



Settlement Agent eClose Console with AutoPrep™

GUIDEBOOK

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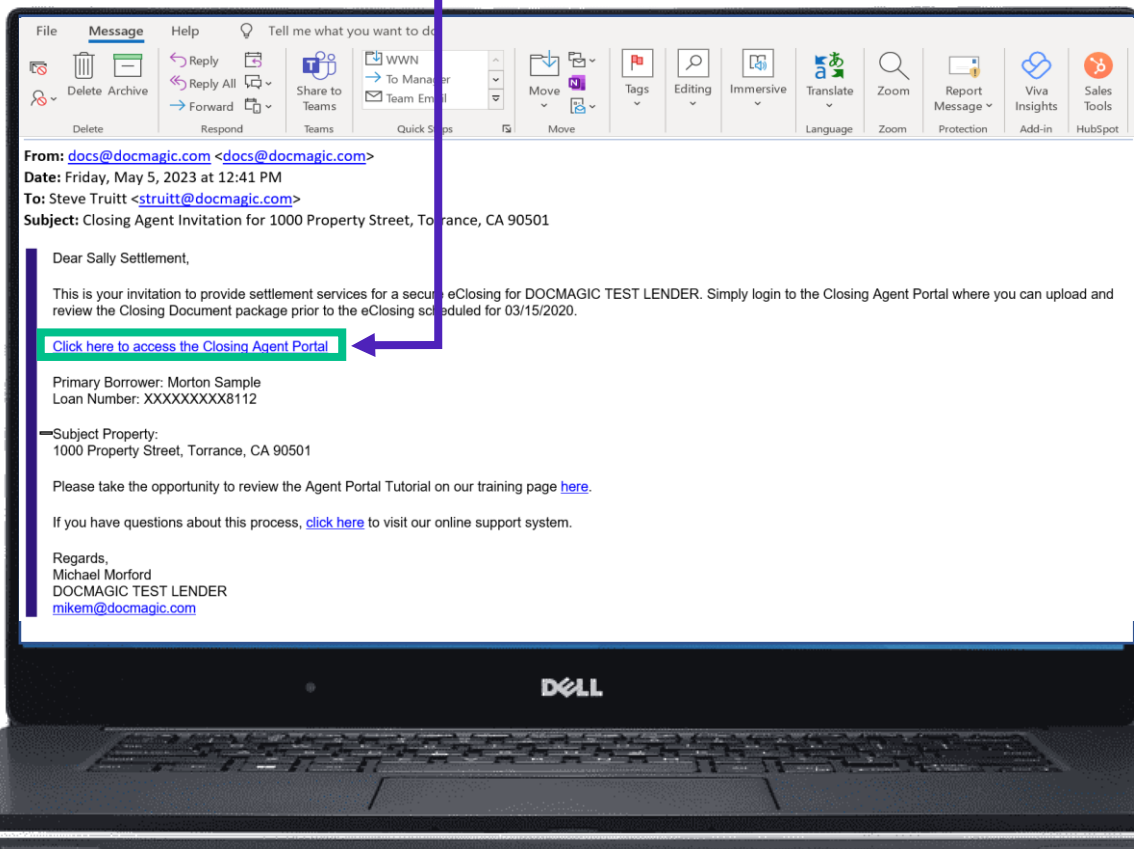
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# Settlement Agent Invitation Email

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.

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

eSign

Company Logo

**Welcome Sally!**

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

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

Enter the Viewing Code

Viewing Code  
**7611**

Continue to Next Step

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# eClose Console

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

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



**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@example...	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	✓



# 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			● 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_placehold... 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	✓

**DELL**



# 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)** Preview Mode ☒

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





# Signer's Details

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

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

**Participant Details**

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

**First Name:** Erica

**Last Name:** Sample

**Email:** erica.sample@example.com

**Phone Number:** ( ) - -

**Access Code:** 0001

**Role:** Borrower

Cancel Delete Save



# Adding Participants

Click on the Silhouette Icon to add a participant.

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

The screenshot shows the DocMagic eClose Console (Settlement Agent) interface. A purple arrow points from the 'Signers (2)' section to the 'Add Participant' dialog box. The dialog box has fields for First Name, Last Name, Email, Phone Number, Access Code, and Role. A green box highlights the 'Add' button at the bottom right of the dialog. Another purple arrow points from the 'Add' button to the 'Add Participant' dialog box. The background interface includes a 'LOAN' section with details like Loan #, Primary Borrower, Type, Package ID, and Worksheet #. It also has a 'LENDER' section with Company information. A 'COUNTDOWN TO CLOSING' section shows days, hours, minutes, and seconds. There are buttons for 'Ready to Close', 'Assign Notary', 'Open Signing Room', and 'Open Signing Room'. A table at the bottom lists documents and their completion status.

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

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



# Notary - Signer's Tab

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

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

- LOAN**: Displays loan details including Loan # (777-1616630796081), Primary Borrower (Erica Sample), Type (EClosing), Package ID (333727), and Worksheet # (1616630796081 (Version: 1)).
- LENDER**: Displays lender information including Company (DSI TEST LENDER (SALES)), Contact (Michael Morford), Email (mikem@docmagic.com), and Phone ((800) 649-1362).
- COUNTDOWN TO CLOSING**: A timer showing Days, Hours, Minutes, and Seconds. The current date is Apr 18, 2023 (Wed) and the time is 12:00am PDT.
- Signers (2)**: A table listing the signers and their roles. The 'KBA / Status' and 'ID Verify / Status' columns are highlighted with a green box, and a purple arrow points to them from the text box above.
- Documents (15)**: A table listing the documents to be signed, including 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.

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

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

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



# Notary - Signer's Tab

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

**DocMagic eClose Console (Settlement Agent)**

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

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

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

**Signers (2)**

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	<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)**

#	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)**

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

**LENDER**  
Company: DSC TEST LENDER (SALES)  
Contact: Michael Morford  
Email: m.morford@docmagic.com  
Phone: (818) 649-1362

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

**Signers (2)**

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placehold... 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)**

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

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



## Preview Tab

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

**DocMagic eClose Console (Settlement Agent)**

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

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

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

**Signers (2)**

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

**Documents (15)**

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

**Preview Mode** ☒ ON

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



# Documents Section

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

**DocMagic eClose Console (Settlement Agent)**

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

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

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

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

**Signers (2)**

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placehold... 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](#) [Download](#) [Upload](#) [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	✓



# Documents Section

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

**DocMagic eClose Console (Settlement Agent)**

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

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

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

**Signers (2)**

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placehold... 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)**

#	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. At the top, the header shows the DocMagic logo, the text "eClose Console (Settlement Agent)", and a user profile for "Sally". Below the header is a table listing 14 documents. A green box highlights the "Print and Sign" section at the bottom, which contains one document: "Multistate Fixed Rate Note". A blue arrow points from the text box above to this section.

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

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

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DELL



# Adding Documents

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

**DocMagic eClose Console (Settlement Agent)**

**LOAN**  
Loan #: 777-1619630796081  
Primary Borrower: Erica Sample  
Type: EClosing  
Package ID: 333727  
Worksheet #: 1616630796081 (Version: 1)

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

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

**Signers (2)**

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

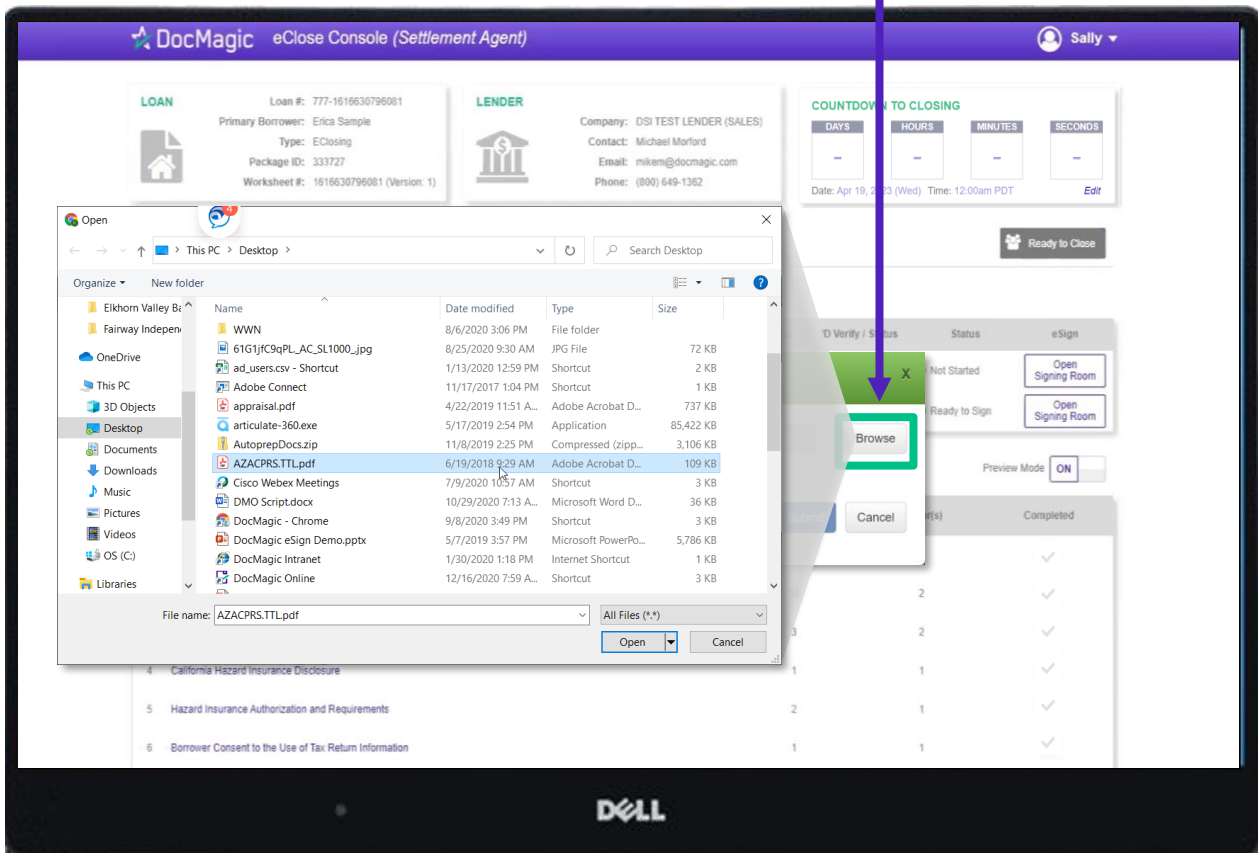
**Documents (15)**

#	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	✓



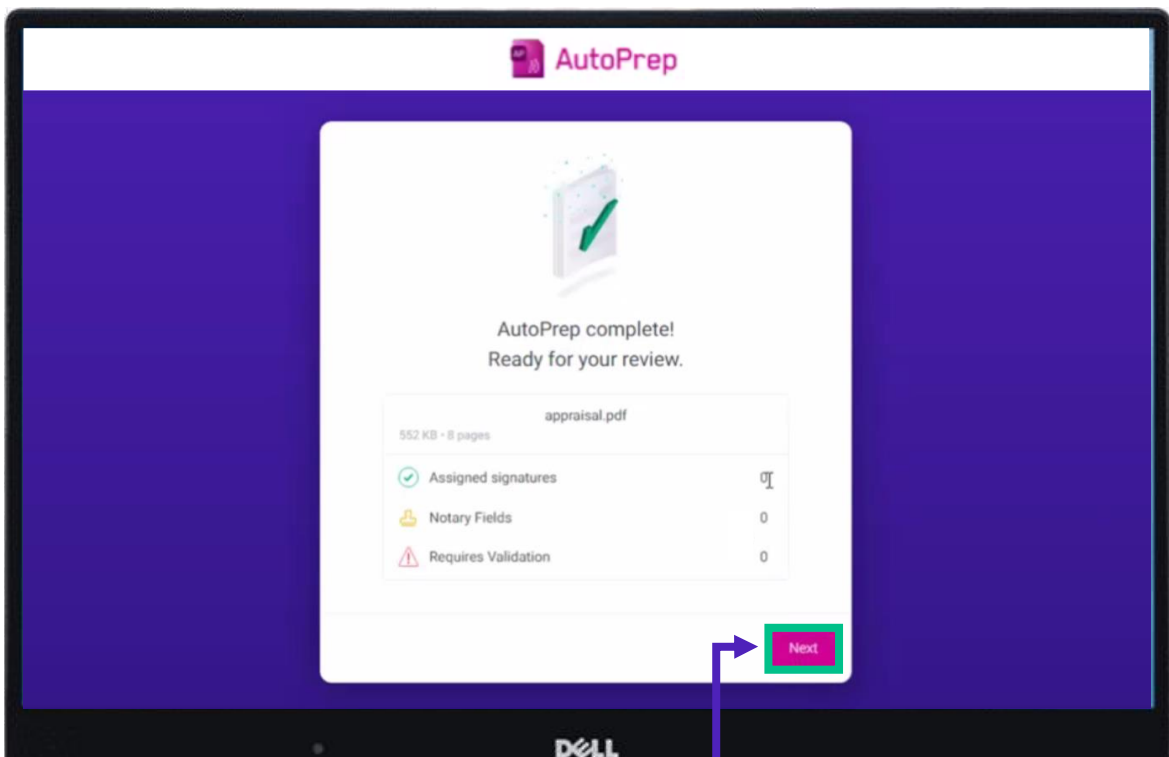
# Adding Documents

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



# AutoPrep

After you Submit, AutoPrep will trigger automatically and start tagging the document. It will detect signature lines and other items that need to be filled out.



AutoPrep is our proprietary software that utilizes optical character recognition and artificial intelligence. For additional information, please visit our [Product Training Page](#). Click Next to continue.



# Document Editor

You'll be brought to the [Document Editor](#) to add or edit any additional fields that AutoPrep may have missed. Click Done in the top right to finalize your changes.

The screenshot shows a document editor interface for a notary document titled "1Johnsandysmith\_title docs.pdf". The document is for "Prepare documents for signing." and is displayed on a Dell monitor. The interface includes a left sidebar with document thumbnails (pages 14 and 15), a central editing area, and a right sidebar with a "Commission Number" field and an "Assigned to" section. The central area contains a notary certificate form with fields for State (CALIFORNIA), County (LOS ANGELES), Notarization Date, and Notarizing Officer. The "Assigned to" section shows "Notary" as the assigned user and "Required" as a status. A "Done" button is highlighted in the top right corner of the editor. A purple arrow points from the text box above to the "Done" button.

1Johnsandysmith\_title docs.pdf  
Prepare documents for signing.

[Space Below This Line For Acknowledgment]

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

State of CALIFORNIA )  
County of LOS ANGELES )  
On Notarization Date before me, \_\_\_\_\_  
Date Here Insert Name and Title of the Notarizing Officer  
personally appeared John Smith AND Sandy Smith  
\_\_\_\_\_  
Name(s) of Signer(s)

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

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

WITNESS my hand and official seal.

Notary Seal

Commission Number

Signature  
Signature of Notary Public

Assigned to  
Notary  
Required

Done



# Settlement Agent Portal – Post AutoPrep™

After going through the document with AutoPrep, 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)**

#	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	<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)** [Add](#) [Edit](#) [Print](#) [Download](#) [Preview Mode](#) ☒

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

Hit refresh and your newly uploaded document will show 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, the header shows 'DocMagic eClosing Console (Settlement Agent)' and a user profile 'Doc'. Below the header, there are three main sections: 'LOAN', 'LENDER', and 'SETTLEMENT AGENT'. The 'LOAN' section includes details like Loan #, Primary Borrower, Type, Package ID, and Worksheet #. The 'LENDER' section shows Company, Contact, Email, and Phone. The 'SETTLEMENT AGENT' section shows Company, Contact, Email, and Phone. A 'COUNTDOWN TO CLOSING' section is also present, showing a timer for Days, Hours, Minutes, and Seconds.

Below these sections, there are tabs for 'Details', 'eJournal', and 'Action Log'. A 'Start eClosing' button is located on the right. The 'Signers (3)' section lists three signers: John Smith (Borrower), Oliver Originator (Originator), and Sally Settlement (Settlement Agent). Each signer has a status and an 'eSign' button.

The 'Documents (6)' section is highlighted with a red box around the pencil icon, indicating the 'Document Editor' functionality. Below this, a preview of a 'Uniform Residential Loan Application' document is shown. The document includes fields for Borrower, Co-Borrower, Mortgage, Amount, Interest Rate, No. of Months, Amortization Type, and Property Information. The 'Signature & Initials' section on the right shows fields for Signature, Initials, PostFill, Textbox, Phone Number, Date, Checkbox, Radio, Notary, and Notary Name.



# 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](#)

**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.

The screenshot displays the DocMagic eClose Console interface. At the top, the header shows 'DocMagic eClose Console (Settlement Agent)' and a user profile for 'Sally'. Below the header, there are sections for '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), and a 'COUNTDOWN TO CLOSING' section (Date: Apr 19, 2023 (Wed) Time: 12:00am PDT). The 'Action Log' tab is highlighted with a green box. Below the tabs, a table lists actions with columns for Date & Time (PST), User Name, IP Address, and Description. The table contains six rows of data. At the bottom of the interface, there is a text input field and a button labeled 'Add Internal Note To Action Log'.

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

Add Internal Note To Action Log

You may also add notes at the bottom.



# Print/Download Documents

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

**DocMagic eClose Console Settlement Agent** Sally ▾

**LOAN** Loan #: 777-16196307960  
Primary Borrower: Erica Sample  
Type: EClosing  
Package ID: 333727  
Worksheet #: 1619630796081 (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@examp...	Settlement Agent	Unassigned				● Ready to Sign	<a href="#">Open Signing Room</a>

**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	✓

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



# Wet-sign Options

Upload signed and scanned documents here.

**DocMagic eClose Console (Settlement Agent)**

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

**LENDER**

**Signers (2)**

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

**Documents (15)**

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

**IMPORTANT**

**YOU MUST USE THIS AS YOUR COVER SHEET.**

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

**INSTRUCTIONS**

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

Loan 777435612  
Pages 25  
From STEVE SAMPLE

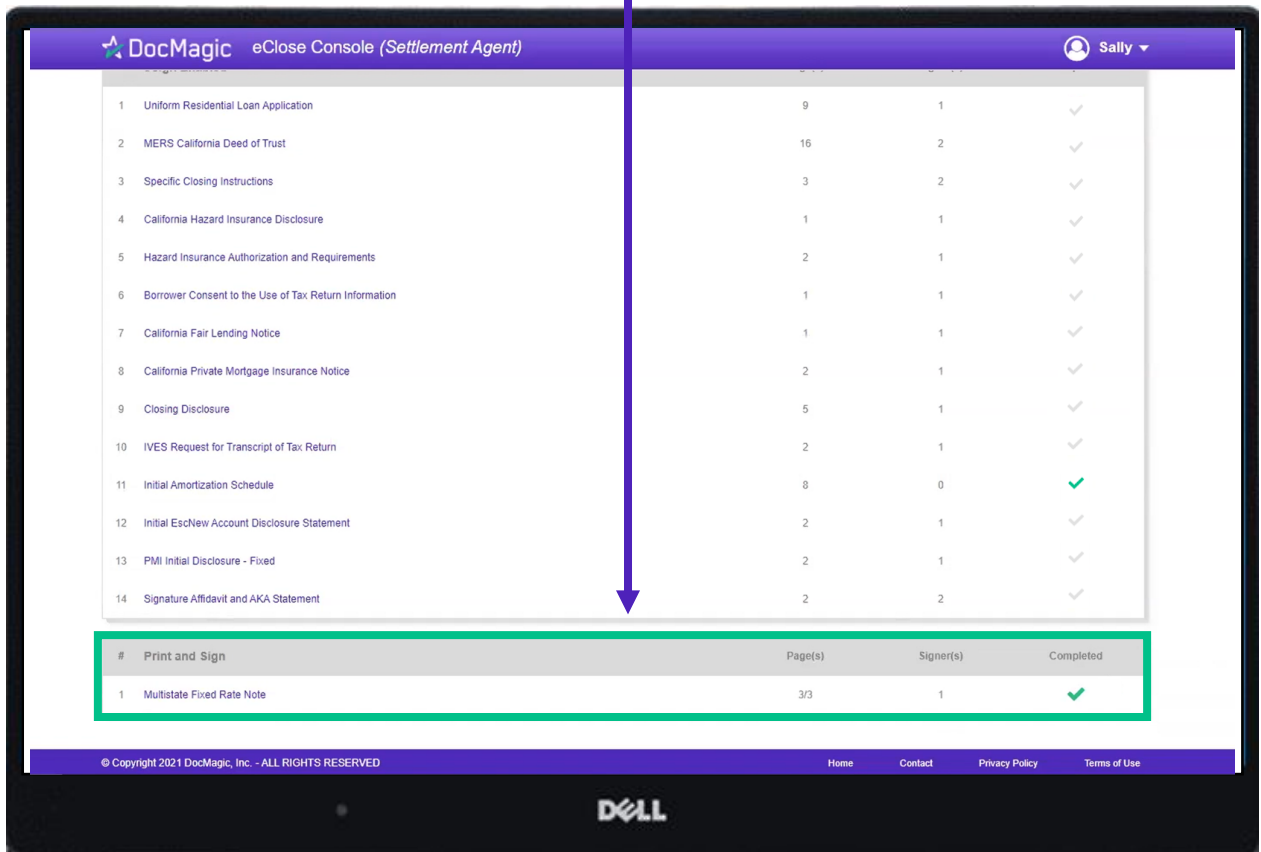
75605744-1

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



# Wet-sign Options

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



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

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



# Don't Confuse These Two!

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

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

- LOAN**: Displays loan details such as Loan #, Primary Borrower, Title, Package, and Worksheet.
- LENDER**: Displays lender information including Company, Contact, Email, and Phone.
- COUNTDOWN TO CLOSING**: A timer showing days, hours, minutes, and seconds remaining until closing.
- Signers (2)**: A table listing the signers, their roles, and their status.
- Documents (15)**: A table listing the documents, their page counts, and their completion status. A red box highlights the 'New Document' icon (a document with a plus sign) in the document list.

#	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 console. The modal contains the following sections:

- Notary Provider:** A dropdown menu with "Select" as the current option.
- Notary Type:** Two radio button options: "In Person" (selected) and "Remote Online Notary (RON)".
- Signers:** A table listing the participants for the closing.

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

Below the signers table is a "Request Summary" section:

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

At the bottom of the modal are two buttons: "Cancel" and "Assign Notary".

In the background, the main console shows a sidebar with "LOAN" details, "Signers (2)" (listing Erica Sample and Sally Settlement), and "Documents (16)". The right sidebar shows a timer, a "Ready to Close" button, and an "Assign Notary" button (highlighted with a green box and a purple arrow).

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



# Assign a Notary

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

**DocMagic eClose Console (Settlement Agent)** Sally

**Assign / Notify Notary**

**\*Notary Provider**: WWN

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

**Signers**

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

**Request Summary**

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

\*Estimate Closing Date: 2/14/2023 \*Time: [ ] M [ ] AM America/Los Angeles

**Documents (16)**

- 1 Uniform Residential Loan App
- 2 MERS California Deed of Trust
- 3 Specific Closing Instructions
- 4 California Hazard Insurance Declaration
- 5 Hazard Insurance Authorization
- 6 Borrower Consent to the Use of Tax Return Information

**Buttons**: Cancel, Assign Notary

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



# Assign a Notary

Set the closing date and time.

**DocMagic eClose Console (Settlement Agent)** Sally ▾

**Assign / Notify Notary** ✕

**\*Notary Provider**  
WWN ▾

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

**DocMagic eClose Console (Settlement Agent)** Sally

**Assign / Notify Notary**

**\*Notary Provider**  
NotaryCam

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

**Signers**

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

**Request Summary**

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

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

Cancel Assign Notary

**Documents (16)**

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

**DOWN TO CLOSING**

HOURS MINUTES SECONDS

2023 (Wed) Time: 12:00am PDT

Ready to Close

Assign Notary

Status eSign

Not Started Open Signing Room

Ready to Sign Open Signing Room

Preview Mode ON

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



## Assign a Notary

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

**DocMagic eClose Console (Settlement Agent)** Sally ▾

**Assign / Notify Notary**

**\*Notary Provider**  
NotaryCam

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

**Signers**

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

**Request Summary**

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

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

Cancel **Assign Notary**

Click "Assign Notary" when done.



## Assign a Notary

Hit Ready to Close when it's time to alert the NotaryCam Notary. To resend a notification, hit Ready to Close again, and *not* Notify.

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

- LOAN**: Displays Loan # 777-1616630796081, Primary Borrower Erica Sample, Type EClosing, Package ID 333727, and Worksheet # 1616630796081 (Version: 1).
- LENDER**: Displays Company DSI TEST LENDER (SALES), Contact Michael Morford, Email mikem@docmagic.com, and Phone (800) 649-1362.
- COUNTDOWN TO CLOSING**: Features a timer with fields for Days, Hours, Minutes, and Seconds. Below the timer, it shows 'Date: Apr 19, 2023 (Wed) Time: 12:00am PDT' and an 'Edit' link. A blue arrow points from the text box above to the 'Ready to Close' button in this section.
- Signers (2)**: A table listing two signers: Erica Sample (Borrower) and Sally Settlement (Settlement Agent). The table includes columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. The 'Ready to Close' button is highlighted in the 'eSign' column for Sally Settlement.
- Documents (16)**: A table listing 16 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. The table includes columns for #, eSign Enabled, Page(s), Signer(s), and Completed.

**Note:** NotaryCam is currently only able to process the loan once per package. Please ensure that all documents to be included in the signing ceremony are prepared and uploaded prior to selecting "Ready to Close".



# 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

☐ RON Capable **Search**

**Signers** **Notaries**

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

**Request Summary**

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

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

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

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



# Assign a Notary

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

**Assign / Notify Notary**

**\*Notary Provider**  
DocMagic RON

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

**Search**

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

☒ RON Capable **Search**

**Signers** **Notaries**

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

**Request Summary**

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

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

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

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



# Assign a Notary

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

**Assign / Notify Notary**

**\*Notary Provider**  
DocMagic RON

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

**Search**

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

☒ RON Capable **Search**

**Signers** **Notaries**

	Notary Name / Email	First Name	Last Name	Client ID
<input type="radio"/>	DOCAGIC NOTARY emily@docmagic.com	emily	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

**Request Summary**

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

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

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

Click "Request Notary Services" when done.



# Ready to Close

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

**DocMagic eClose Console (Settlement Agent)** Sally ▾

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

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

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

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

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

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	<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 (16)** [PDF](#) [Edit](#) [Print](#) [Share](#) [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: (800) 463-9056

**COUNTDOWN TO CLOSING**  
DAYS: - HOURS: - MINUTES: - SECONDS: -  
Date: Jan 9, 2024 (Tue) Time: 10:00am PST [Edit](#)

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

**Signers (5)** Tiffany Roberts Accepted: 1/9/2024 - 10:08am [Notify](#)

#	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	<a href="#">Open Signing Room</a>
2	Byron Settlement struitt@docmagic.com	Settlement Agent					Ready to Sign	<a href="#">Open Signing Room</a>
3	Steve Truitt struitt221@gmail.com	Witness	Tiffany Roberts enotaryoftexas@gmail.com	DocMagic RON 1/9/2024 - 10:00am			Not Started	<a href="#">Open Signing Room</a>
4	Youssef Aissa Ydog@docmagic.com	Witness					Ready to Sign	<a href="#">Open Signing Room</a>
5	Scott Seller scott@seller.com	Seller					Ready to Sign	<a href="#">Open Signing Room</a>

**Documents (25)** [Add](#) [Edit](#) [Delete](#) [Share](#) Preview Mode ☐ OFF

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





# Switching Notaries

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

**DocMagic eClose Console (Settlement Agent)**

**LOAN** Loan #: 777122120230  
Primary Borrower: Stephen Truitt  
Type: eClosing  
Package ID: 101462815  
Worksheet #: 1138 (Version: 1)

**Assign / Notify Notary**

**\*Notary Provider**  
DocMagic RON

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

**Signers**

#	Signer Name / Email	Role
1	Stephen Truitt struitt@docmagic.com	Borrower
2	Byron Settlement struitt@docmagic.com	Settlement Agent
3	Steve Truitt struitt221@gmail.com	Witness
4	Youssef Aissa Ydog@docmagic.com	Witness
5	Scott Seller scott@seller.com	Seller

**Notaries**

Company Name	First Name	Last Name	Client ID

City: County: State: MD Zip: ☒ RON Capable **Search**

**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

**Documents (25)**

#	eSign Enabled
1	Freeze/Close Letter
2	Multistate Fixed Rate Electronic Note
3	Uniform Residential Loan Application

**DOWN TO CLOSING**

2024 (Tue) Time: 10:00am PST

**Start eClosing**

**Notify**

**Status**

Status	eSign
Finished	Open Signing Room
Ready to Sign	Open Signing Room
Not Started	Open Signing Room
Ready to Sign	Open Signing Room
Ready to Sign	Open Signing Room

**Signer(s)**

Signer(s)	Completed
1	✓
1	✓
2	✓



# Switching Notaries

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

The screenshot shows the DocMagic eClose Console interface. A modal titled "Assign / Notify Notary" is open. The modal contains a "Notary Provider" dropdown set to "DocMagic RON" and a "Notary Type" section with radio buttons for "In Person" and "Remote Online Notary (RON)". Below this is a search form with fields for Company Name, First Name, Last Name, Client ID, City, County, State (set to NJ), and Zip. A "Search" button is next to the fields. Below the search form is a table of notaries. The second notary, "DOCAGIC NOTARY struitt@docmagic.com", is selected and highlighted with a green box. Below the table is a "Request Summary" section showing "2 participants for a RON eClosing for a property in Indianapolis, MD." and fields for "Estimate Closing Date" (1/9/2024), "Time" (10:00 AM), and "America/Los Angeles". At the bottom of the modal are "Cancel" and "Request Notary Services" buttons. A blue arrow points from the text box above to the "Request Notary Services" button. The background shows the main console with a list of signers and documents.

Signers (5)		
#	Signer Name / Email	Role
1	Stephen Truitt struitt@docmagic.com	Borrower
2	Byron Settlement struitt@docmagic.com	Settlement Agent
3	Steve Truitt struitt221@gmail.com	Witness
4	Youssef Aissa Ydog@docmagic.com	Witness
5	Scott Seller scott@seller.com	Seller

Documents (25)	
#	eSign Enabled
1	Freeze/Close Letter
2	Multistate Fixed Rate Electronic Note
3	Uniform Residential Loan Application

Notaries					
<input type="radio"/>	DOCAGIC NOTARY ssamah@docmagic.com	ssamah@docmagi...	Yes	Yes	
<input checked="" type="radio"/>	DOCAGIC NOTARY struitt@docmagic.com	struitt@docmagi...	Yes	Yes	
<input type="radio"/>	DOCAGIC NOTARY ward@docmagic.com	ward@docmagic.c...	Yes	Yes	
<input type="radio"/>	DOCAGIC NOTARY youssef@docmagic.com	youssef@docmagi...	Yes	Yes	
<input type="radio"/>	DOCAGIC NOTARY yportnaya@docma...	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. A modal dialog box titled "Confirm Notary Assignment" is centered on the screen, asking the user to confirm replacing Tiffany Roberts as the notary. The dialog has "Cancel" and "Continue" buttons. 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.

**DocMagic eClose Console (Settlement Agent)**

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

**LENDER**  
Company: DSI TEST LENDER (SALES)  
Contact: Stephen Truitt  
Email: struitt@docmagic.com  
Phone: (310) 463-9056

**COUNTDOWN TO CLOSING**  
Date: Jun 9, 2024 (Tue) Time: 10:00am PST

**Signers (5)**

#	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

**Documents (25)**

#	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 [Edit](#)

[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	<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 (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

**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	✉️ ⚙️	📄 ⚙️	🟢 Finished	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				🟢 Ready to	Open Signing Room

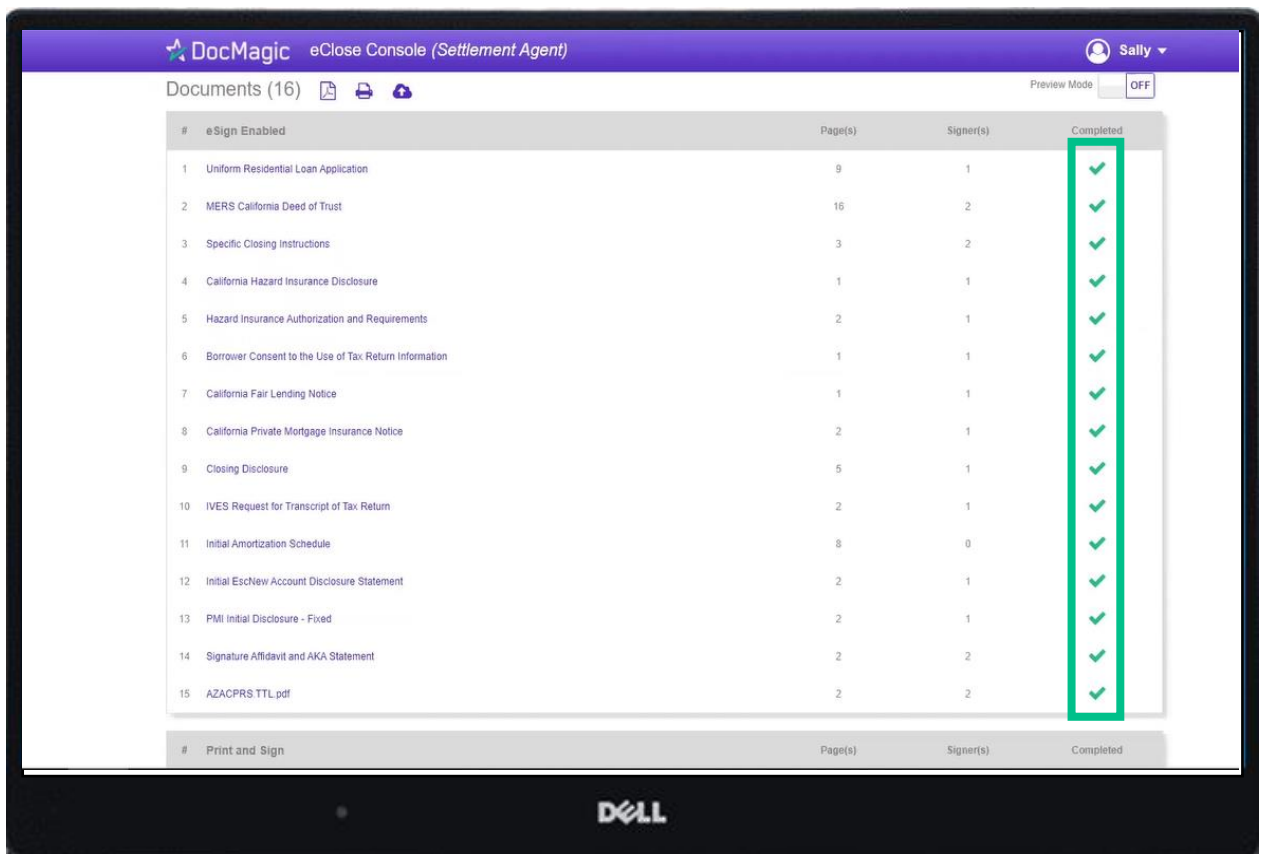
**Documents (16)**

#	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	✓



# eClose Console Confirmation

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



DocMagic eClose Console (Settlement Agent) Sally

Documents (16) Preview Mode OFF

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

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

