DocMagic

Settlement Agent eClose Console with AutoPrep

GUIDEBOOK

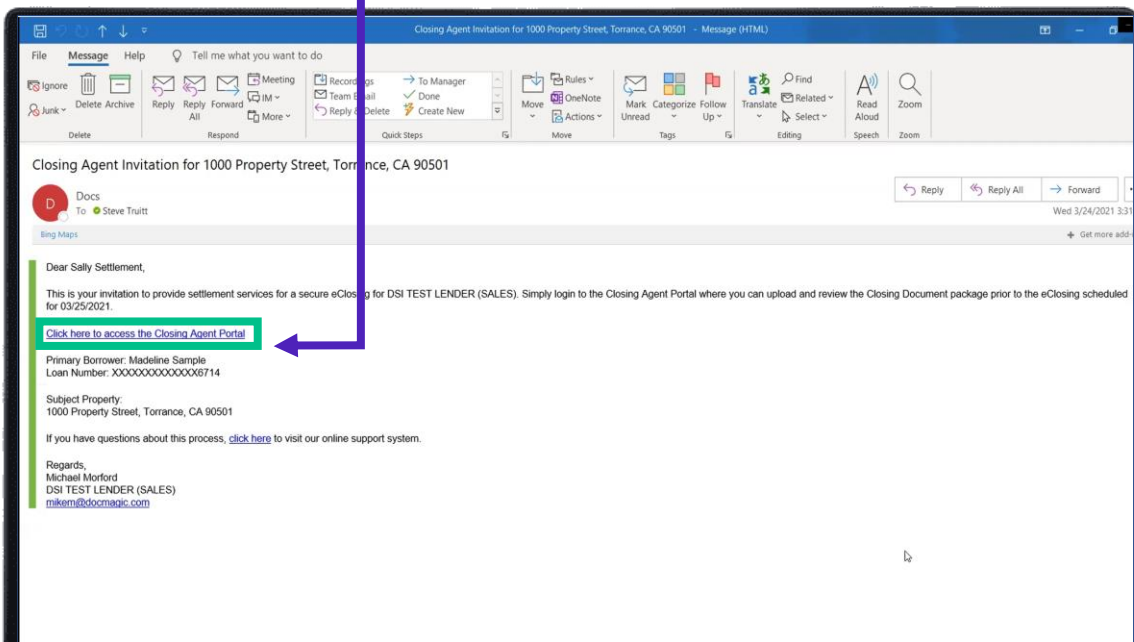# Table of Contents

# 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.

Closing Agent Invitation for 1000 Property Street, Torrance, CA 90501

Dear Sally Settlement,

This is your invitation to provide settlement services for a secure eClosing for DSI TEST LENDER (SALES). Simply login to the Closing Agent Portal where you can upload and review the Closing Document package prior to the eClosing scheduled for 03/25/2021.

Click here to access the Closing Agent Portal

Primary Borrower: Madeline Sample
Loan Number: XXXXXXXXXXXXX6714

Subject Property:
1000 Property Street, Torrance, CA 90501

If you have questions about this process, click here to visit our online support system.

Regards,
Michael Morford
DSI TEST LENDER (SALES)
mikem@docmagic.com

Agent Login

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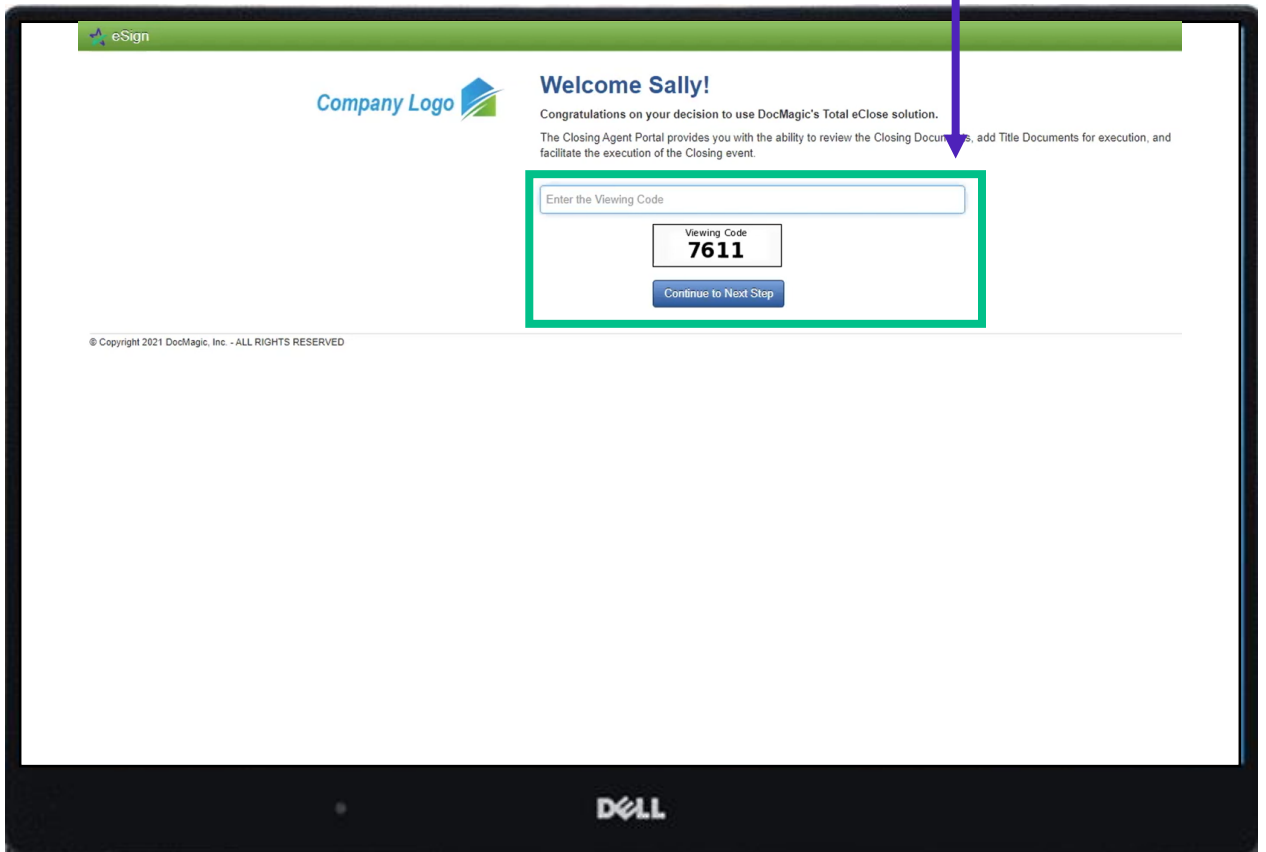
eClose Console

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.

Countdown Clock

The eClosing Countdown Clock keeps you on track right up to the moment of closing.

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.

Signer's Tab

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

DocMagic eClose Console (Settlement Agent)

Sally ▾

LOAN		LENDER		COUNTDOWN TO CLOSING

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: 0 HOURS: 6 MINUTES: 51 SECONDS: 26
Date: Mar 25, 2021 (Thu)   Time: 12:00am PDT

Details   eJournal   Action Log   Ready to Close

Signers (2)   Assign Notary

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

Documents (15)   Preview Mode 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

Signer's Details

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

Adding Participants

Click on the Silhouette Icon to add a participant.

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

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.

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.

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.

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

Preview Mode stays on until Midnight Hawaii time of the closing date.

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.

Documents Section

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

Documents Section

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

DocMagic eClose Console *(Settlement Agent)*   Sally ▼

#		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

17

Adding Documents

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

Adding Documents

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

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

Your document is ready to be reviewed

2020030016 test.pdf
660 KB · 108 pages

✓ Assigned signatures		30
Notary Fields		11
⚠ Requires Validation		9

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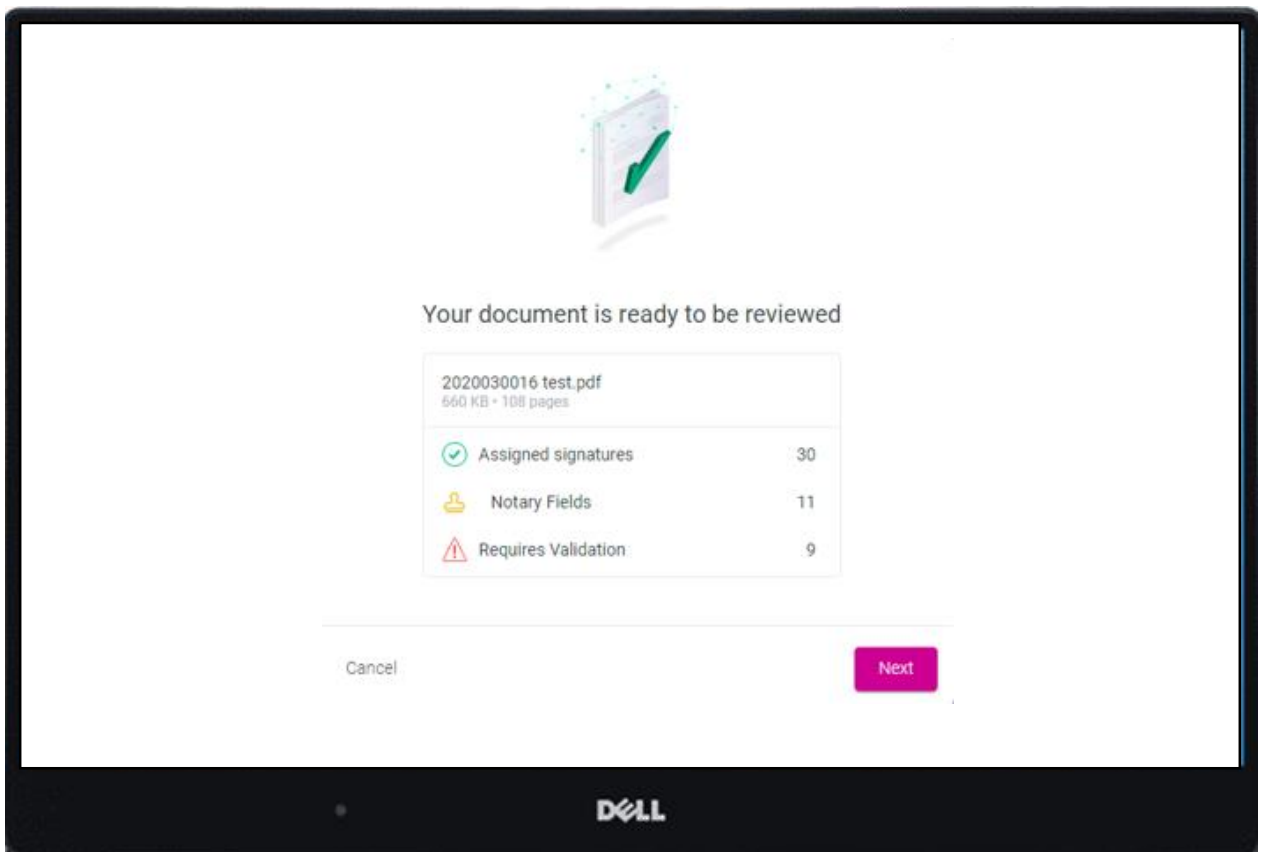
AutoPrep uses A.I. and machine learning to prepare documents for signature.

Creating Signing Boxes via AutoPrep

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

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.

The borrower will be highlighted in green

DocMagic

2020030016 test.pdf

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

DATED this 24th day of April, 2020.

Terry M Mackey (Borrower 1)

- BORROWER - Terry M Mackey - DATE -

State of _____

County of _____

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

Notary

Notary Public

My Commission Expires: _____

+

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

A user can fill out blank fields by clicking the plus

The user is responsible for verifying the correct signer and fields

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

Done

Signature

Notary Signing Date

Notary Seal

RON Text

Notary Text

Closing county

Closing state

Participant Signer

Participant Signer Date

You're all done!

Thank you for using AutoPrep. Your documents
have been successfully e-enabled.

You can now safely close this tab.
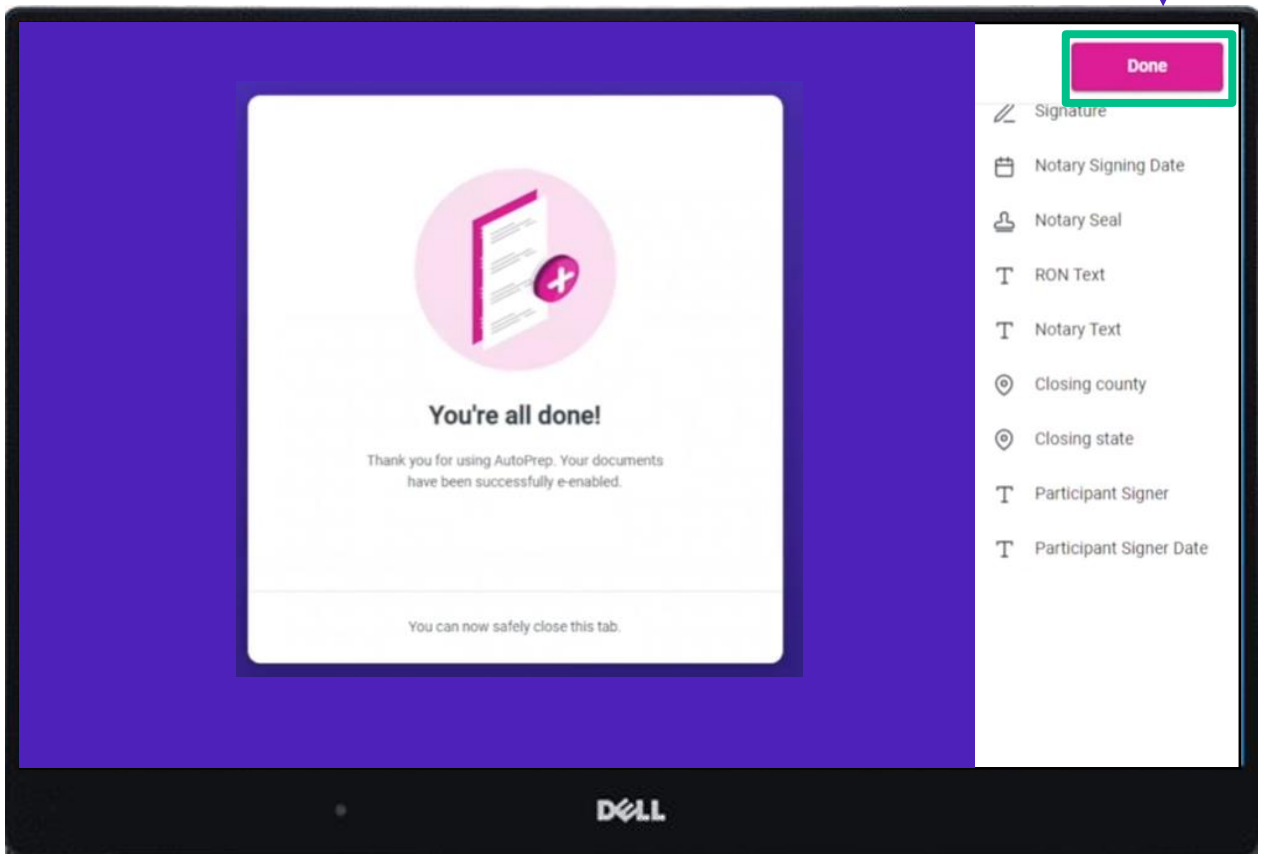
After clicking Done, you will be returned to the Settlement Agent portal.

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

Edit AutoPrep Documents

To edit an existing document using AutoPrep, select a document then click on the pencil.

Edit AutoPrep Documents

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

Edit AutoPrep Documents

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

eJournal

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

Click on this tab to access the eJournal.

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		LENDER		COUNTDOWN TO CLOSING	

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
0	6	42	12

Date: Mar 25, 2021 (Thu)   Time: 12:00am PDT

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

DELL

You may also add notes at the bottom.

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

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

Upload signed and scanned documents here.

DocMagic eClose Console *(Settlement Agent)*

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

Details   eJournal   Action Log

Signers (2)

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

Documents (15)

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

— IMPORTANT —

YOU <u>MUST</u> 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 1-866-620-1583

Loan 777435612

Pages 25

From STEVE SAMPLE

75605744~1

DELL

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

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

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

#		Page(s)	Signer(s)	
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

Click this button to start the process of assigning a notary.

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

Assign a Notary

For a Hybrid 3 or Total eClose, select Remote Online Notary for Notary Type.

Assign a Notary

If you select *NotaryCam* as your Notary Provider, you will only need to set the closing date and time.

Assign / Notify Notary

*Required

*Notary Provider

NotaryCam

*Notary Type
- ○ In Person
- ● Remote Online Notary

Signers

Name	Email	Role	Phone
Erica Sample	erica.sample@exam...	Borrower	Home: (800) 649-1362

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**

DocMagic   eClose Console *(Settlement Agent)*   Sally ▾

LOAN
Primary

Details

Signers (2)

#	Signer Name / Ema	Status	eSign
1	Erica Sample erica.sample@exam	● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@ex	● Ready to Sign	Open Signing Room

Documents (16

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

TO CLOSING
HOURS 6   MINUTES 41   SECONDS 17
Time: 12:00am PDT

Ready to Close

Assign Notary

Preview Mode ON

DELL

Click "Assign Notary" when done.

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

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

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

Assign / Notify Notary

*Required

*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

○	DOCMAGIC NOTARY emily@docmagic.com	emily@docmagic....	Yes	Yes
○	DOCMAGIC NOTARY eugener@docmagic.com	eugener@docmag...	Yes	Yes
●	DOCMAGIC NOTARY struitt@docmagic.com	struitt@docmagic....	Yes	Yes
○	DOCMAGIC NOTARY alexh@docmagic.com	alexh@docmagic....	Yes	Yes
○	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**

DocMagic eClose

LOAN
Loan #: 777-1
Primary Borrower: Erica
Type: EClo
Package ID: 3337
Worksheet #: 1616

▣ Details   ▤ eJou

Signers (2) ☌

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

Documents (16) ▤ ✎

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

◉ Sally ▾

SING

MINUTES	SECONDS
41	17

Time: 12:00am PDT

Ready to Close

Assign Notary

Status	eSign
ot Started	Open Signing Room
eady to Sign	Open Signing Room

Preview Mode ON

	Completed
	✓
	✓
	✓
	✓
	✓
	✓

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

*Required

*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**

○	DOCMAGIC NOTARY emily@docmagic.com	emily@docmagic....	Yes	Yes
○	DOCMAGIC NOTARY eugener@docmagic.com	eugener@docmag...	Yes	Yes
●	DOCMAGIC NOTARY struitt@docmagic.com	struitt@docmagic....	Yes	Yes
○	DOCMAGIC NOTARY alexh@docmagic.com	alexh@docmagic....	Yes	Yes
○	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**

Click "Request Notary Services" when done.

DocMagic   eClose

LOAN
Loan #: 777-1
Primary Borrower: Erica
Type: EClo
Package ID: 3337
Worksheet #: 1616

Details   eJou

Signers (2)

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

Documents (16)

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

Sally ▾

SING

MINUTES	SECONDS
41	17

Time: 12:00am PDT

Ready to Close

Assign Notary

Status	eSign
ot Started	Open Signing Room
eady to Sign	Open Signing Room

Preview Mode   ON

Completed

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		LENDER	
Loan #:	777-1616630796081	Company:	DSI TEST LENDER (SALES)
Primary Borrower:	Erica Sample	Contact:	Michael Morford
Type:	EClosing	Email:	mikem@docmagic.com
Package ID:	333727	Phone:	(800) 649-1362
Worksheet #:	1616630796081 (Version: 1)		

COUNTDOWN TO CLOSING

DAYS	HOURS	MINUTES	SECONDS
0	6	41	17

Date: Mar 25, 2021 (Thu)   Time: 12:00am PDT

▦ Details   ▤ eJournal   ↻ Action Log

Ready to Close

Signers (2) 👤+

NotaryCam   Notify

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

Documents (16) 📄 ✏ 🖹 🖨 ☁

Preview Mode 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

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

Preview Mode Off

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

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

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.