

## Settlement Agent

Helpful Tips

### **#1**: Don't Confuse These Buttons!

The E Closing Package 2: 33727 Workshee 7: 1616630796081 (Version: 1)       Image: Contact: Michael Morford Email: mikem@docmagic.com Phone: (000) 649-1362       Image: Contact: Michael Morfor	E Erica Sample E Consing E Saturnal Company: DSI TEST LENDER (SALES) Contact: Michael Morford E mait: mixem@docmapic.com Phone: (800) 649-1362 Dete: Mar 25, 2021 (Thu) Dete: Mar 25, 2021 (Thu) E Ready to Close Company: DSI TEST LENDER (SALES) Date: Mar 25, 2021 (Thu) E Status E Company: DSI TEST LENDER (SALES) Date: Mar 25, 2021 (Thu) E Status E Company: DSI TEST LENDER (SALES) Date: Mar 25, 2021 (Thu) E Status E Company: DSI TEST LENDER (SALES) Date: Mar 25, 2021 (Thu) E Status E Company: DSI TEST LENDER (SALES) D STAtus E Company: DSI TEST LENDER (SALES) E Co
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1 Uniform Residential Loan Application 9 1 🗸	
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3 Specific Closing Instructions 3 2	3 2 🗸
4 California Hazard Insurance Disclosure 1 1 1	
5 Hazard Insurance Authorization and Requirements 2 1	sclosure 1 1 🗸 🗸
-6 Borrower Consent to the Use of Tax Return Information 1 1 1	
	n and Requirements 2 1 🗸

Click here to 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.



### **#1**: Don't Confuse These Buttons!

The leftmost icon allows you to upload **new** documents to the package. When clicked, a window will appear where you can upload files from your computer.

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🚑 Details 📳	eJournal O Action Log				📸 Ready to Close
Signers (2)					Assign Notary
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1 Uniform Residential Loan App			ĝ	1	~
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#### **#1**: Don't Confuse These Buttons!

The rightmost icon allows you to upload documents that have been ink signed. IMPORTANT -Close Console (Set ement Agent) YOU MUST USE THIS AS YOUR COVER SHEET. DO NOT WRITE ON THIS FORM. LOAN Loan #: 777-1616630796081 LENDER Primary Borrower: Erica Sample Messages or notes written on this form are discarded and will not be read. Type: EClosing Package ID: 333727 Worksheet #: 1616630796081 (Versi INSTRUCTIONS Details eJournal 5 Action Log 1. Print this document (F) is on a mobile device, use "share" options to either print it from your device or email it to yourself then print it from Signers (2) 2. Carefully review and sign each document # Signer Name / Email Role Notary Name Erica Sample Notary\_name\_placehold NOTARY\_EMAIL\_PLAC 3. Return the document Borrower C. erica.sample@example.c.. a) From the LoanMagic App Sally Settlement Go
 Navigate to the document that requires an ink signat
 Press the "Scan" button and follow the onscreen insi 2 Settlement Agent sally settlement@exampl - or b) From the eSign website - Scan signed documents to PDF file. - Use Upload link within eSign session and follow on-screen promp Documents (15) 🚦 🖋 🗋 🔒 - or c) Using a fax machine - FAX to 1-866-620-1583 # eSign Enabled 1 Uniform Residential Loan Application Loan 777435612 2 MERS California Deed of Trust Pages 25 From STEVE SAMPLE 3 Specific Closing Instructions 4 California Hazard Insurance Disclosure Hazard Insurance Authorization and Requirements 6 Borrower Consent to the Use of Tax Return Information DELL

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



### **#2**: Fix Incorrectly Tagged Docs While Signing!

If you find an improperly tagged document during the signing experience, you may go back to the Settlement Agent Portal and fix it.

	Olasian Desurgente	JS JOHN SMITH Customer
	Closing Documents	-
Borrower'	's Certification, Authorization and Consent	Start signing
BORROWER	CONSENT TO THE USE OF TAX RETURN INFORMATION	*
I understand, acknowledge, and information for purposes of:	agree that the Lender and Other Loan Participants can obtain, use and share tax return	•
	ning, managing, monitoring, servicing, selling, insuring, and securitizing a loan; or ted by applicable laws, including state and federal privacy and data security laws.; or	Ē
The Lender includes the Lender and assigns.	r's affiliates, agents, service providers and any of aforementioned parties' successors	20
or acquirers of any beneficial o	cludes any actual or potential owners of a loan resulting from your loan application, r other interest in the loan, any mortgage insurer, guarantor, any servicers or service any of aforementioned parties' successors and assigns.	ſ
	• D¢LL	
Int	his example, there's a missing signa: field for the borrower to sign.	ature

## **#2**: Fix Incorrectly Tagged Docs While Signing!

From the settlement agent portal, click on the pencil icon and fix incorrectly tagged documents.

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Details	eJou nal 🔊	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	<b>⊡</b> † 0	O	Not Started	Open Signing Room
2 Sally Settlement sally.settlement@exampl	Settlement Agent	Unassigned				Ready to Sign	Open Signing Room
# eSign Enabled	liantian			Page		igner(s)	Completed
1 Uniform Residential Loan App	plication		_	Page 9		1	Completed
	plication		-			1	~
1 Uniform Residential Loan App California Deed of Trust (MERS) Prepare documents for signing.	BORROWER CO	NISENT TO THE USE OF TAX RETURN			55	1	~
1 Uniform Residential Loan App California Deed of Trust (MERS) Prepare documents for signing.	BORROWER CO I understand, acknowledge, and ag information for purposes of (0), workfore an offer	gree that the Lender and Other Loan Participants can	a obtain, use and share tax return		Signature & Initials & Signature & Initials & Signature	1	~
Uniform Residential Loan App     California Deed of Trust (MERS)     Prepare documents for signing.     E     E	BORROWER CO Isuderstand, acknowledge, and ag information for purposes of operating materials (i) providing an affer; (ii) an otherwas permitted (iv) materiag	gree that the Lender and Other Lean Participants car ig, managing, monitoring, servicing, selling, insu by applicable laws, including state and federal pri	a obtain, use and share tax return ring, and securitizing a loan; or reacy and data security laws.; or		डक टुर्ड eTags & Signature & Initials	1	~
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Uniform Residential Loan App     California Deed of Trust (MERS)     Prepare documents for signing.     E	BORROWER CO Instrument, schwedog, and y instrument on properso of () provideg as offer; () errording materian () as otherwas permit () materiang The Lenden includes the Lender's and assign	gree that the Lender and Other Lean Participants car ig, managing, monitoring, servicing, selling, insu by applicable laws, including state and federal pri	sobtain, use and share tax return ring, and securitizing a loan; or reacy and data security laws; or emmetioned parties' successors		St eTags St. Signature & Initials S Signature & Initials Minitals T PossFill	1	~ ~ ~ ~
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#### #2: Fix Incorrectly Tagged Docs While Signing!

After you've made the tagging correction, go back to your signing experience. Click your name in the top right, then Restart Meeting.

Waiting for JOHN SMITH to start signing...

#### BORROWER'S CERTIFICATION, AUTHORIZATION AND CONSENT

Loan Number: 777030720220005

Date: March 7, 2023

Provided By: DSI TEST LENDER (SALES)

Borrower: JOHN SMITH

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

#### CERTIFICATION

The undersigned certify the following:

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

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

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





DocMagic Notary Notary

23

Restart Meeting

Change Email Address

Withdraw Consent

Terms of Use

Save & Exit

JOHN SMITH
 Signing

## **#2**: Fix Incorrectly Tagged Docs While Signing!

Your changes will show.

⊚ Cu	Cu rently watching JOHN SMITH				DocMagic Notary Notary	×
				Recording	00:00:16	
				as - 6		
						8
BORROWER CONSENT 1	D THE USE	OF TAX RETURN IN	FORMATION	DocMagic Notary	* • •	0
I understand, acknowledge, and agree that the information for purposes of:	ender and Othe	er Loan Participants can obt	tain, use and share tax return			
<ul> <li>(i) providing an offer;</li> <li>(ii) originating, maintaining, managing,</li> <li>(iii) as otherwise permitted by applical of</li> <li>(iv) marketing</li> </ul>				JOHN SMITH 2 • Signing	<b>, В</b>	
The Lender includes the Lender's affiliates, a grand assigns.	ents, service pr	roviders and any of aforem	entioned parties' successors			
The Other Loan Participants includes any act a						
or acquirers of any beneficial or other interes in providers for these parties and any of aforem re-			tor, any servicers or service			
	,					
Sign						
Borrower JOHN SMITH	Date	Borrower	Date			
		100000000				
		Déll				

