



Settlement Agent eClose Console with AutoPrep™

GUIDEBOOK

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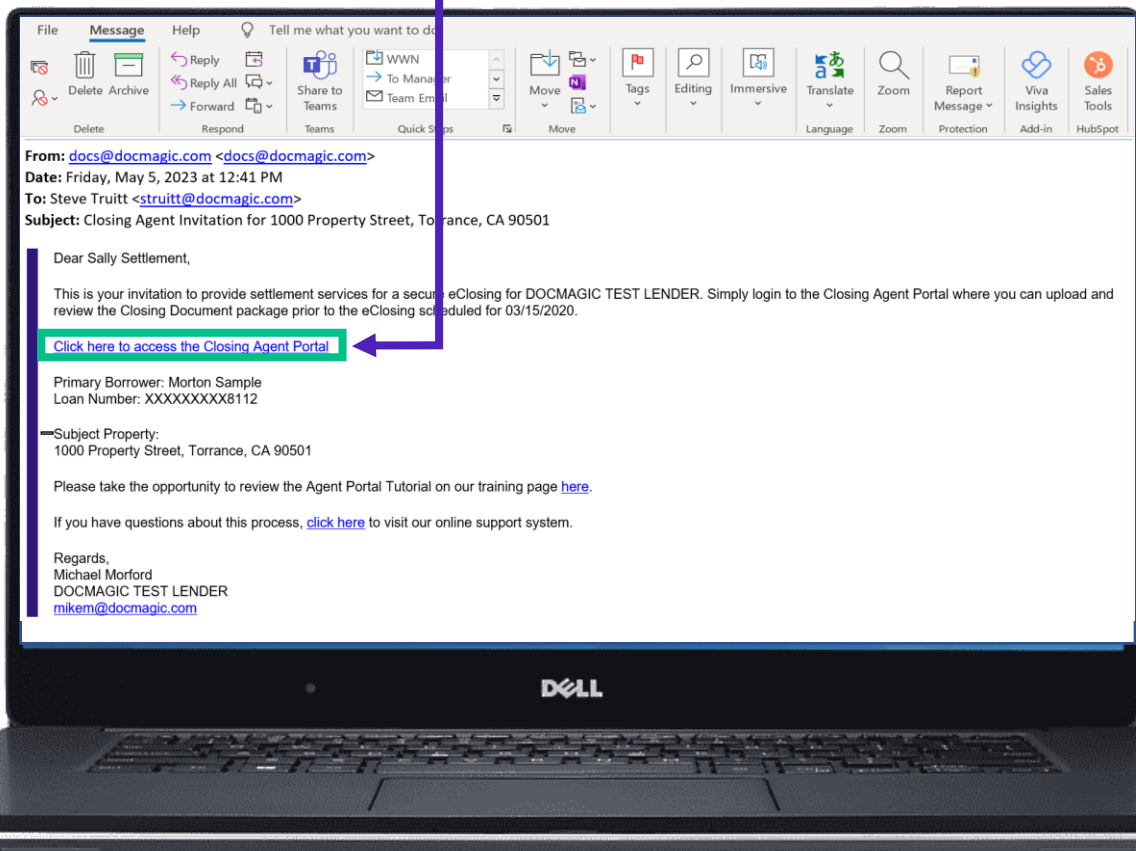
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# Settlement Agent Invitation Email

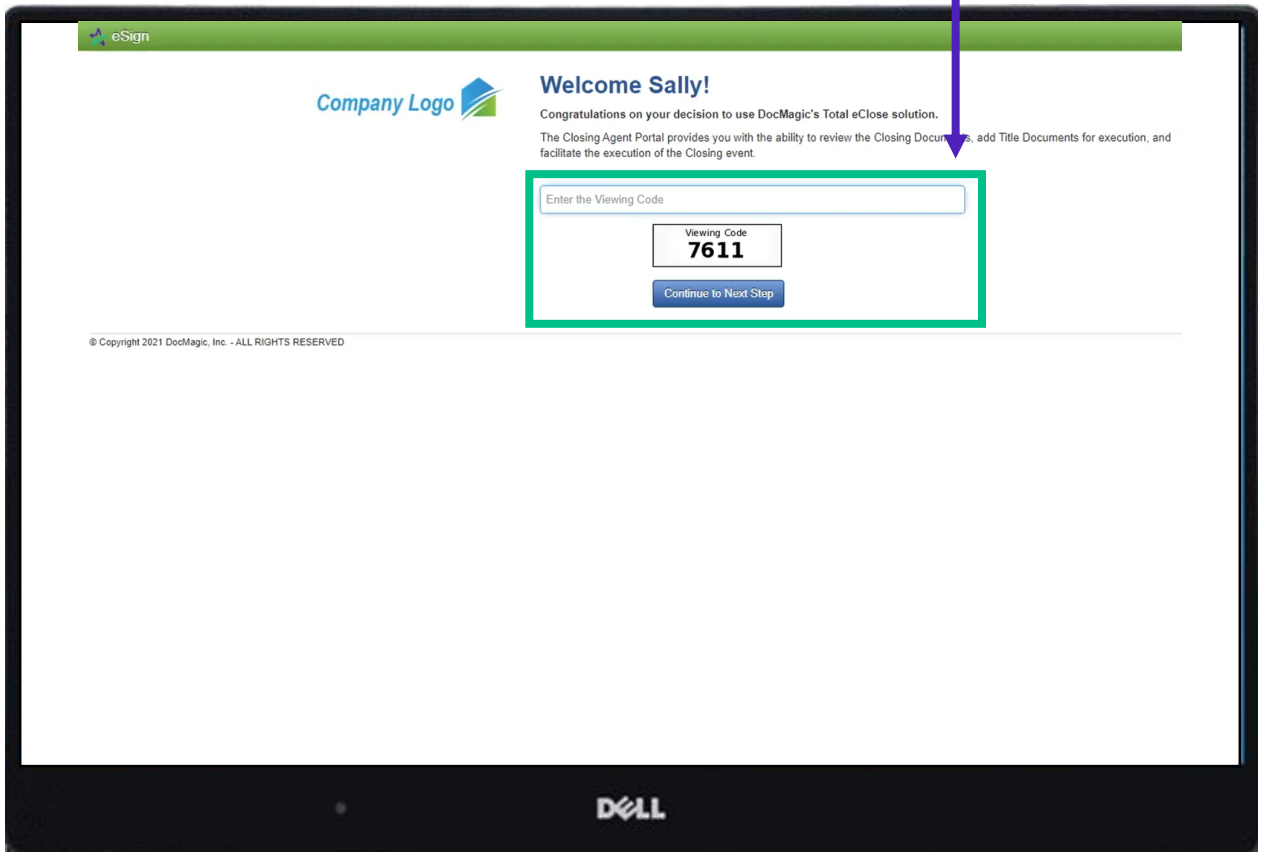
The Settlement Agent will receive an invitation email when the lender creates the eClose event.

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 listed, 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_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

#	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_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	<a href="#">Open Signing Room</a>
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	<a href="#">Open Signing Room</a>

**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.

**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)

Dashboard  
My Account  
Preferences  
Contact Us  
**Help**  
Sign Out

**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_PLACE...	3/25/2021 - 12:00am	📧 ⦿	📷 ⦿
2	Sally Settlement sally.settlement@exampl...	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	<a href="#">Open Signing Room</a>
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	<a href="#">Open Signing Room</a>

**Documents (15)** [New](#) [Edit](#) [Print](#) [Share](#) [Refresh](#) 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, allowing for the management of a signer's information. The modal includes the following fields and options:

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

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 'Add Participant' dialog box is open, prompting the user to enter the following information:

- First Name:
- Last Name:
- Email:
- Phone Number:
- Access Code:
- 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 for Erica Sample, a countdown timer for closing, and a list of 15 documents to be signed.

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 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:** 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. The 'KBA / Status' and 'ID Verify / Status' columns are highlighted with a green box. A purple arrow points from the text above to this box.
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed.

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	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

#	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.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, 'eClose Console (Settlement Agent)', and the user name '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 with the following data:

#	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):** A list of documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed.

#	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 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:** Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER:** Company: DISBEST LENDER (SALES), Contact: Michael Morford, Email: mmorford@docmagic.com, Phone: (866) 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 with columns: #, Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. The 'Notary Type / Closing Date - Time' column for the first signer (Erica Sample) is highlighted with a green box and contains the value '3/25/2021 - 12:00am'. A blue arrow points from the text box above to this cell.
- Documents (15):** A list of documents with columns: #, eSign Enabled, Page(s), Signer(s), and Completed. The list includes: 1. Uniform Residential Loan Application (9 pages, 1 signer, completed), 2. MERS California Deed of Trust (16 pages, 2 signers, completed), 3. Specific Closing Instructions (3 pages, 2 signers, completed), 4. California Hazard Insurance Disclosure (1 page, 1 signer, completed), 5. Hazard Insurance Authorization and Requirements (2 pages, 1 signer, completed), 6. Borrower Consent to the Use of Tax Return Information (1 page, 1 signer, completed).

**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) 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

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	Open Signing Room
2	Sally Settlement sally.settlement@exempl...	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's Statement of Tax Return Information	1	1	✓

Preview Mode

**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 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 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. The table is highlighted with a green border.

#	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.

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:** 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: 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. A green box highlights this table, and a blue arrow points from the text 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	✓





# 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 displays the DocMagic eClose Console interface for a Settlement Agent. The main area shows a list of 14 documents with their respective page counts and the number of signers. A green box highlights the 'Print and Sign' section at the bottom, which lists documents that require 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	✓
<b># Print and Sign</b>				
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 loan package. 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 options.
- Documents (15)** section: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed status.

A green box highlights a document icon button in the 'Documents (15)' section, and a blue arrow points from the instruction text above to it.

#	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_FLACE...	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	✓



# Adding Documents

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

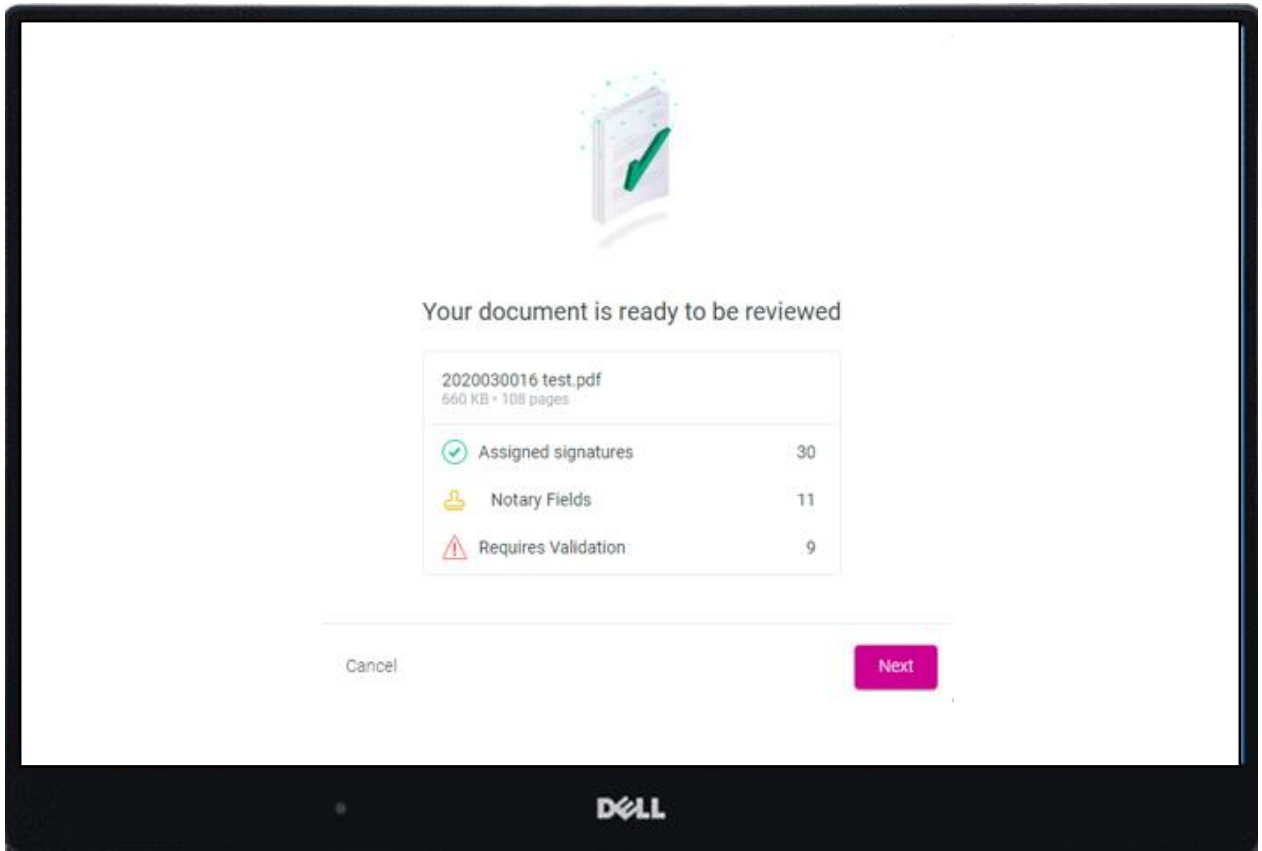
The screenshot displays the DocMagic eClose Console interface. At the top, the user is identified as Sally. The main area is divided into sections for LOAN, LENDER, and a COUNTDOWN TO CLOSING. The LOAN section shows details for Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, and Worksheet #: 1616630796081 (Version: 1). The LENDER section shows Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, and Phone: (800) 649-1362. The 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. A 'Ready to Close' button is visible. Below these sections is a table of documents with columns for 'ID Verify / Status', 'Status', and 'eSign'. A file selection dialog box is open over the table, showing the 'This PC > Desktop' location. The dialog lists several files, with 'AZACPRS.TTL.pdf' selected. The 'File name' field contains 'AZACPRS.TTL.pdf' and the file type is set to 'All Files (\*.\*)'. A green box highlights the 'Browse' button in the dialog, and a blue arrow points from the text above to this button.

ID Verify / Status	Status	eSign
	Not Started	Open Signing Room
	Ready to Sign	Open Signing Room
	Preview Mode ON	
	Completed	
4	California Hazard Insurance Disclosure	1
5	Hazard Insurance Authorization and Requirements	2
6	Borrower Consent to the Use of Tax Return Information	1



# AutoPrep™

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



This screen will confirm the number of signatures, notary fields, and unassigned signatures found.



# Creating Signing Boxes via AutoPrep™

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

The screenshot shows a document titled "APPRAISAL DELIVERY WAIVER" with two checkboxes. A dropdown menu is open, listing "Unassigned", "Sammy Sample Borrower 1", "Sally Sample Borrower 2", "To be determined Notary", "Belinda Helmick Settlement Agent", and "Unspecified Originator". A red callout points to the "Unassigned" option, and a green callout points to the "Sally Sample Borrower 2" option. The document also includes an "ACKNOWLEDGMENT OF INTENT" section with a list of conditions and a signature line for "Borrower SALLY SAMPLE".

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



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



The borrower will be highlighted in green

The screenshot displays a DocMagic document titled "2020030016 test.pdf". The document text includes a loan agreement clause 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, which is highlighted in green. Below this, there is a line for "BORROWER - Terry M Mackey - DATE -". Further down, there are fields for "State of \_\_\_\_\_" and "County of \_\_\_\_\_". A signature line reads "This instrument was acknowledged before me on \_\_\_\_\_ by Terry M Mackey." Below this, there is a dropdown menu with "Notary" selected, which is highlighted in blue. Below the dropdown, there is a line for "Notary Public" and a line for "My Commission Expires: \_\_\_\_\_". A plus sign icon is visible in the bottom right corner of the document area.

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



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

The screenshot displays a DocMagic document editor interface. At the top, the DocMagic logo is visible. Below it, the document title "2020030016 test.pdf" is shown. The main content of the document is a loan agreement. A green callout bubble with a pencil icon points to a dropdown menu containing "Terry M Mackey (Borrower 1)". Below this, the text "- BORROWER - Terry M Mackey - DATE -" is visible. Further down, there are fields for "State of \_\_\_\_\_" and "County of \_\_\_\_\_". A blue callout bubble with a pencil icon points to a signature line. Below the signature line, there is a dropdown menu for "Notary" with "Notary Public" selected. A blue callout bubble with a plus sign points to a plus sign button in the bottom right corner of the document area. The Dell logo is visible at the bottom of the screen.

A user can fill out blank fields by clicking the plus





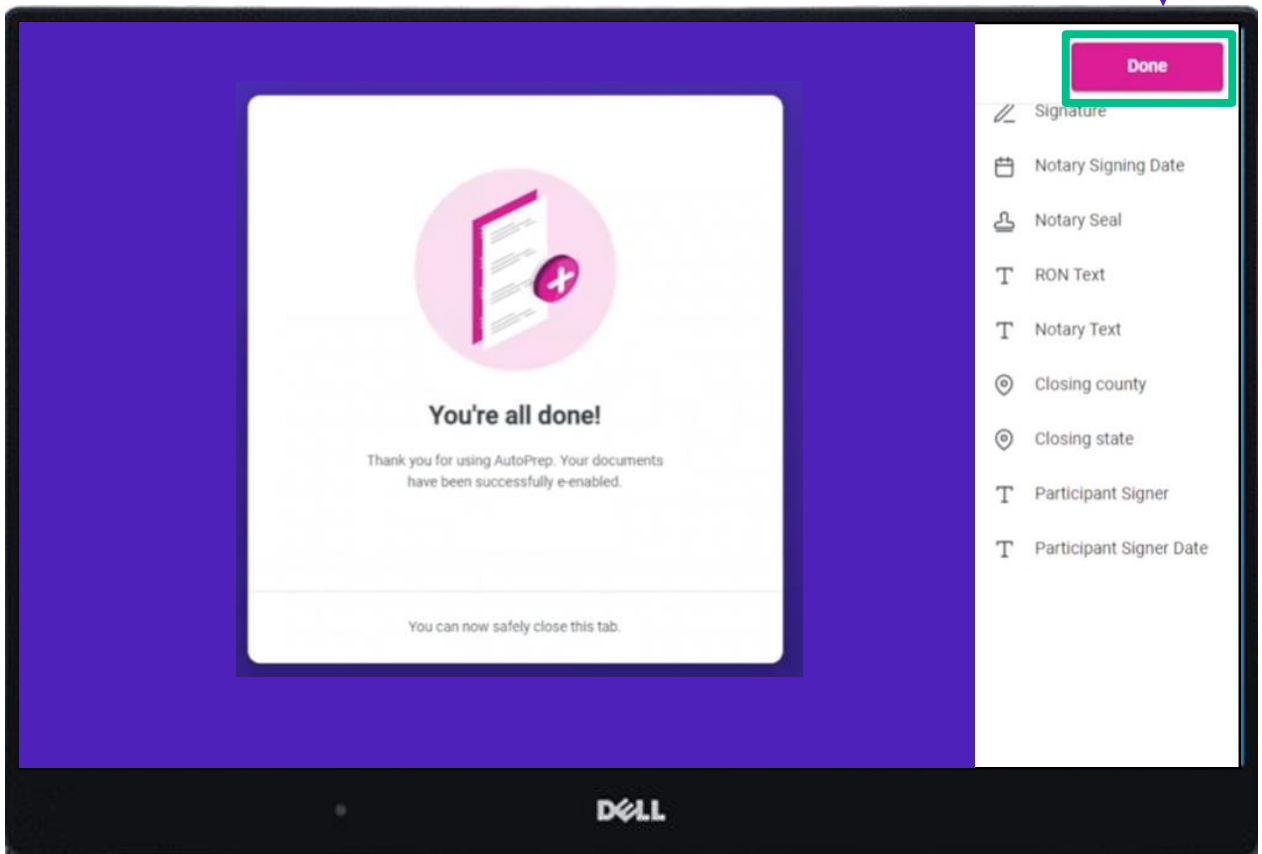
The user is responsible for verifying the correct signer and fields

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" (Terry Mackey (Borrower 1)), "State of", and "County of". A section for "Notary" includes fields for "Notary" (Notary Public) and "My Commission Expires:". A pink "Done" button is in the top right. A green-bordered checklist on the right contains the following items: Signature, Notary Signing Date, Notary Seal, RON Text, Notary Text, Closing county, Closing state, Participant Signer, and Participant Signer Date. Blue callout boxes highlight the Borrower, State, County, and Notary fields. Purple arrows point from the text box above to the Borrower, State, and Notary fields, and from the text box to the checklist.



# 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	<a href="#">Open Signing Room</a>
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	<a href="#">Open Signing Room</a>

**Documents (15)** [Print](#) [Edit](#) [Share](#) [Refresh](#) [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	✓

DELL

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



# Tagging Documents + Guide

Click on the Pencil Icon to open the Document Editor that allows you to tag documents. *We strongly advise you to click [here](#) for the Document Editor guide.*

The screenshot displays the DocMagic eClosing Console interface. At the top, there are sections for LOAN, LENDER, and SETTLEMENT AGENT. Below these is a 'Signers (3)' table and a 'Documents (6)' table. A pencil icon is highlighted in the Documents table, and a document editor window is shown in the foreground.

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

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	<input checked="" type="checkbox"/>	

**California Deed of Trust (MERS)**  
Prepare documents for signing.

**BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION**

I understand, acknowledge, and agree that the Lender and Other Loan Participants can obtain, use and share tax return information for the purpose of:

- (i) providing an offer;
- (ii) originating, maintaining, managing, monitoring, servicing, selling, assigning, and securitizing a loan; or
- (iii) an otherwise permitted by applicable laws, including state and federal privacy and data security laws; or
- (iv) marketing.

The Lender includes the Lender's affiliates, agents, service providers and any of aforementioned parties' successors and assigns.

The Other Loan Participants includes any actual or potential owners of a loan resulting from your loan application, or acquires or any beneficial or other interest in the loan, any mortgage insurers, guarantors, any servicers or service providers for these parties and any of aforementioned parties' successors and assigns.

**John Smith**

Borrower: JOHN SMITH      Date:      Borrower:      Date:

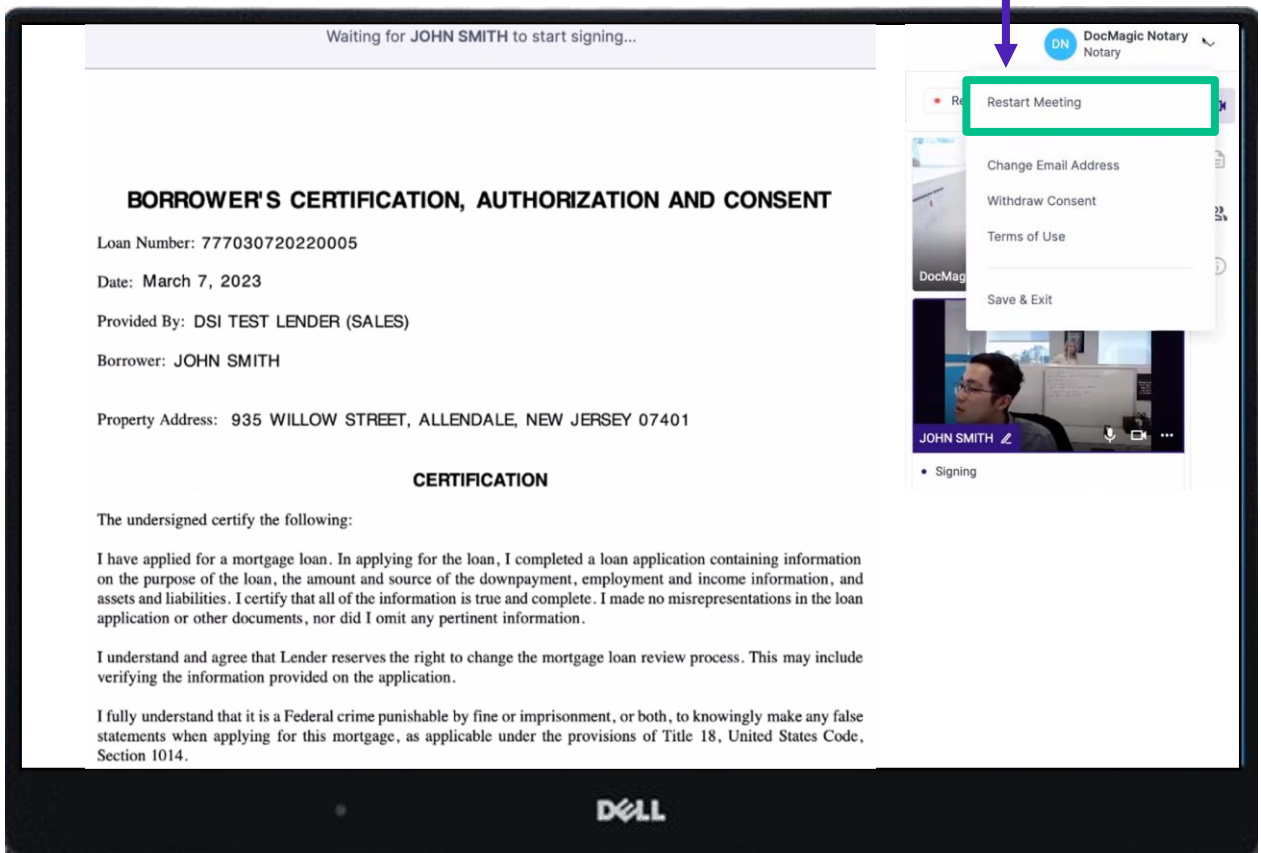
Previous Page      Next Page

- Tags
- Signature & Initials
  - Signature
  - Initials
- Postfill
  - Textbox
  - Phone Number
  - Date
  - Checkbox
  - Radio
- Notary Field
  - Signature
  - Notary Seal
  - Notarization State
  - Notarization County
  - Signing Date
  - Notary Name
  - RON text
  - Commission Expiration
  - Appearance Day



# 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 a web interface for a notary signing session. At the top, a status bar reads "Waiting for JOHN SMITH to start signing...". The main content area is titled "BORROWER'S CERTIFICATION, AUTHORIZATION AND CONSENT" and contains the following text:

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 of the interface, there is a user profile for "JOHN SMITH" with a dropdown menu. The menu options are: Restart Meeting (highlighted with a green box), Change Email Address, Withdraw Consent, Terms of Use, and Save & Exit. A purple arrow points from the text box above to the "Restart Meeting" option. Below the menu is a video feed of the borrower, JOHN SMITH, with a "Signing" indicator.

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.

The screenshot shows the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo and the text 'eClose Console (Settlement Agent)'. Below the navigation bar, there are four main sections: LOAN, LENDER, SETTLEMENT AGENT, and COUNTDOWN TO CLOSING. The LOAN section displays details for Loan # 163648191601, Primary Borrower John Smith, Type EClosing, Package ID 417659, and Worksheet # 163648191601 (...). The LENDER section shows Company SAMPLE SONS L..., Contact Michael Morford, Email mikem@docmagic..., and Phone (555) 555-5555. The SETTLEMENT AGENT section shows Company Settlement Closing..., Contact Sally Settlement, Email struitt@docmagic.c..., and Phone (987) 555-4321. The COUNTDOWN TO CLOSING section shows a timer for DAYS, HOURS, MINUTES, and SECONDS, with the date Apr 19, 2023 (Wed) and time 12:00am PDT. Below these sections are tabs for Details, eJournal (highlighted with a green box), and Action Log. The eJournal tab is selected, and a blue arrow points from it to a dropdown arrow in the 'Journal' table. The 'Journal' table has columns for #, Signer, and Notarization Date and Time, with one entry for John Smith on November 9, 2021. The 'Recordings' table has columns for #, File, and Date Recorded, with one entry for a file named 417659\_2021-11-09T18:27:54.132Z.mp4 recorded on November 9, 2021. A blue arrow points from the dropdown arrow in the 'Journal' table to a text box at the bottom of the page.

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. The top navigation bar includes the DocMagic logo, 'eClose Console', and the user's name 'Sally'. The main content area is divided into several sections:

- LOAN**: Loan #: 777-16166307990, 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. A green box highlights the printer 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			● Not Started	Open Signing Room
2	Sally Settlement sally.settlementi@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	✓

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.settlmeni@exampl...	Settlement Agent	Inassigned

Below the signers is a 'Documents (15)' list with an 'eSign Enabled' column:

#	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

On the right, a document preview is shown 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 green box highlights the QR code, and a blue arrow points from the 'Upload' icon in the document list to the QR code.

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 14 documents, each with a number, title, page count, and number of signers. A green checkmark is visible in the 'Completed' column for document 11, 'Initial Amortization Schedule'. A second table at the bottom, titled '# Print and Sign', shows a document 'Multistate Fixed Rate Note' with 3/3 pages, 1 signer, and a green checkmark in the 'Completed' column. A blue arrow points from the text box above to the green checkmark in the second table.

#	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 displays the DocMagic eClose Console for a Settlement Agent. The interface includes sections for LOAN details, LENDER information, and a COUNTDOWN TO CLOSING. 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 documents) and a document with a checkmark (for ink-signed documents).

#	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, overlaying the main application. The modal contains the following elements:

- Notary Provider:** A dropdown menu with "Select" as the current value.
- Notary Type:** Two radio button options: "In Person" and "Remote Online Notary (RON)".
- Signers:** A table with the following data:

Name	Email	Role	Phone
JOHN SMITH	aland@docmagic.com	Borrower	Home: (502) 767-8509 Mobile: (562) 652-2578
- Request Summary:** A text box stating "1 participants for a In Person eClosing for a property in Sample, NJ." Below this, there are fields for "Estimate Closing Date" (2/14/2023), "Time" (12:00 AM), and "America/Los Angeles".
- Buttons:** "Cancel" and "Assign Notary" buttons are located at the bottom of the modal.

The background application shows a "LOAN" summary, a list of "Signers (2)" including Erica Sample and Sally Settlement, and a list of "Documents (16)" such as "Uniform Residential Loan App" and "MERS California Deed of Trust".

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

- Notary Provider:** WWN (highlighted with a green box)
- Notary Type:** In Person (selected with a radio button, highlighted with a green box)
- Signers:** A table with columns for Name, Email, Role, and Phone. One signer is listed: JOHN SMITH, aland@docmagic.com, Borrower, with Home and Mobile phone numbers.
- Request Summary:** 1 participants for a In Person eClosing for a property in Sample, NJ. Includes fields for Estimate Closing Date (2/14/2023), Time, and Location (America/Los Angeles).

Buttons for "Cancel" and "Assign Notary" are visible at the bottom of the modal. The background shows a sidebar with "Signers (2)" and "Documents (16)" lists, and a top navigation bar with "DocMagic eClose Console (Settlement Agent)" and a user profile for "Sally".

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**  
WVN

**\*Notary Type** *\*Required*  
 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.

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

- Notary Provider:** NotaryCam
- Notary Type:** Remote Online Notary (selected)

The background interface shows a loan request summary with the following information:

- Request Summary:** 1 participants for a RON eClosing for a property in Torrance, CA.
- Estimate Closing Date:** 3/25/2021
- Time:** 12:00 AM
- Location:** America/Los Angeles

The interface also includes a "Signers (2)" table and a "Documents (16)" list.

#	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...				

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

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.
- Notary Type:** A required field with two options: 'In Person' (radio button) and 'Remote Online Notary' (radio button, selected).
- Signers:** A table listing the participants in the closing.
- Request Summary:** A section providing details about the closing request.
- Buttons:** 'Cancel' and 'Assign Notary' buttons at the bottom.

#	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

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
<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**

Start by entering your search parameters for a DocMagic Remote Online Notary and hit Search.

**Note:** The search functions only returns 25 results. If you do not see your notary, please try a more specific search.



# 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:

- Search Form:** Includes fields for 'Notary Provider' (set to 'DocMagic RON'), 'Notary Type' (radio buttons for 'In Person' and 'Remote Online Notary (RON)'), and a search grid with columns for 'Company Name', 'First Name', 'Last Name', 'Client ID', 'City', 'County', 'State', and 'Zip'. A 'Search' button is located at the bottom right of the grid.
- Search Results:** A table with columns for selection, name, email, and status. The third row is selected with a radio button.
- Request Summary:** Shows '1 participants for a RON eClosing for a property in Sample, NJ.' and includes fields for 'Estimate Closing Date' (12/21/2022), 'Time' (01:00 PM), and 'America/Los Angeles'.
- Buttons:** 'Cancel' and 'Request Notary Services' buttons are at the bottom.

	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

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

**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

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

**Ready to Close**

**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	✓

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.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent named Byron. The interface includes sections for LOAN details, LENDER information, and a COUNTDOWN TO CLOSING timer. Below these are navigation tabs for Details, eJournal, and Action Log. The main section is titled 'Signers (5)' and contains a table with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. A 'Notify' button is highlighted with a green box, and a blue arrow points from the text box above to it. Below the signers table is a 'Documents (25)' section with a table showing document details.

#	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 Ydsg@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	
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.

**Assign / Notify Notary**

**\*Notary Provider**  
DocMagic RON

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

**Signers**      **Notaries**

Company Name	First Name	Last Name	Client ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

City	County	State	Zip	<input type="checkbox"/> RON Capable	Search
<input type="text"/>	<input type="text"/>	MD	<input type="text"/>	<input checked="" type="checkbox"/>	<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: NJ Zip:  RON Capable **Search**

Signers	Notaries
<input type="radio"/>	DOCMAGIC NOTARY ssamah@docmagic.com ssamah@docmagi... Yes Yes
<input checked="" type="radio"/>	DOCMAGIC NOTARY struitt@docmagic.com struitt@docmagi... Yes Yes
<input type="radio"/>	DOCMAGIC NOTARY ward@docmagic.com ward@docmagic.c... Yes Yes
<input type="radio"/>	DOCMAGIC NOTARY youssef@docmagic.com youssef@docmagi... Yes Yes
<input type="radio"/>	DOCMAGIC NOTARY yportnaya@docmagic.com yportnaya@docma... Yes Yes

**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

**Cancel** **Request Notary Services**



# Switching Notaries

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

The screenshot displays the DocMagic eClose Console interface. At the top, the user is logged in as 'Byron'. The main area shows loan details (Loan #: 777122120230001, Primary Borrower: Stephen Truitt) and lender information (DSI TEST LENDER (SALES), Contact: Stephen Truitt). A 'COUNT DOWN TO CLOSING' section shows a timer for July 9, 2024, at 10:00am PST. A 'Signers (5)' table lists participants: Stephen Truitt (Borrower), Byron Settlement (Settlement Agent), Steve Truitt (Witness), Youssef Aissa (Witness), and Scott Seller (Seller). A 'Documents (25)' table lists 'Freeze/Close Letter' and 'Multistate Fixed Rate Electronic Note'. A modal dialog titled 'Confirm Notary Assignment' is centered, asking for confirmation to replace Tiffany Roberts. A blue arrow points from the text box above to the 'Continue' button in the dialog.

#	Signer Name / Email	Role	Notary	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	Not Started	Open Signing Room
4	Youssef Aissa Ydog@docmagic.com	Witness	Tiffany Roberts	Ready to Sign	Open Signing Room
5	Scott Seller scott@seller.com	Seller	Tiffany Roberts	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

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	✉️	🔍	● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exempl...	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

Ready to Close

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@exempl...	Settlement Agent	Unassigned				● Ready to	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 ON

DELL



# 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.

#	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	✓

