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

Note: This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose.



Preview Mode Off

Preview Mode will turn off automatically when the Clock hits Zero and signing begins. To be safe, check that Preview Mode is off the day of signing.

DocMagic eClose Console (Settlement Agent) Sally ▾

LOAN
Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
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COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

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

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (16)

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

Preview Mode ☐ off



Your Turn to Sign

The Settlement Agent can eSign by clicking on the Open Signing Room Button.

DocMagic eClose Console (Settlement Agent) Sally ▾

LOAN Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[Details](#) [eJournal](#) [Action Log](#) [Ready to Close](#)

Signers (2) [Notify](#)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			Finished	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				Ready to	Open Signing Room

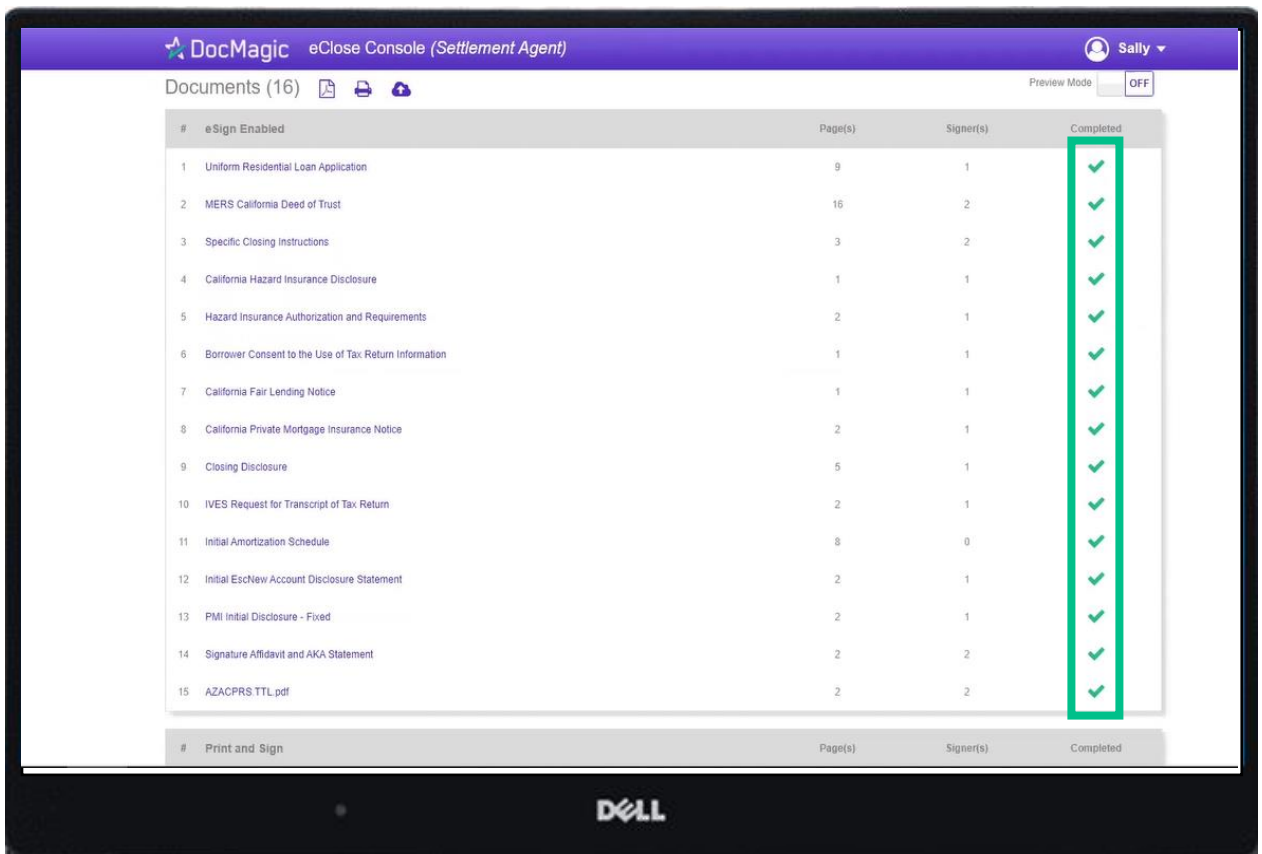
Documents (16) [Preview Mode](#) ☒

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	
2	MERS California Deed of Trust	16	2	
3	Specific Closing Instructions	3	2	
4	California Hazard Insurance Disclosure	1	1	
5	Hazard Insurance Authorization and Requirements	2	1	
6	Borrower Consent to the Use of Tax Return Information	1	1	



eClose Console Confirmation

When all signed documents have been uploaded and all signatures, fields and Notary stamps have been collected, the Settlement Agent will see a fully completed column on the Right.



DocMagic eClose Console (Settlement Agent) Sally

Documents (16) Preview Mode OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓
7	California Fair Lending Notice	1	1	✓
8	California Private Mortgage Insurance Notice	2	1	✓
9	Closing Disclosure	5	1	✓
10	IVES Request for Transcript of Tax Return	2	1	✓
11	Initial Amortization Schedule	8	0	✓
12	Initial Escrow Account Disclosure Statement	2	1	✓
13	PMI Initial Disclosure - Fixed	2	1	✓
14	Signature Affidavit and AKA Statement	2	2	✓
15	AZACPRS TTL.pdf	2	2	✓

Print and Sign Page(s) Signer(s) Completed

