



Settlement Agent eClose Console with AutoPrep

GUIDEBOOK

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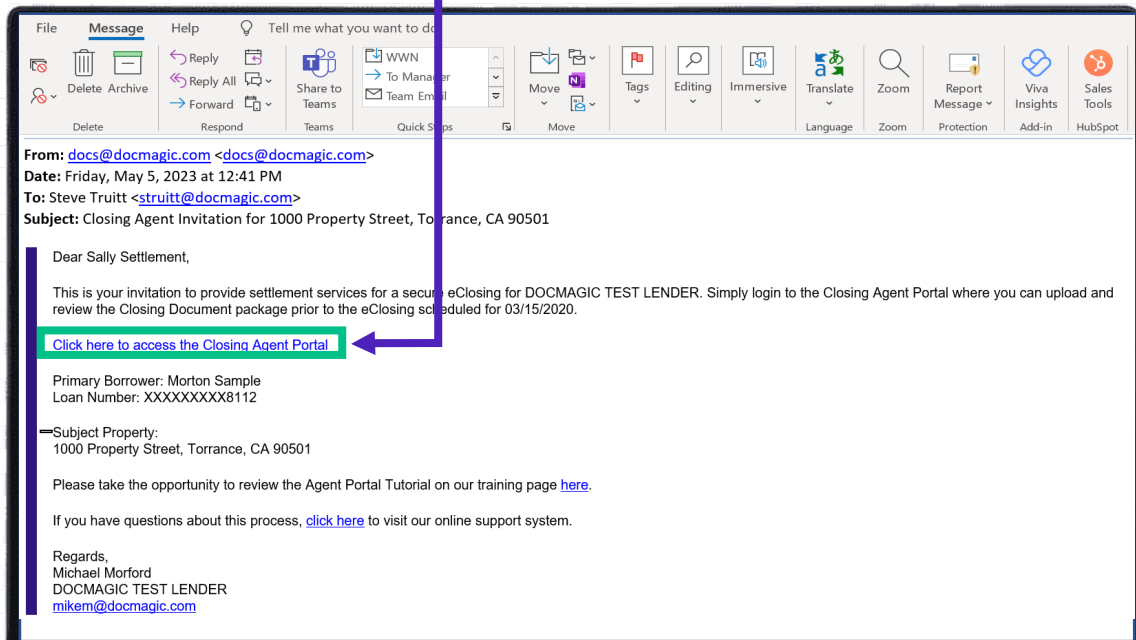
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Settlement Agent Invitation Email

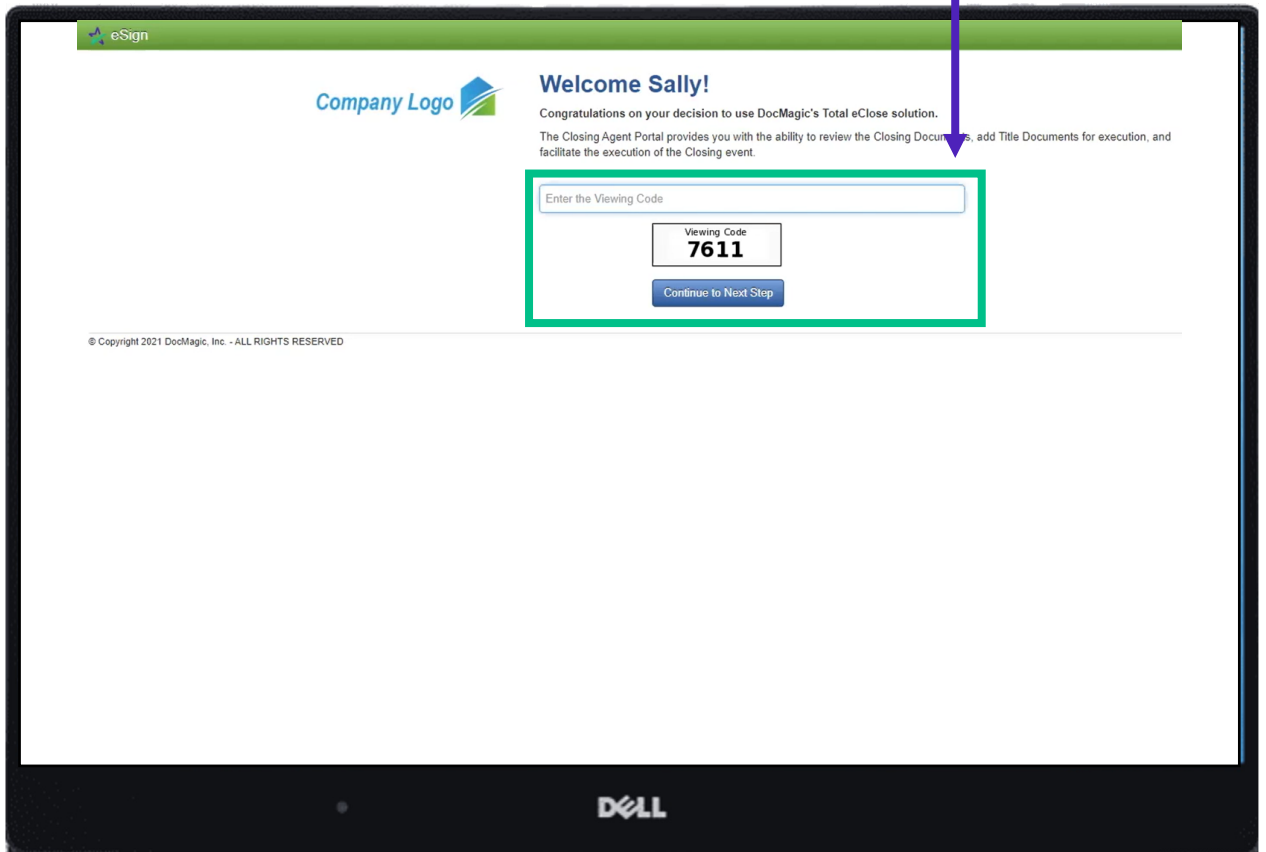
The Settlement Agent will receive an invitation email when the lender creates the eClose event.

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.



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 DocMagic eClose Console (Settlement Agent) interface. At the top, the user is logged in as Sally. The main content area is divided into several sections:

- 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:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 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 shown, all with a checkmark in the Completed column.

#	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_placehold... 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

#	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	✓



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_placehold... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉️ ⓪	📄 ⓪	● 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	✓

DELL



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.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The user profile 'Sally' is visible in the top right corner, with a dropdown menu open showing options: Dashboard, My Account, Preferences, Contact Us, Help (highlighted), and Sign Out. The main content area includes:

- LOAN** section: Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER** section: Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING** section: Shows a countdown timer and a 'Ready to Sign' indicator.
- Signers (2)** table:

#	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_placehold... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉️ ⓪	📄 ⓪
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned			

Below the signers table is a **Documents (15)** section with a 'Preview Mode' toggle set to 'ON'. The document list is as follows:

#	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_placehold... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉️ ⓪	📄 ⓪	● 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	✓

DELL



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 interface. A modal window titled "Participant Details" is open, showing the following information for a participant:

- First Name:** Erica
- Last Name:** Sample
- Email:** erica.sample@example.com
- Phone Number:** () - -
- Access Code:** 0001
- Role:** Borrower

At the bottom of the modal are three buttons: "Cancel", "Delete", and "Save".

In the background, the "Signers (2)" list is visible, with "Erica Sample" highlighted. The "Documents (15)" list includes items such as "Uniform Residential Loan Application", "MERS California Deed of Trust", and "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.

The screenshot displays the DocMagic eClose Console interface. A central dialog box titled "Add Participant" is open, prompting the user to "Add the participant's information below". The dialog box contains the following fields: First Name, Last Name, Email, Phone Number (with a format guide: () - - - - -), Access Code, and Role (with a dropdown menu currently set to "Select Role"). At the bottom of the dialog box, there are "Cancel" and "Add" buttons. The "Add" button is highlighted with a green box. In the background, the console shows loan details (Loan #: 777-1616630796081, Lender: DSI TEST LENDER (SALES)), a countdown timer (COUNTDOWN TO CLOSING), and a list of documents (15 total) with columns for "#", "eSign Enabled", "Signer(s)", and "Completed".

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.

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

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_placehold... 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: 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	✓

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) 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	✉️ ⓪	📄 ⓪	● 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	✓

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.

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: DS...EST LENDER (SALES)
Contact: Michael Morford
Email: m...@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_placehold... 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	✓

DELL

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.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the user's name 'Sally', and the role 'Settlement Agent'. The main content area is divided into several sections:

- 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:** A digital clock showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed), Time: 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 Sign. 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 visible, including 'Uniform Residential Loan Application', 'MERS California Deed of Trust', and 'Specific Closing Instructions'.

A red warning icon is overlaid on the bottom left of the screenshot. A red box highlights the 'Preview Mode ON' toggle switch in the bottom right corner of the document list.

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.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text "eClose Console (Settlement Agent)", and the user name "Sally".

Key sections include:

- 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:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Signers (2):** A table listing Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing various documents such as "Uniform Residential Loan Application", "MERS California Deed of Trust", and "California Hazard Insurance Disclosure".

#	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_placehold... 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

#	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) | 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

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_placehold... 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: 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

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 header includes the DocMagic logo, the text "eClose Console (Settlement Agent)", and a user profile for "Sally". The main content area displays a list of 14 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 contains one document: "Multistate Fixed Rate Note" (3/3 pages, 1 signer, completed).

#	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				
1	Multistate Fixed Rate Note	3/3	1	✓

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Home Contact Privacy Policy Terms of Use

DELL



Adding Documents

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

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

- LOAN** section: Displays loan details such as Loan # (777-1616630796081), Primary Borrower (Erica Sample), Type (EClosing), Package ID (333727), and Worksheet # (1616630796081 (Version: 1)).
- LENDER** section: Displays lender information including Company (DSI TEST LENDER (SALES)), Contact (Michael Morford), Email (mikem@docmagic.com), and Phone ((800) 649-1362).
- COUNTDOWN TO CLOSING** section: Shows a timer for days, hours, minutes, and seconds, with a date of Apr 19, 2023 (Wed) and time of 12:00am PDT.
- Signers (2)** section: 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)** section: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. A document icon button is highlighted with a green box and a blue arrow pointing to it from the callout box above.

#	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	<input type="button" value="Open Signing Room"/>
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	<input type="button" value="Open Signing Room"/>

#	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.

The screenshot displays the DocMagic eClose Console interface. At the top, the user is identified as 'Sally'. The main area is divided into sections for 'LOAN' and 'LENDER' details, a 'COUNTDOWN TO CLOSING' timer, and a list of documents. A file selection dialog box is open over the document list, showing the 'AZACPRS.TTL.pdf' file selected. A green arrow points from the text box above to the 'Browse' button in the dialog box.

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

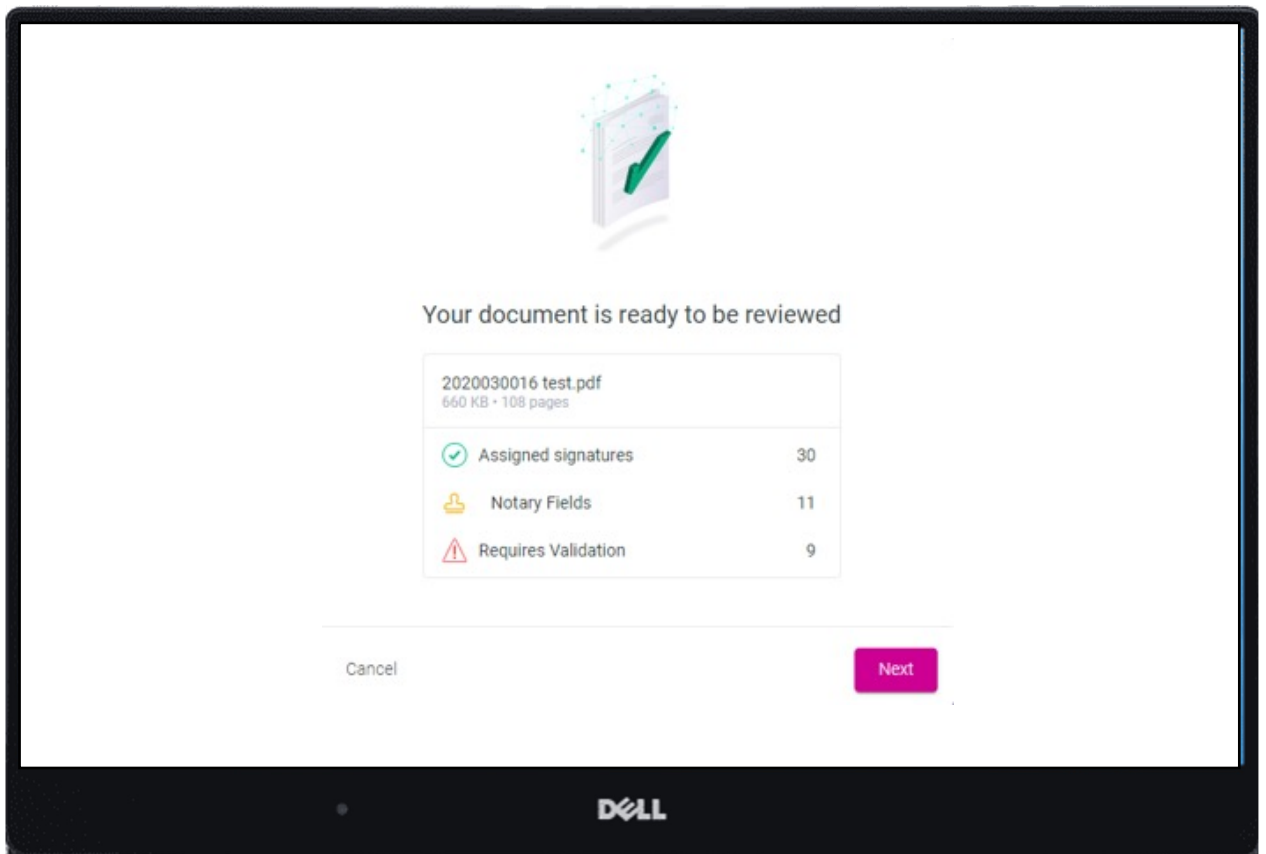
Document List:

Document ID	Document Name	Countdown	Status	eSign
1	California Hazard Insurance Disclosure	1	Not Started	Open Signing Room
2	Hazard Insurance Authorization and Requirements	2	Ready to Sign	Open Signing Room
3	Borrower Consent to the Use of Tax Return Information	1	Completed	



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 DISCLOSURES

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 B
- Were not charged and did not pay any fee except for expressing an intent to proceed.

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

Unassigned

- Sammy Sample
Borrower 1
- Sally Sample
Borrower 2
- To be determined
Notary
- Belinda Helmick
Settlement Agent
- Unspecified
Originator
- Joseph Moore

Unassigned

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 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 _____
County of _____

Subscribed and sworn to (or affirmed) before me on this _____ day of _____
by John Smith

proved to me on the basis of satisfactory evidence to be the person(s) w

Why are you deleting this signature mark?

- Not a signature mark
- Not needed for this transaction

Cancel Delete

DELL



AutoPrep

The borrower will be highlighted in green

The screenshot displays a DocMagic document titled "2020030016 test.pdf". The document text includes: "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." Below this, there is a dropdown menu with "Terry M Mackey (Borrower 1)" selected, followed by the text "- BORROWER - Terry M Mackey - DATE -". Further down, there are fields for "State of _____" and "County of _____". The text "This instrument was acknowledged before me on _____ by Terry M Mackey." is followed by a dropdown menu with "Notary" selected, and "Notary Public" below it. At the bottom, there is a field "My Commission Expires: _____" and a plus sign icon. A green callout bubble with a pencil icon points to the "Terry M Mackey (Borrower 1)" dropdown. A blue callout bubble with a pencil icon points to the "Notary" dropdown. A green box at the top of the page contains the text "The borrower will be highlighted in green". A blue box at the bottom of the page contains the text "Blue indicates a field that needs to be filled out via text/signature".

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 document titled "2020030016 test.pdf" in the DocMagic interface. The document text includes a loan agreement and a date: "DATED this 24th day of April, 2020." Below the date, there is a dropdown menu with "Terry M Mackey (Borrower 1)" selected, followed by the text "- BORROWER - Terry M Mackey - DATE -". Further down, there are fields for "State of" and "County of". The text "This instrument was acknowledged before me on" is followed by a blank line and "by Terry M Mackey." Below this, there is a dropdown menu with "Notary" selected, followed by "Notary Public" and "My Commission Expires:". A plus sign icon in a circle is located at the bottom right of the document area, with a blue arrow pointing to it from a text box below. A green callout bubble with a pencil icon is positioned over the borrower dropdown, and another blue callout bubble with a pencil icon is over the notary dropdown.

A user can fill out blank fields by clicking the plus



AutoPrep

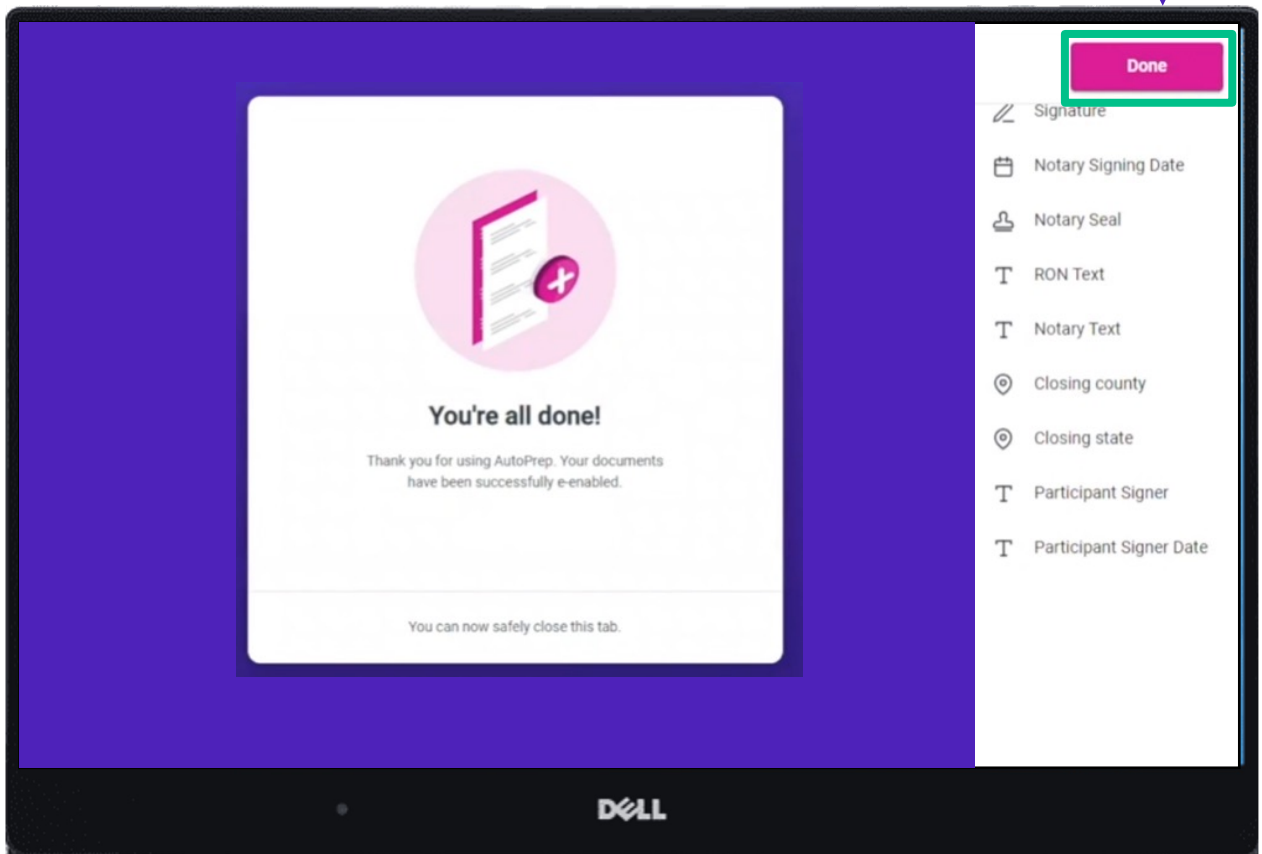
The user is responsible for verifying the correct signer and fields

The screenshot shows a legal document preparation interface. The document text includes: "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." Below this, there are input fields for "Borrower" (set to "Terry Mackey (Borrower 1)"), "State of", and "County of". A section for "Notary" includes fields for "Notary" (set to "Notary Public"), "Notary Signing Date", and "My Commission Expires". A dropdown menu is open on the right side, listing various fields: "Signature", "Notary Signing Date", "Notary Seal", "RON Text", "Notary Text", "Closing county", "Closing state", "Participant Signer", and "Participant Signer Date". A pink "Done" button is at the top right of the menu. Blue callout bubbles are present over several fields, and a purple box at the top contains the text "The user is responsible for verifying the correct signer and fields".



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) [Refresh](#) [Edit](#) [Print](#) [Share](#) [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	✓

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.

The screenshot displays the DocMagic eClose Console (Settlement Agent) interface. At the top, there's a navigation bar with the DocMagic logo, 'eClose Console (Settlement Agent)', and a user profile for 'Sally'. Below this, there are three main sections: 'LOAN' details (Loan #: 71616630796081, Primary Borrower: Erica Sample, Type: Closing, Package ID: 3727, Worksheet #: 16630796081 (Version: 1)), 'LENDER' information (Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362), and a 'COUNTDOWN TO CLOSING' timer (Days: 0, Hours: 0, Minutes: 0, Seconds: 0, Date: Apr 19, 2023 (Wed) Time: 12:00am PDT). Below these are tabs for 'Details', 'eJournal', and 'Action Log', along with a 'Ready to Close' button. The 'Signers (2)' section lists Erica Sample (Borrower) and Sally Settlement (Settlement Agent). The 'Documents (15)' section is highlighted, showing a list of documents with columns for '#', 'eSign Enabled', 'Page(s)', 'Signer(s)', and 'Completed'. A blue arrow points from the text box to a pencil icon in the document toolbar.

#	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@exempl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

#	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 shows the EClosing software interface. At the top, it says "EClosing Prepare documents for signing" and has a "Done" button. A navigation bar contains four tagging options: "Add Signature", "Add Initial", "Add Postfill", and "Add Notary Seal". A green box highlights these options, with a purple arrow pointing from the text above to the "Add Signature" button. On the left, a sidebar shows a list of documents, with the "Closing Disclosure" document selected and highlighted in blue. The main area displays the "Closing Disclosure" form, which includes sections for Closing Information, Transaction Information, Loan Information, Loan Terms, Monthly Principal & Interest, Prepayment Penalty, Balloon Payment, and Projected Payments.

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

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	Does the loan have these features?	
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.

The screenshot shows the EClosing portal interface. At the top left, it says "EClosing Prepare documents for signing". In the top right corner, there is a purple "Done" button. Below the header, there are navigation options: "Add Signature", "Add Initial", "Add Postfill", and "Add Notary Seal". The main content area displays a "Closing Disclosure" document. The document includes sections for Closing Information, Transaction Information, Loan Information, Loan Terms, Monthly Principal & Interest, Prepayment Penalty, Balloon Payment, and Projected Payments. A sidebar on the left shows a list of documents, with the first one selected. The Dell logo is visible at the bottom center of the screen.

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

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

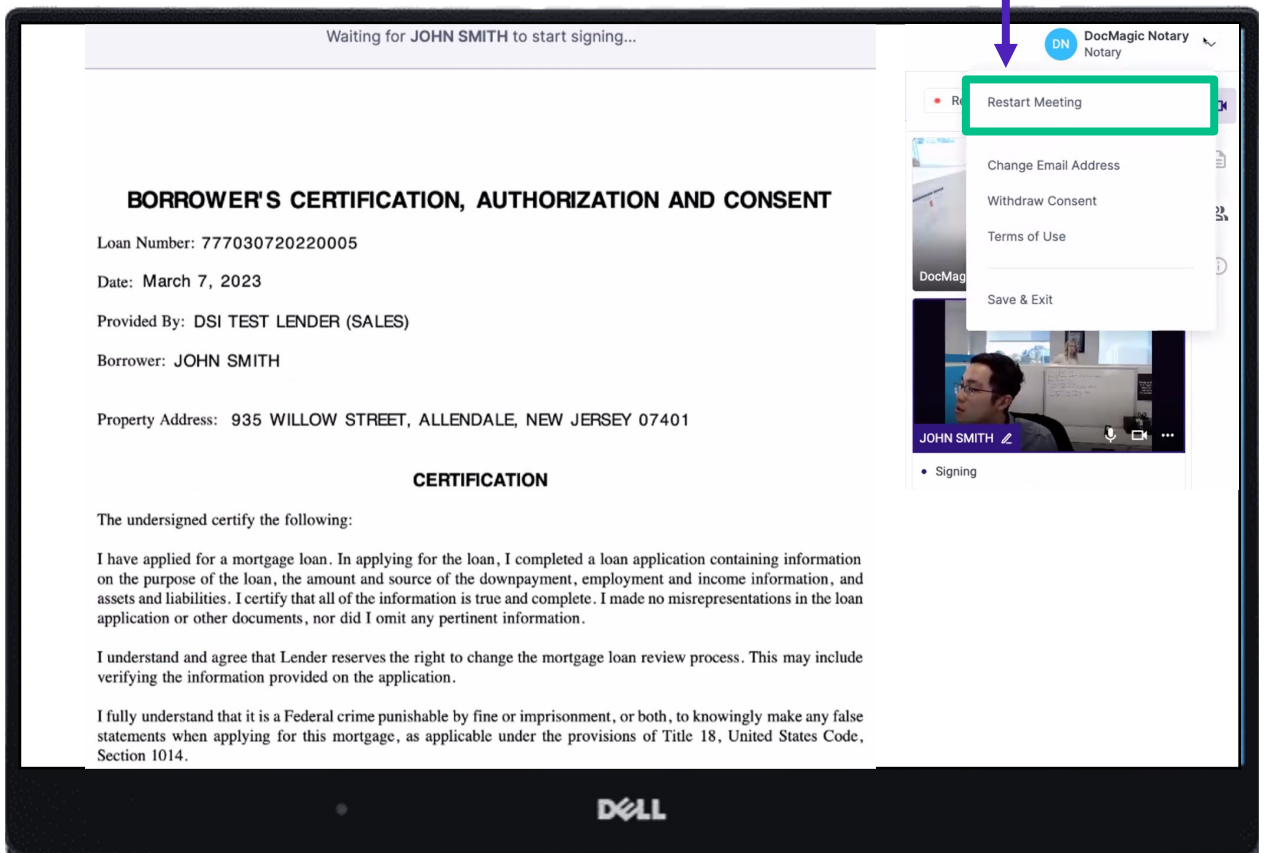
Prepayment Penalty	Does the loan have these features?	
	NO	
Balloon Payment	NO	

Projected Payments	Does the loan have these features?	
Payment Calculation	Years 1 - 7	Years 8 - 30
Principal & Interest	\$761.78	\$761.78



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.



Waiting for JOHN SMITH to start signing...

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.

DocMagic Notary

Restart Meeting

Change Email Address

Withdraw Consent

Terms of Use

Save & Exit

JOHN SMITH

• Signing

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.

The screenshot displays the DocMagic eClose Console interface for a settlement agent named Sally. The page is divided into several sections: LOAN details (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1)), LENDER information (Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362), and a COUNTDOWN TO CLOSING timer (Days: -, Hours: -, Minutes: -, Seconds: -, Date: Apr 19, 2023 (Wed) Time: 12:00am PDT). Below these are tabs for Details, eJournal, and Action Log, along with a Ready to Close button. The Signers (2) section lists Erica Sample (Borrower) and Sally Settlement (Settlement Agent), with buttons for Open Signing Room. The Documents (15) section is highlighted with a green box, showing a list of documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. A printer icon is highlighted with a green box in the document toolbar, and a blue arrow points from the text box above to it.

#	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.

The screenshot displays the DocMagic eClose Console interface. On the left, the 'LOAN' section shows details for Loan # 777-1616630796081, Primary Borrower Erica Sample, Type EClosing, Package ID 333727, and Worksheet # 1616630796081. Below this is a 'Signers (2)' table:

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

Below the signers is a 'Documents (15)' list with a green upload icon highlighted. The right side of the screen shows a document preview with a red-bordered box containing the following text:

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

At the bottom of the document preview, there is a QR code with the text '75605744-1' below it. A blue arrow points from the QR code to the bottom text box.

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. The main content area shows a list of documents with columns for document name, page count, number of signers, and completion status. A green checkmark is visible in the 'Completed' column for the 'Initial Amortization Schedule' document. A separate table at the bottom, highlighted with a green border, shows a summary of documents with the following data:

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

The footer of the console includes the copyright notice: © Copyright 2021 DocMagic, Inc. - ALL RIGHTS RESERVED, and navigation links for Home, Contact, Privacy Policy, and Terms of Use. The Dell logo is also present at the bottom center of the screen.



Don't Confuse These Two!

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

The screenshot displays the DocMagic eClose Console for a Settlement Agent. The interface includes sections for LOAN details, LENDER information, and a COUNTDOWN TO CLOSING timer. Below these are tabs for Details, eJournal, and Action Log. A Signers table lists Erica Sample (Borrower) and Sally Settlement (Settlement Agent). The Documents section shows a list of 15 documents, 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. Two icons are highlighted with green boxes: a document with a plus sign (for new uploads) and a document with a checkmark (for ink-signed uploads). A purple arrow points from the top text box to the plus icon, and another purple arrow points from the bottom text box to the checkmark 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	Open Signing Room
2	Sally Settlement sally.settlement@example.c.	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

#	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.

The screenshot displays the DocMagic eClose Console interface. A modal window titled "Assign / Notify Notary" is open, allowing a user to assign a notary to a closing. The modal includes the following fields and sections:

- *Notary Provider:** A dropdown menu currently set to "Select".
- *Notary Type:** Radio buttons for "In Person" and "Remote Online Notary (RON)".
- Signers:** A table listing the participants for the closing.
- Request Summary:** A section providing details about the closing, including the number of participants, the closing date, and time.
- Buttons:** "Cancel" and "Assign Notary" buttons at the bottom of the modal.

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

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.

The screenshot shows the 'Assign / Notify Notary' dialog box in the DocMagic eClose Console. The 'Notary Provider' dropdown is set to 'WWN' and the 'Notary Type' radio button is selected for 'In Person'. The dialog also shows a list of signers and a request summary.

Signers				
#	Name	Email	Role	Phone
1	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: [] M [] AM America/Los Angeles

Buttons: Cancel, Assign Notary

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



Assign a Notary

Set the closing date and time.

The screenshot displays the DocMagic eClose Console interface. A modal window titled "Assign / Notify Notary" is open, showing the following details:

- Notary Provider:** WVN
- Notary Type:** In Person (selected), 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

Buttons for "Cancel" and "Assign Notary" are visible at the bottom of the modal. A green box highlights the "Assign Notary" button.

Click "Assign Notary" when done.



Assign a Notary

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

The screenshot displays the DocMagic eClose Console interface. A modal window titled "Assign / Notify Notary" is open, showing the configuration for assigning a notary. The "Notary Provider" is set to "NotaryCam". The "Notary Type" field is highlighted with a green box, showing "Remote Online Notary" selected. Below this, a table lists signers, and a "Request Summary" section shows details for a RON eClosing.

#	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

Buttons: Cancel, Assign Notary



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.

The screenshot displays the 'Assign / Notify Notary' dialog box within the DocMagic eClose Console. The dialog is titled 'Assign / Notify Notary' and features a close button (X) in the top right corner. It is divided into several sections:

- Notary Provider:** A dropdown menu with 'NotaryCam' selected. This section is highlighted with a green box.
- Notary Type:** A section with a '*Required' label, containing two radio buttons: 'In Person' (unselected) and 'Remote Online Notary' (selected).
- Signers:** A table listing the participants in the closing.
- Request Summary:** A section with a green border containing the text '1 participants for a RON eClosing for a property in Torrance, CA.' and fields for '*Estimate Closing Date' (3/25/2021), '*Time' (12:00 AM), and 'America/Los Angeles'. This section is highlighted with a green box.
- Buttons:** 'Cancel' and 'Assign Notary' buttons are located at the bottom of the dialog. The 'Assign Notary' button is highlighted with a green box.

The background shows the eClose Console interface with a purple header, a sidebar with 'LOAN' and 'Details' options, and a main area with a 'DOWN TO CLOSING' timer and 'Ready to Close' button. The user's name 'Sally' is visible in the top right corner.

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

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

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.

The screenshot displays the 'Assign / Notify Notary' window in the DocMagic eClose system. The window is divided into several sections:

- Loan Information:** Loan # 777-1, Primary Borrower: Erica, Type: EClose, Package ID: 3337, Worksheet #: 1619.
- Signers (2):** Erica Sample (erica.sample@example.com) and Sally Settlement (sally.settlement@example.com).
- Documents (16):** Uniform Residential Loan Application, MERS California Deed of Trust, Specific Closing Instructions, California Hazard Insurance Disclosure, Hazard Insurance Authorization and R, Borrower Consent to the Use of Tax R.
- Search Form:** Includes fields for Company Name, First Name, Last Name, Client ID (TEST), City, County, State (MD), and Zip. A 'Search' button is present.
- Notary Type:** Remote Online Notary (RON) is selected.
- Search Results:** A table of notaries with a green border. The first result is selected.
- Request Summary:** Shows 1 participant for a RON eClosing for a property in Sample, NJ. The estimated closing date is 12/21/2022 at 01:00 PM in America/Los Angeles.

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

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.

The screenshot displays the 'Assign / Notify Notary' interface. The top section shows the 'Notary Provider' as 'DocMagic RON' and the 'Notary Type' as 'Remote Online Notary (RON)'. Below this is a search form with fields for Company Name, First Name, Last Name, Client ID, City, County, State, and Zip. A search button is located to the right of the search form. Below the search form is a table of notaries:

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

Below the table is the 'Request Summary' section, which is highlighted with a green box. It contains the following information:

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

At the bottom of the interface, there are two buttons: 'Cancel' and 'Request Notary Services'. The 'Request Notary Services' button is highlighted with a green box and a blue arrow points to it from the bottom right.

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

Details eJournal Action Log **Ready to Close** NotaryCam Notify

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@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.



Switching Notaries

If – for whatever reason – you need to assign another notary, click on the “Notify” button, which will activate the selection window.

DocMagic eClose Console (Settlement Agent) | Byron

LOAN | Loan #: 777122120230001
Primary Borrower: Stephen Truitt
Type: EClosing
Package ID: 101462815
Worksheet #: 1138 (Version: 1)

LENDER | Company: D... TEST LENDER (SALES)
Contact: Stephen Truitt
Email: struitt@docmagic.com
Phone: (309) 463-9056

COUNTDOWN TO CLOSING
DAYS: - | HOURS: - | MINUTES: - | SECONDS: -
Date: Jan 9, 2024 (Tue) Time: 10:00am PST

Signers (5)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Stephen Truitt struitt@docmagic.com	Borrower	Tiffany Roberts enotaryoftexas@gmail.com	DocMagic RON 1/9/2024 - 10:00am			Finished	Open Signing Room
2	Byron Settlement struitt@docmagic.com	Settlement Agent					Ready to Sign	Open Signing Room
3	Steve Truitt struitt221@gmail.com	Witness	Tiffany Roberts enotaryoftexas@gmail.com	DocMagic RON 1/9/2024 - 10:00am			Not Started	Open Signing Room
4	Youssef Aissa Ydog@docmagic.com	Witness					Ready to Sign	Open Signing Room
5	Scott Seller scott@seller.com	Seller					Ready to Sign	Open Signing Room

Documents (25) | Preview Mode: OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Freeze/Close Letter	1	1	
2	Multistate Fixed Rate Electronic Note	4	1	
3	Uniform Residential Loan Application	8	2	



Switching Notaries

Making sure DocMagic RON is chosen, click on the icon here to reactivate the search parameters.

The screenshot shows the DocMagic eClose Console interface. A modal window titled "Assign / Notify Notary" is open. In the "Notary Type" section, "Remote Online Notary (RON)" is selected. A search icon in the bottom right corner of the modal is highlighted with a green box and an arrow from the text above. The modal also displays a table of signers and a request summary.

Signers		Notaries	
Company Name	First Name	Last Name	Client ID
City	County	State	Zip
		MD	
<input checked="" type="checkbox"/> RON Capable <input type="button" value="Search"/>			

Signers		Notaries	
Name	Email	Role	Phone
STEPHEN TRUITT	struitt@docmagic.com	Borrower	Home: (310) 555-1212 Mobile: (310) 463-9056
Steve Truitt	struitt221@gmail.com	Witness	

Request Summary

2 participants for a RON eClosing for a property in Indianapolis, MD.

*Estimate Closing Date: 1/9/2024 *Time: 10:00 AM America/Los Angeles



Switching Notaries

Choose the new Notary, making sure to double check the date and time. Then hit "Request Notary Services."

Assign / Notify Notary

Notary Provider: DocMagic RON

Notary Type: In Person Remote Online Notary (RON)

Search

Company Name	First Name	Last Name	Client ID	City	County	State	Zip	RON Capable
DOCAGIC NOTARY	ssamah					NJ		<input type="checkbox"/>
DOCAGIC NOTARY	struitt							<input checked="" type="checkbox"/>
DOCAGIC NOTARY	ward							<input type="checkbox"/>
DOCAGIC NOTARY	youssef							<input type="checkbox"/>
DOCAGIC NOTARY	yportnaya							<input type="checkbox"/>

Request Summary

2 participants for a RON eClosing for a property in Indianapolis, MD.

*Estimate Closing Date: 1/9/2024 *Time: 10:00 AM America/Los Angeles

Buttons: Cancel, Request Notary Services



Switching Notaries

Confirm that you want to switch Notaries, and the new Notary will be notified by email.

The screenshot shows the DocMagic eClose Console interface. A modal dialog titled "Confirm Notary Assignment" is centered on the screen. The dialog contains the text: "You are about to assign a new notary and replace Tiffany Roberts, proceed?". Below the text are two buttons: "Cancel" and "Continue". A blue arrow points from the text box above to the "Continue" button. The background interface shows loan details, lender information, a countdown to closing, a list of signers, and a list of documents.

#	Signer Name / Email	Role	Notary	DocMagic RON	Status	eSign
1	Stephen Truitt struitt@docmagic.com	Borrower	Tiffany Roberts		Finished	Open Signing Room
2	Byron Settlement struitt@docmagic.com	Settlement Agent	Tiffany Roberts		Ready to Sign	Open Signing Room
3	Steve Truitt struitt221@gmail.com	Witness	Tiffany Roberts enotaryoftexas@gmail.com	DocMagic RON 1/9/2024 - 10:00am	Not Started	Open Signing Room
4	Youssef Aiasa Ydog@docmagic.com	Witness			Ready to Sign	Open Signing Room
5	Scott Seller scott@seller.com	Seller			Ready to Sign	Open Signing Room

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Freeze/Close Letter	1	1	✓
2	Multistate Fixed Rate Electronic Note	4	1	✓



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
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	✉	📄	● 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.

The screenshot displays the DocMagic eClose Console for a Settlement Agent. The interface includes sections for Loan details, Lender information, a Countdown to Closing, and a list of Signers. A red box highlights the 'Open Signing Room' button for the Settlement Agent, with a red arrow pointing to it from the text above.

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	● Finished	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

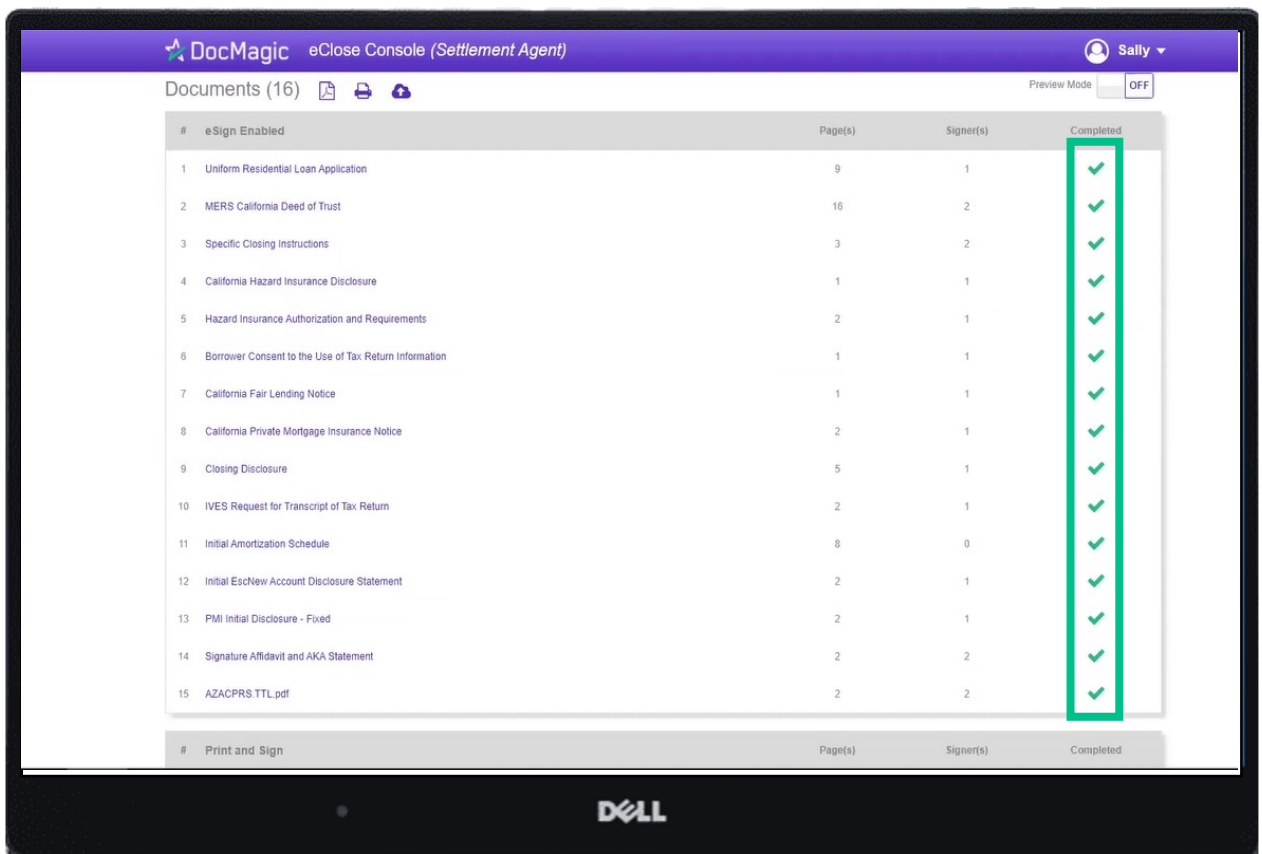
Documents (16)

#	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	✓



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 EscNew 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

