DocMagic

eClose with AutoPrep – Hybrid 2
With Settlement Agent Portal and Borrower's Experience

GUIDEBOOK

Hybrid 2 eClose

Hybrid #1

- Paper Note

- Paper Notary

- All Other Documents Electronic

Hybrid #2

- eNote

- Paper Notary

- All Other ✔ Documents Electronic

Hybrid #3

- Paper Note

- eNotary

- All Other Documents Electronic

Total eClose

- eNote

- eNotary

- All Other Documents Electronic
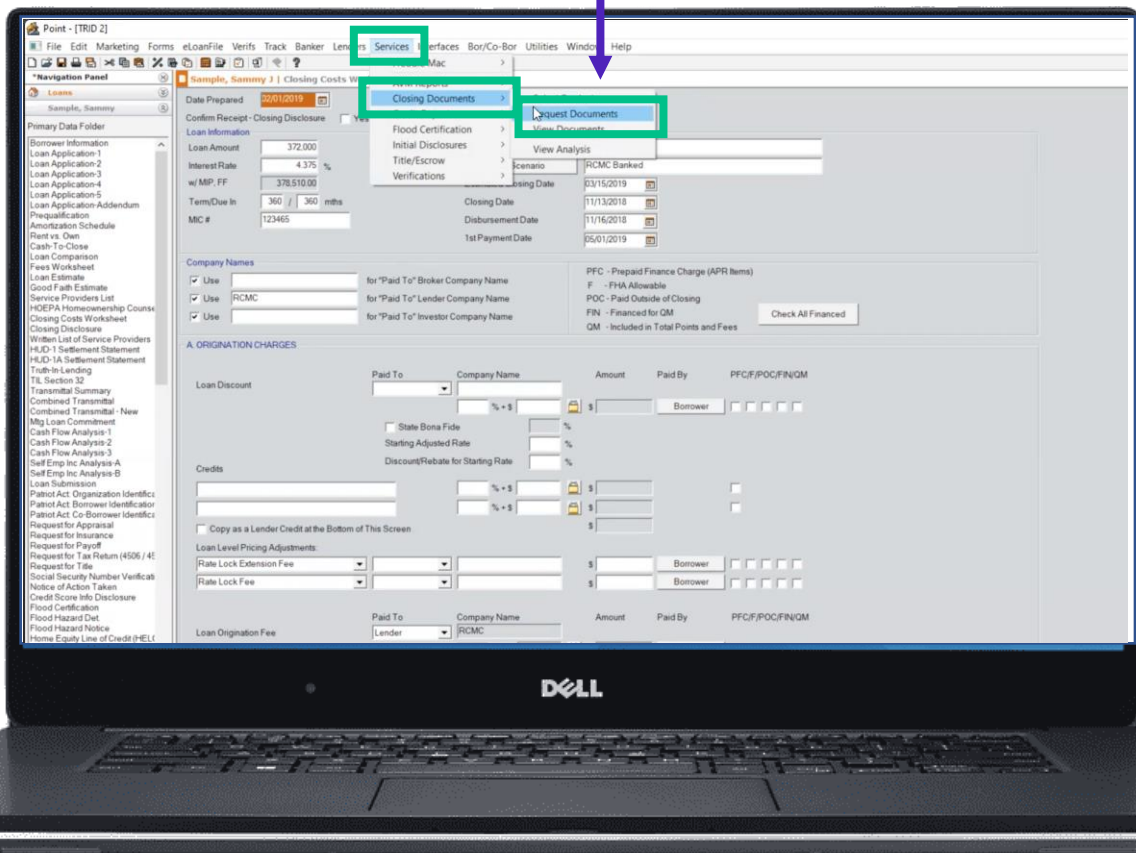
Hybrid 2 eClose Process
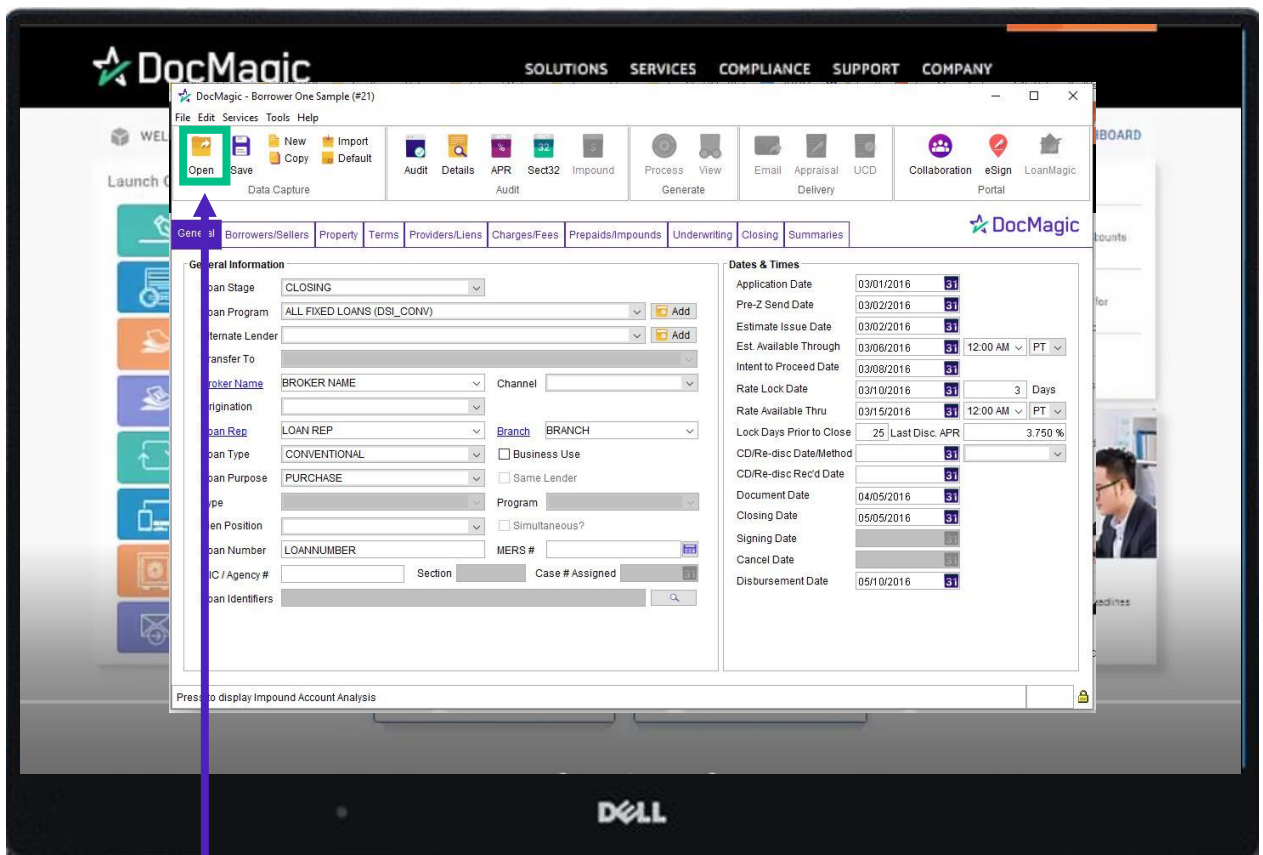
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Processing Closing Documents in LOS

Closing Documents in Your LOS

Depending on which LOS you utilize, you will need to choose Closing Documents when processing a closing package to get started with the process.

Closing Documents in Your LOS

If your LOS does not allow for eNote, you will need to re-process the document in DocMagic Online.

Start by opening the file in DMO.

Closing Documents in Your LOS

Confirm that all Loan Information has been imported into DMO and make any necessary additions and corrections.

Closing Documents in Your LOS

If using DocMagic Online, enter your loan information manually.
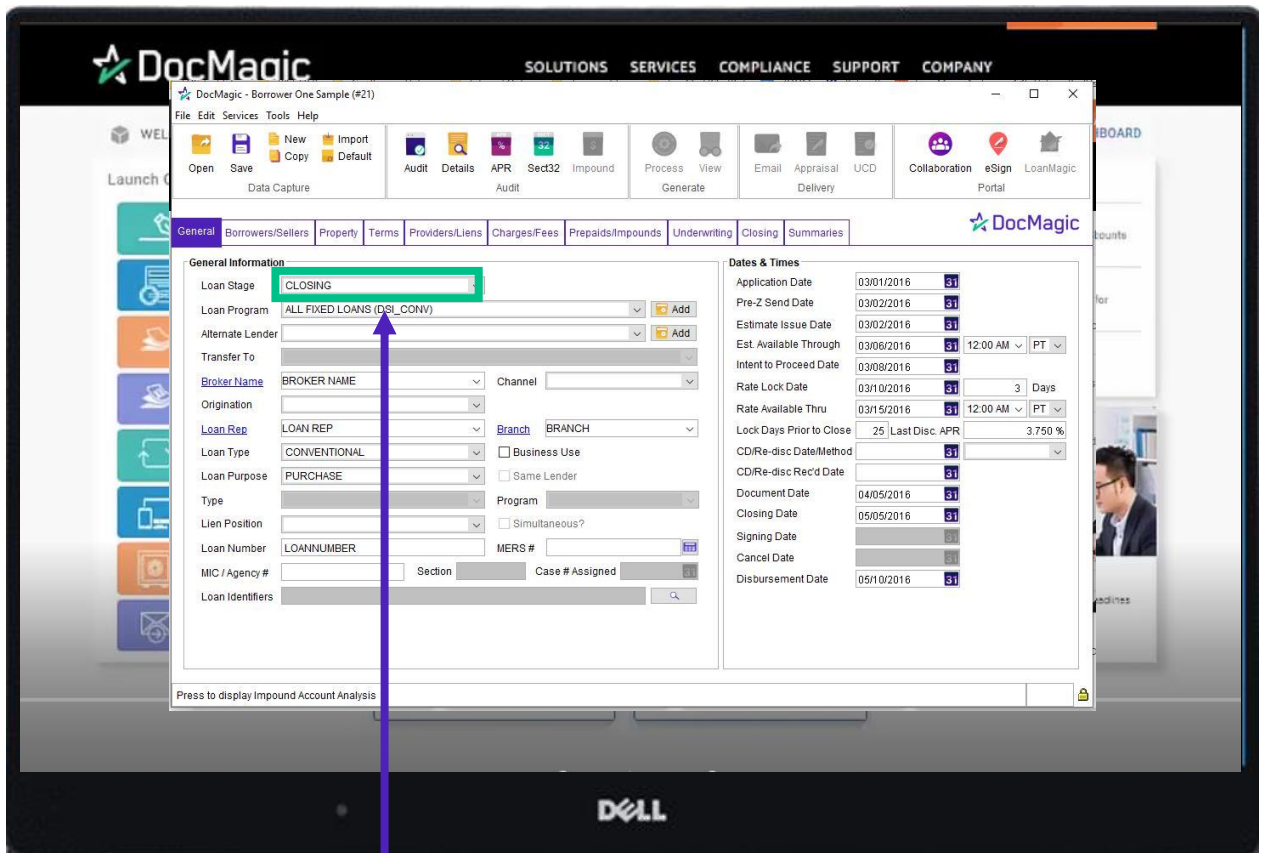
For all document sets, choose Closing from Loan Stage here.

Loan Detail Report

Recommended: Click here to see the Loan Detail Report before your process.

Process the Document set.

Choose "Closing" for Package Type.

Select these boxes for a Hybrid 2 closing.
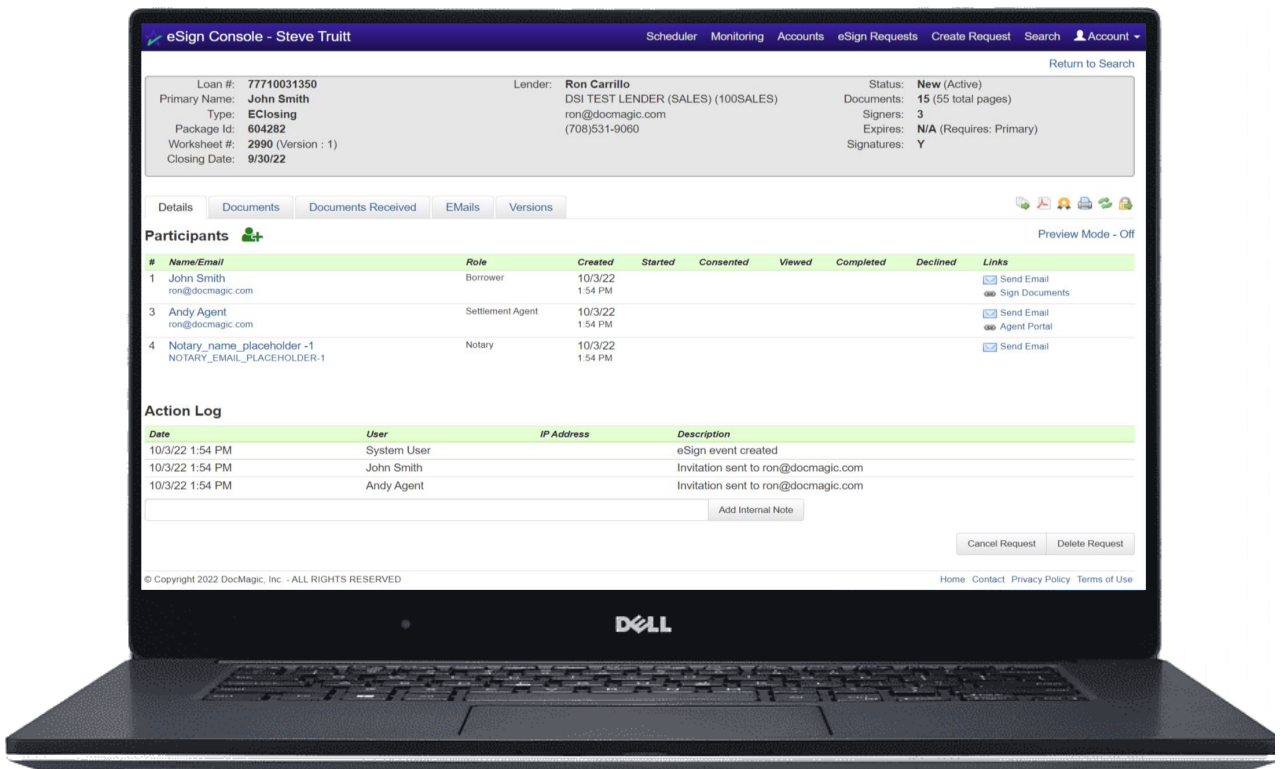
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Lender Portal

Lender Portal

Lenders can monitor the activity of the Settlement Agent and Borrower here.

For detailed instructions on how to use the eSign Console / Lender Portal, please visit our Product Training Page.

Lender Portal

Reminder emails can be sent to the Borrower and Settlement Agent here.

Documents, both click signed and ink signed, are reviewed in the Documents Tab.

eSign Console - Steve Truitt

Scheduler	Monitoring	Accounts	eSign Requests

Create Request   Search   👤 Account ▾

		Lender:	**Steve Truitt**		Status:	**New** (Active)
Loan #:	**77710031350**				Documents:	**15** (55 total pages)
Primary Name:	**John Smith**		DSI TEST LENDER (SALES) (100SALES)		Signers:	**2**
Type:	**EClosing**		struitt@docmagic.com		Expires:	**N/A** (Requires: Primary)
Package Id:	**604824**		(800)649-1362		Signatures:	**Y (Ink Sign)**
Worksheet #:	**2990** (Version : 2)					
Closing Date:	**9/30/22**					

Details	Documents	Documents Received	EMails	Versions

Documents ➕ ✏️

	Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq Document Id | Document Id	Filename	Delete	Operation
1	Borrower's Certification, Authorization and Consent	✔	2	1	1		5175538 | 5187039	bcac.msc.xml		
2	Multistate Fixed Rate Note		0/4	1	1		5175539 | 5187040	us3200.not.xml		Mark as Complete
3	New Jersey Mortgage (MERS)		0/19	1	1		5175540 | 5187041	nj3031.mzm.xml		Mark as Complete
4	Uniform Residential Loan Application	✔	7	1	1		5175541 | 5187042	urla.msc.xml		
5	Uniform Residential Loan Application - Lender Loan Information	✔	2	0	0	✔	5175542 | 5187043	urlalli.msc.xml		
6	Addendum to Closing Instructions	✔	1	1	1		5175543 | 5187044	atci3.msc.xml		
7	Specific Closing Instructions	✔	3	4	2		5175544 | 5187045	sci.msc.xml		
8	Hazard Insurance Authorization and Requirements	✔	2	1	1		5175545 | 5187046	hazard8.lsr.xml		
9	IVES Request for Transcript of Tax Return	✔	2	2	1		5175546 | 5187047	4506c.msc.xml		
10	Closing Disclosure	✔	5	1	1		5175547 | 5187048	cd.dsc.xml		
11	Customer Identification Verification	✔	2	0	0	✔	5175548 | 5187049	civ.msc.xml		
12	Initial Escrow Account Disclosure Statement	✔	2	1	1		5175549 | 5187050	ieads.msc.xml		
13	New Jersey Initial Tax Authorization Notice	✔	1	0	0	✔	5175550 | 5187051	njitan.msc.xml		
14	New Jersey Private Well Testing Act Certification	✔	1	1	1		5175551 | 5187052	njpwt.msc.xml		
15	Signature Affidavit and AKA Statement		0/2	1	1		5175552 | 5187053	saakas.msc.xml		Mark as Complete

Add Internal Note

DELL

You can check the status of the signature process here.
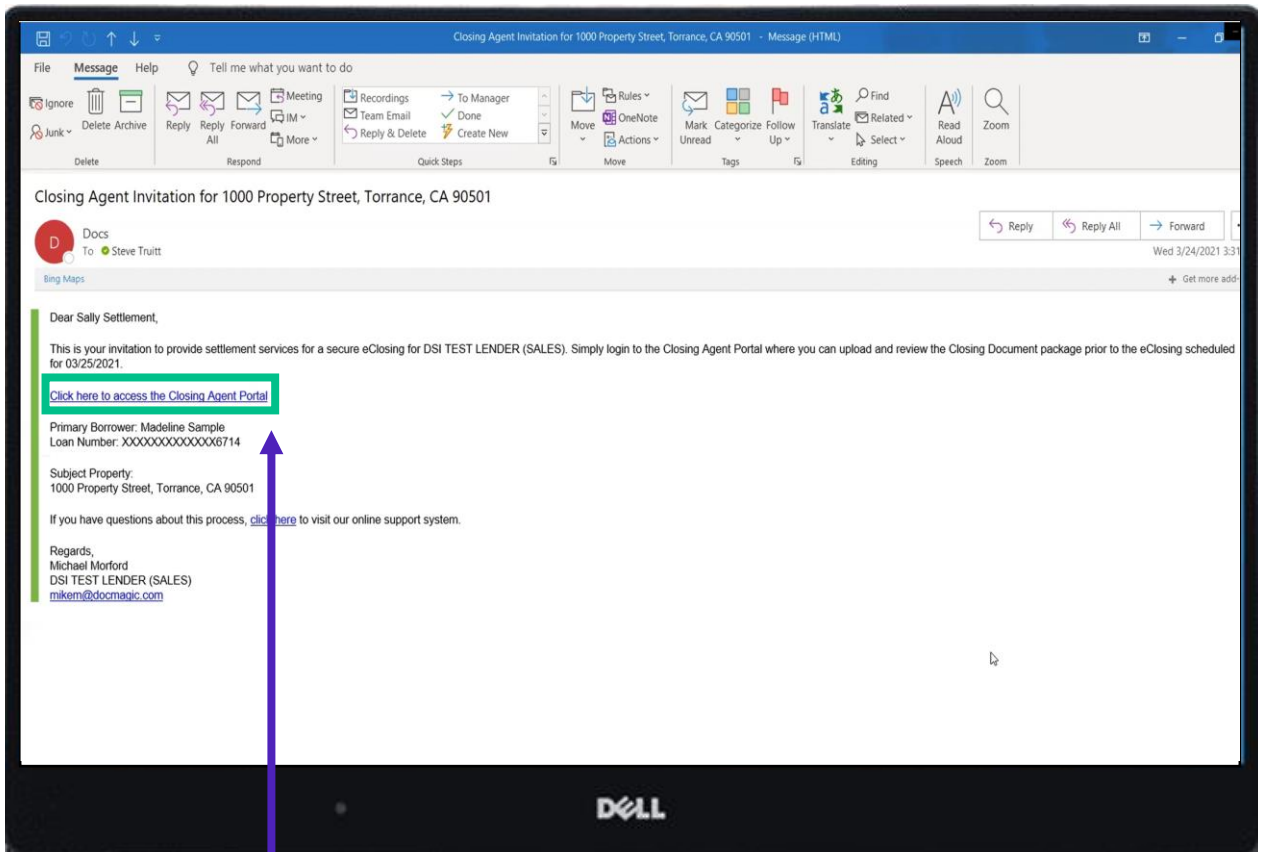
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Settlement Agent Process

Settlement Agent Invitation Email

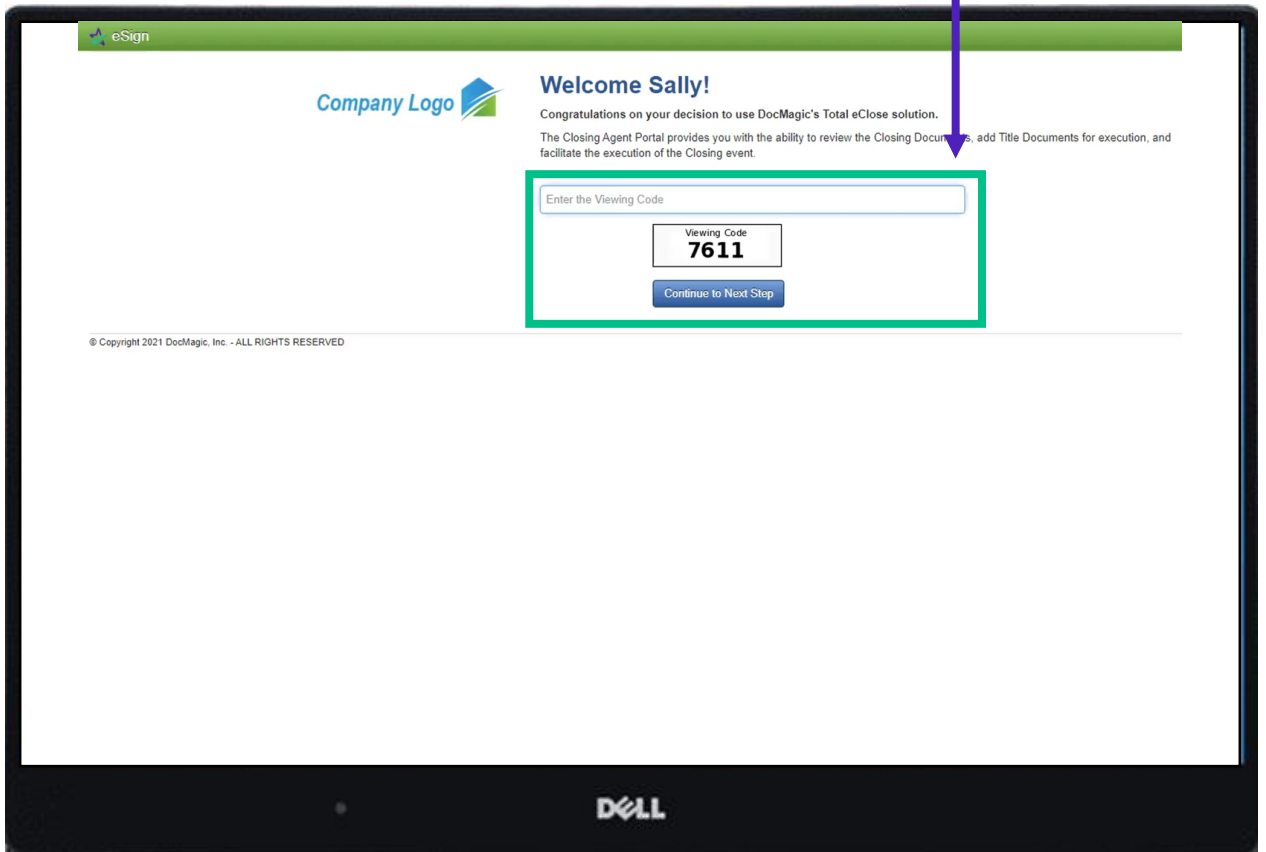The Settlement Agent will receive an invitation email when the lender creates the eClose event.

This link, along with the email is specific to this particular transaction.

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

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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DELL

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.

The Edit button at the bottom right of the Countdown Clock allows you to edit the closing time for all participants.

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.

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.

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.

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 ▾
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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D∅LL

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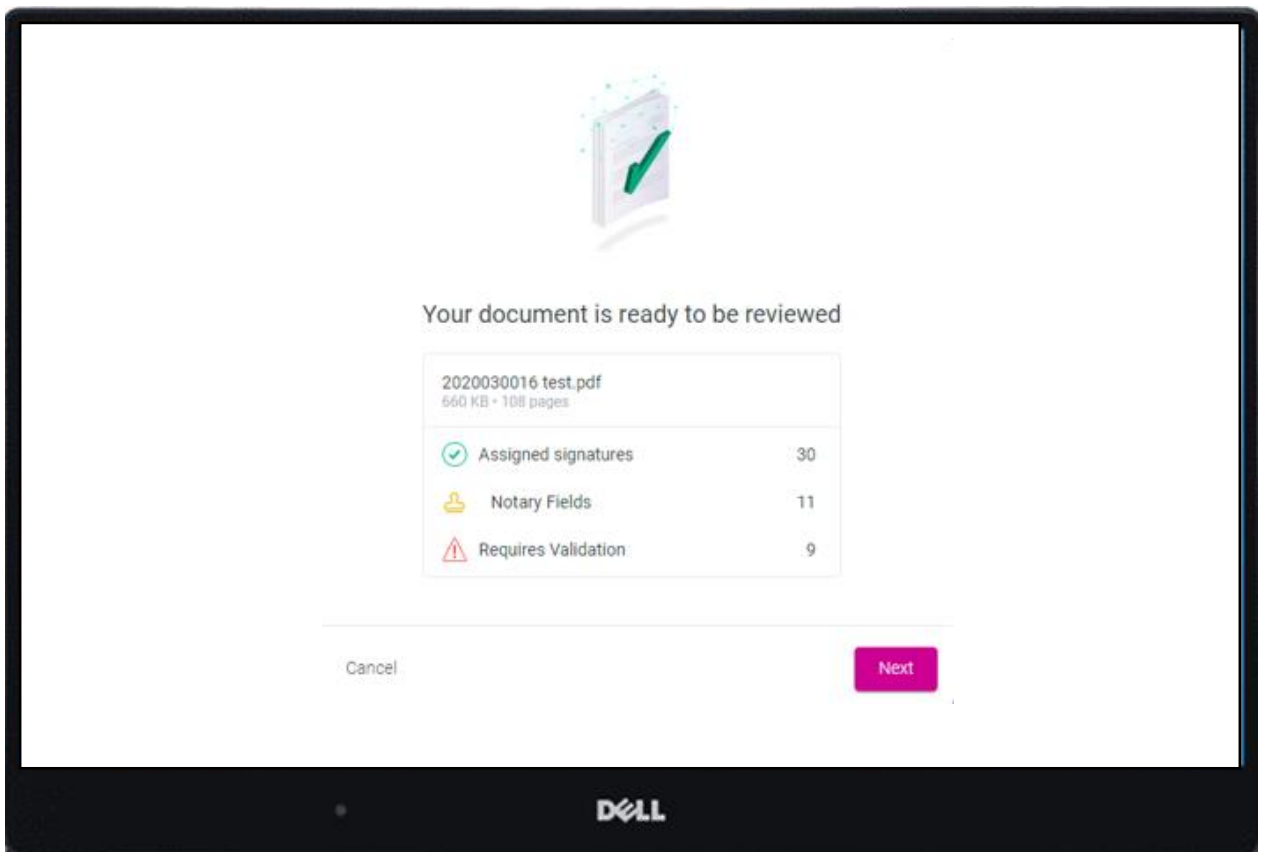
AutoPrep uses A.I. and machine learning to prepare documents for signature.

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 <u>green</u>

✰ 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: _____

+

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

> AutoPrep will always guess the borrowers when they are not clearly assigned in signature marks.

Uniform Residential Loan Application

This application is designed to be completed by the applicant(s) with the Lender's assistance. Applicants should complete this form as "Borrower" or "Co-Borrower", as applicable. Co-Borrower information must also be provided (and the appropriate box checked) when ☐ the income or assets of a person other than the Borrower (including the Borrower's spouse) will be used as a basis for loan qualification or ☐ the income or assets of the Borrower's spouse or other person who has community property rights pursuant to state law will not be used as a basis for loan qualification, but his or her liabilities must be considered because the spouse or other person has community property rights pursuant to applicable law and Borrower resides in a community property state, the security property is located in a community property state, or the Borrower is relying on other property ...ted in a community property state as a basis for repayment of the loan.

...is is an application for joint credit, Borrower and Co-Borrower each agree that we ... o apply for joint credit (sign below):

Terry M Mackey (Borrower 1) ⊗   A Married Man (Borrower 2) ⊗
Borrower   Co-Borrower

I. TYPE OF MORTGAGE AND TERMS OF LOAN						
Mortgage Applied for:	☐VA ☐FHA	☒Conventional ☐USDA/Rural Housing Service	☐Other: (explain)		Agency Case Number	Lender Case Number 2020030016
Amount $400,000.00	Interest Rate 3.250%	No. of Months 360	Amortization Type:	☒Fixed Rate ☐GPM	☐Other (explain): ☐ARM (type):	

II. PROPERTY INFORMATION AND PURPOSE OF LOAN					
Subject Property Address (street, city, state & ZIP) 1107 Chesterton Drive, Richardson, TX 75080					No. of Units 1
Legal Description of Subject Property (attach description if necessary)					Year Built 1978
Purpose of Loan	☐Purchase ☒Refinance	☐Construction ☐Construction-Permanent	☐Other (explain):	Property will be: ☒Primary Residence ☐Secondary Residence ☐Investment	

Complete this line if construction or construction-permanent loan.

Year Lot Acquired	Original Cost $	Amount Existing Liens $	(a) Present Value of Lot $	(b) Cost of Improvements $	Total (a + b) $

Complete this line if this is a refinance loan.

Year Acquired 2000	Original Cost $240,000.00	Amount Existing Liens $146,914.00	Purpose of Refinance CASH OUT OTHER	Describe Improvements ☐made ☐to be made Cost: $	
Title will be held in what Name(s)			Manner in which Title will be held	Estate will be held in:	

DELL

> Along with other fields, you must check and correct **every** field before you're done.

AutoPrep

Clicking the plus opens a toolbox on the right side. You can use these to fill in blank fields.

It is crucial that you assign fields correctly and fix wrongly identified fields every time so the system can learn from your edits.

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

)msk_16_c - john smith.
page 6 of 7

You're all done!

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

You can now safely close this tab.

Done

Signature

Notary Signing Date

Notary Seal

RON Text

Notary Text

Closing county

Closing state

Participant Signer

Participant Signer Date

Settlement Agent Portal – Post AutoPrep

After clicking Done, you will be returned to the Settlement Agent portal.

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

LOAN		LENDER		COUNTDOWN TO CLOSING
	Loan #: 777-1616630796081		Company: DSI TEST LENDER (SALES)	DAYS HOURS MINUTES SECONDS
	Primary Borrower: Erica Sample		Contact: Michael Morford	— — — —
	Type: EClosing		Email: mikem@docmagic.com	
	Package ID: 333727		Phone: (800) 649-1362	Date: Apr 19, 2023 (Wed) Time: 12:00am PDT Edit
	Worksheet #: 1616630796081 (Version: 1)			

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_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

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.*

eJournal

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

Click here to see the Action Log. This tab shows the actions that everyone involved in the process has taken, and when.

You may also add notes at the bottom.

Print Options

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

Wet-sign Options

Upload signed and scanned documents here.

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

DocMagic eClose Console *(Settlement Agent)*

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

LENDER

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

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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.

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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Once all the documents have been uploaded and prepared for execution, click on "Ready to Close".

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.

V3 Signing (Borrower's Experience)

Logging In
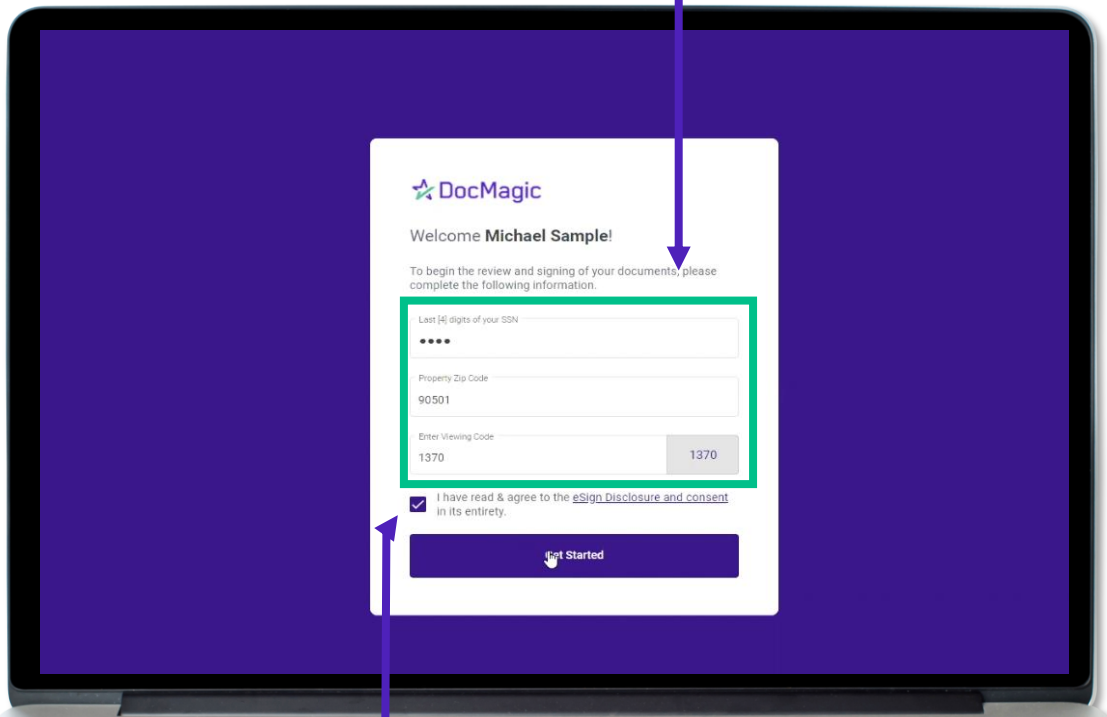
When the Settlement Agent processes the closing documents, the borrower will get an email inviting them to access the signing portal for their set of documents.
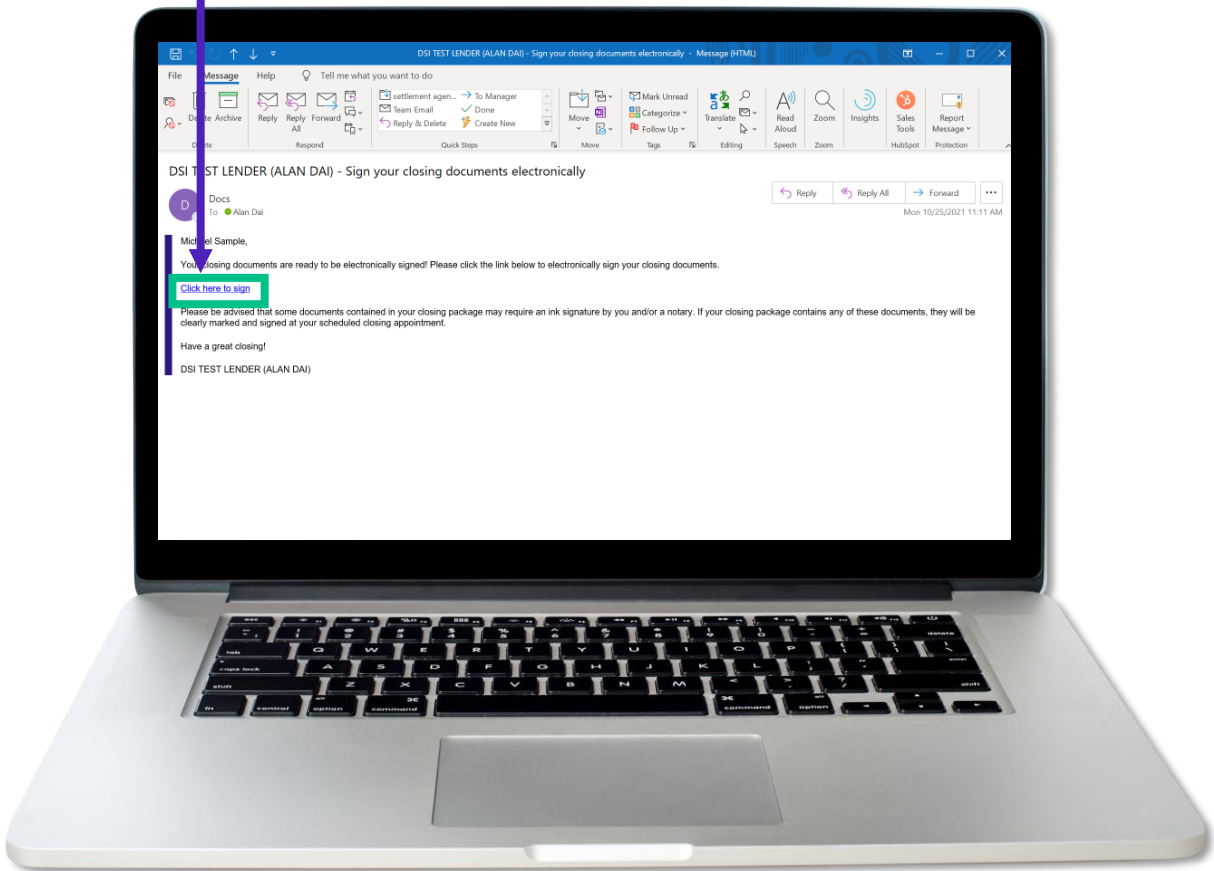
Verification boxes include SSN and viewing code. The lender may add property zip code as a third option.

DocMagic

Welcome **Michael Sample**!

To begin the review and signing of your documents, please complete the following information.

Last [4] digits of your SSN
••••

Property Zip Code
90501

Enter Viewing Code
1370   1370

☑ I have read & agree to the eSign Disclosure and consent in its entirety.

Get Started

The signer must check the eSign Disclosure and Consent box to sign on.

Don't Click Outside the Tab!

Before we get started - it's important to note that during the signing experience, all participants are encouraged to not click outside of their web browser tab as doing so may cause technical glitches like the one pictured.
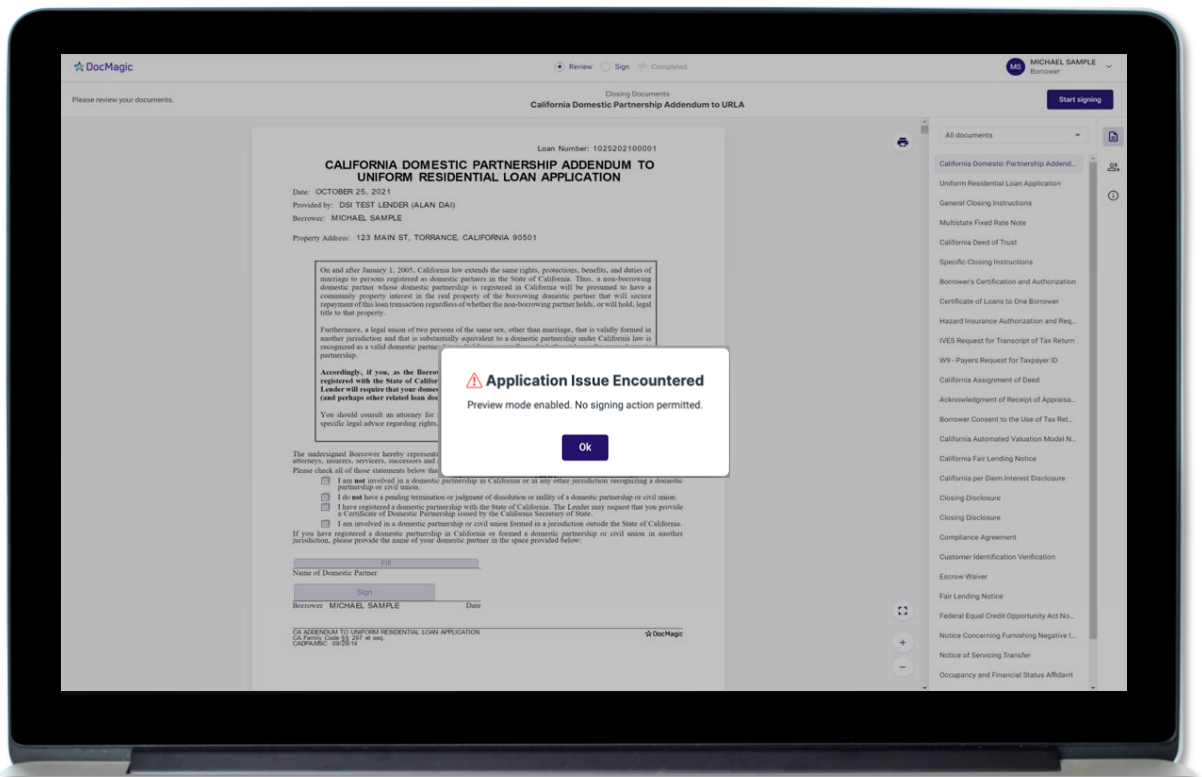
If repeated technical glitches occur, try clearing browser cache or running the experience in an incognito window.

Page Features

Along the top, you will find indicators that show progress of the Review, Ink-sign, and eSign processes
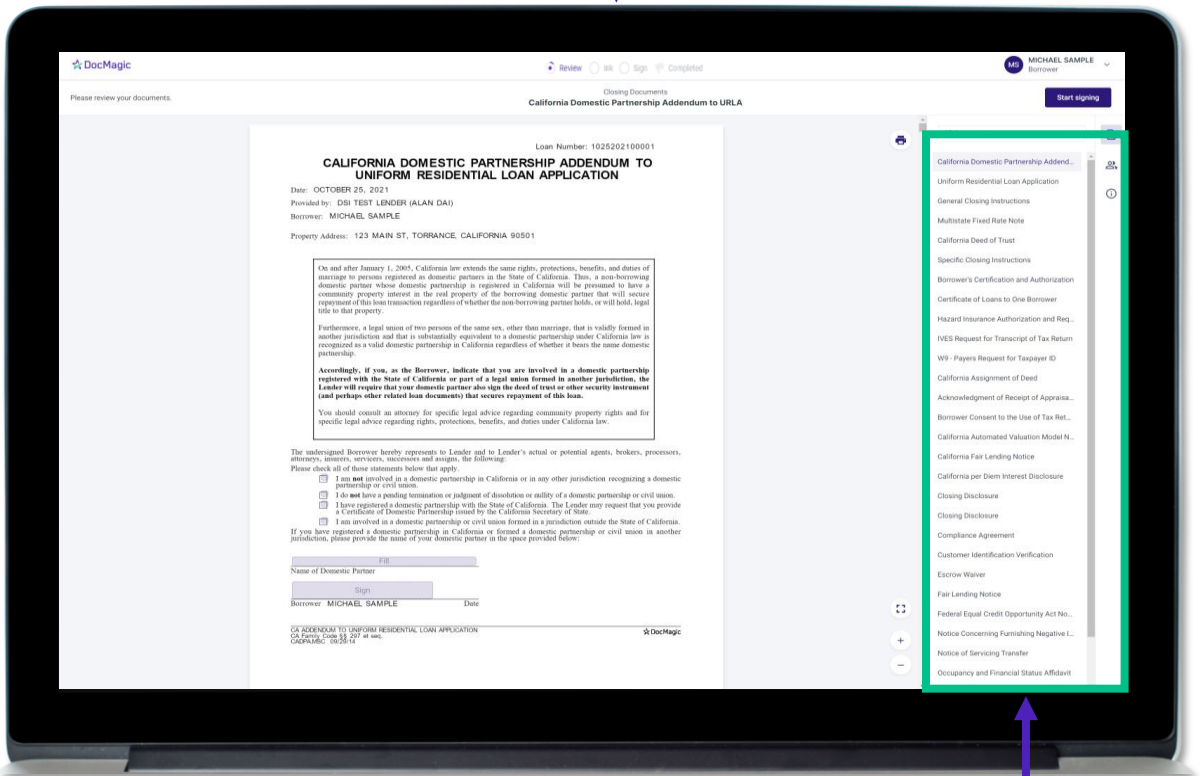
All documents are listed in this column on the right.

Page Features

The print icon allows you to print the documents.
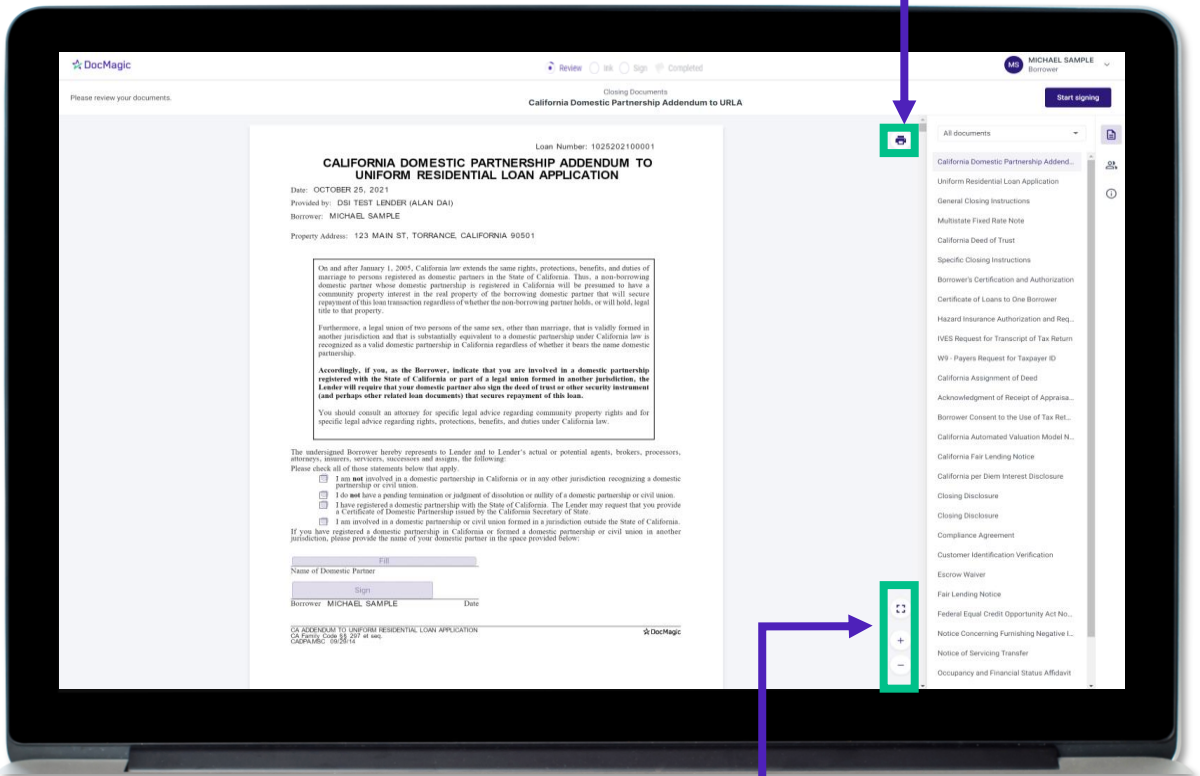
You can expand the signing window and increase or decrease the zoom levels.

Borrower Information

The borrower's information can be viewed and edited here.
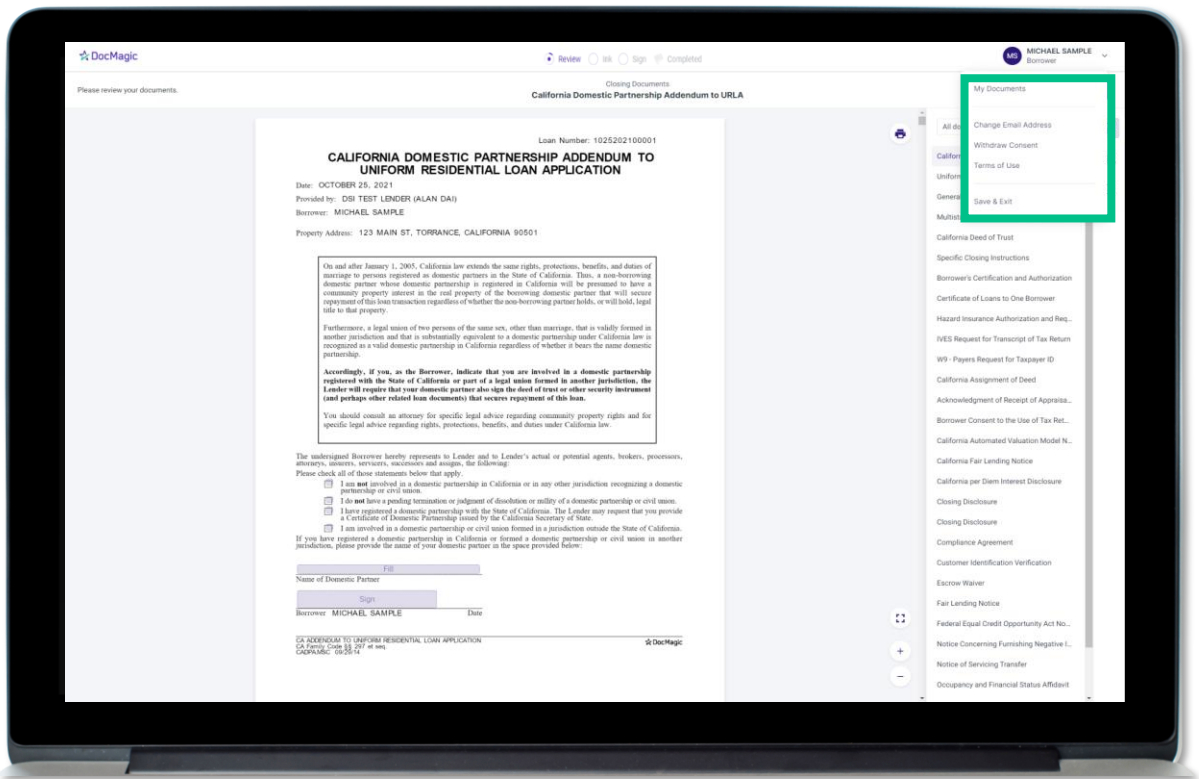
This button lists the
document information.

Participants
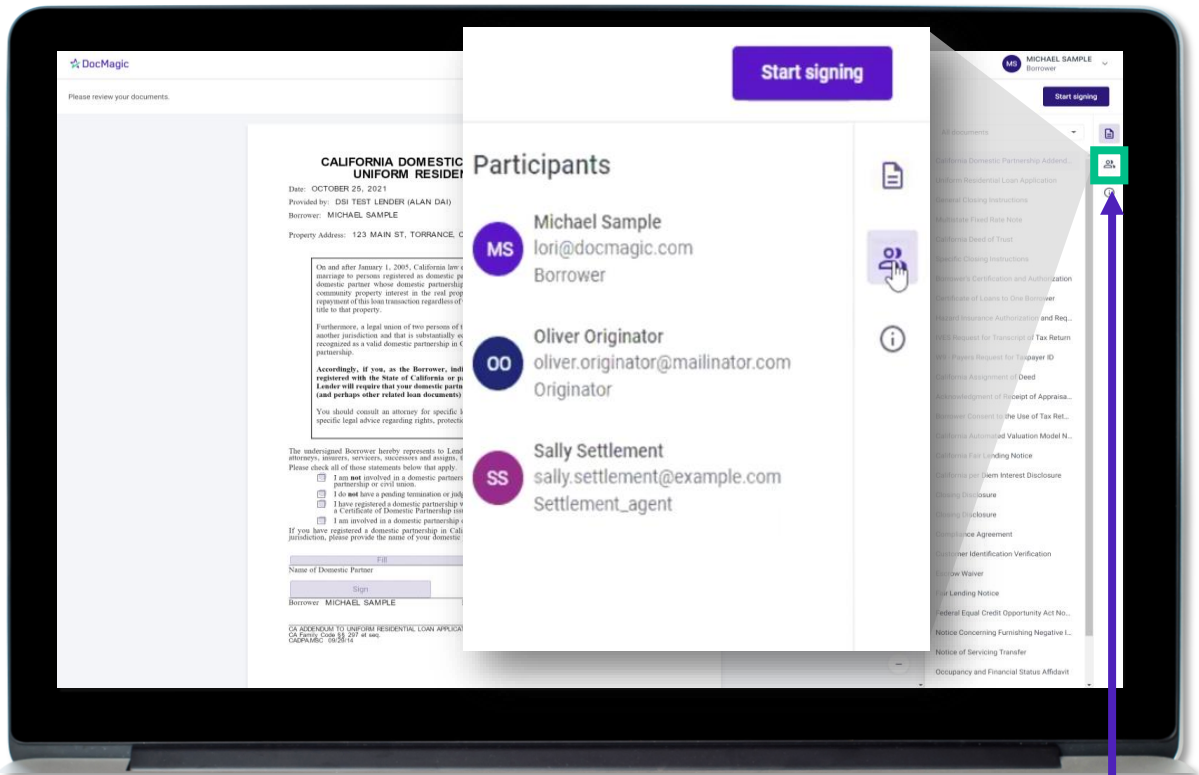
This button lists the participants.

This button brings you back to the list of documents.
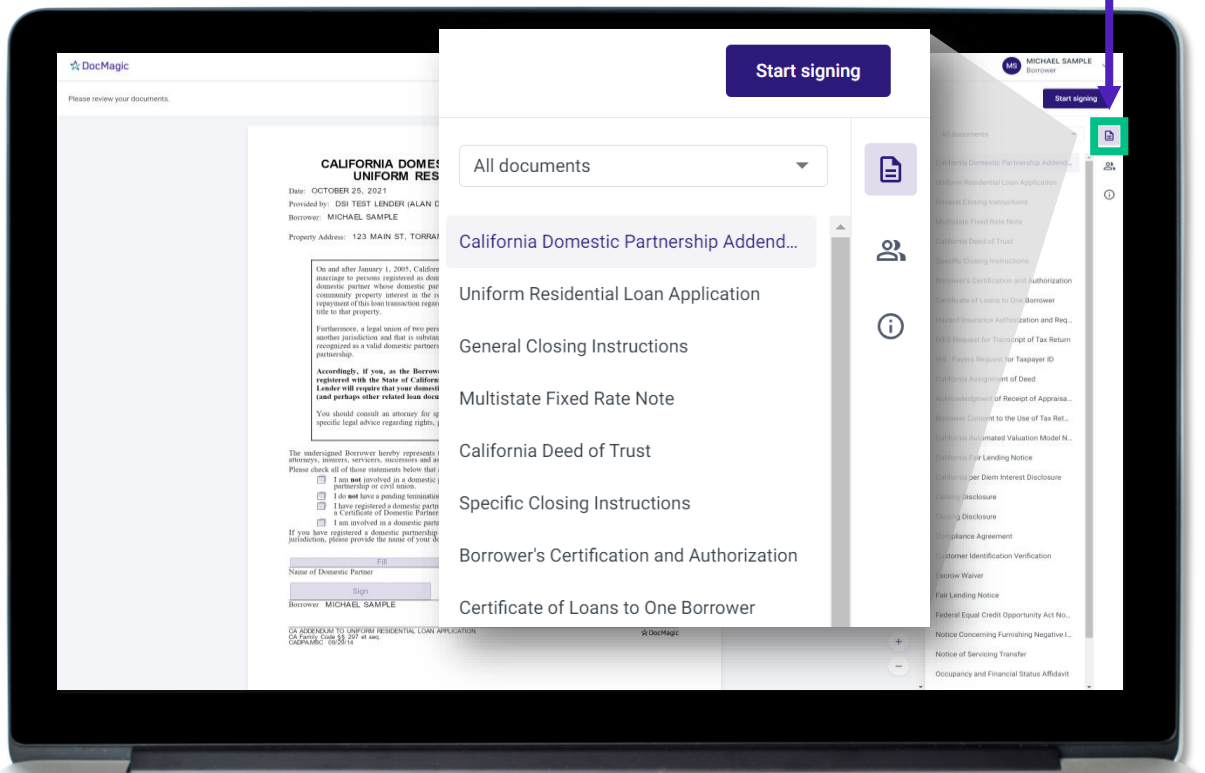
Start Signing

Click "Start Signing" to begin the signing process.
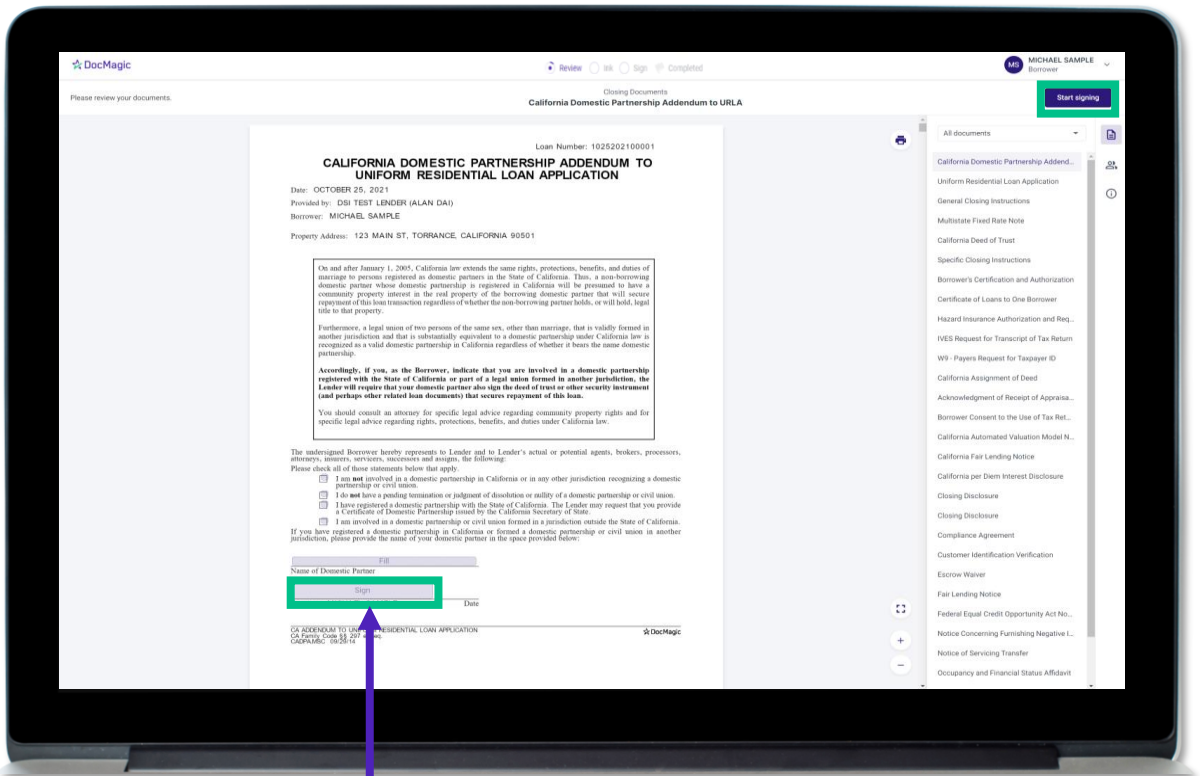
You can't sign anything until you hit the purple button in the top right corner – until then, these will remain greyed out and unsingable.

Begin Click-Signing

You have three options for click-signing.

1. Clicking the pen icon.

2. Clicking on the signature box directly.
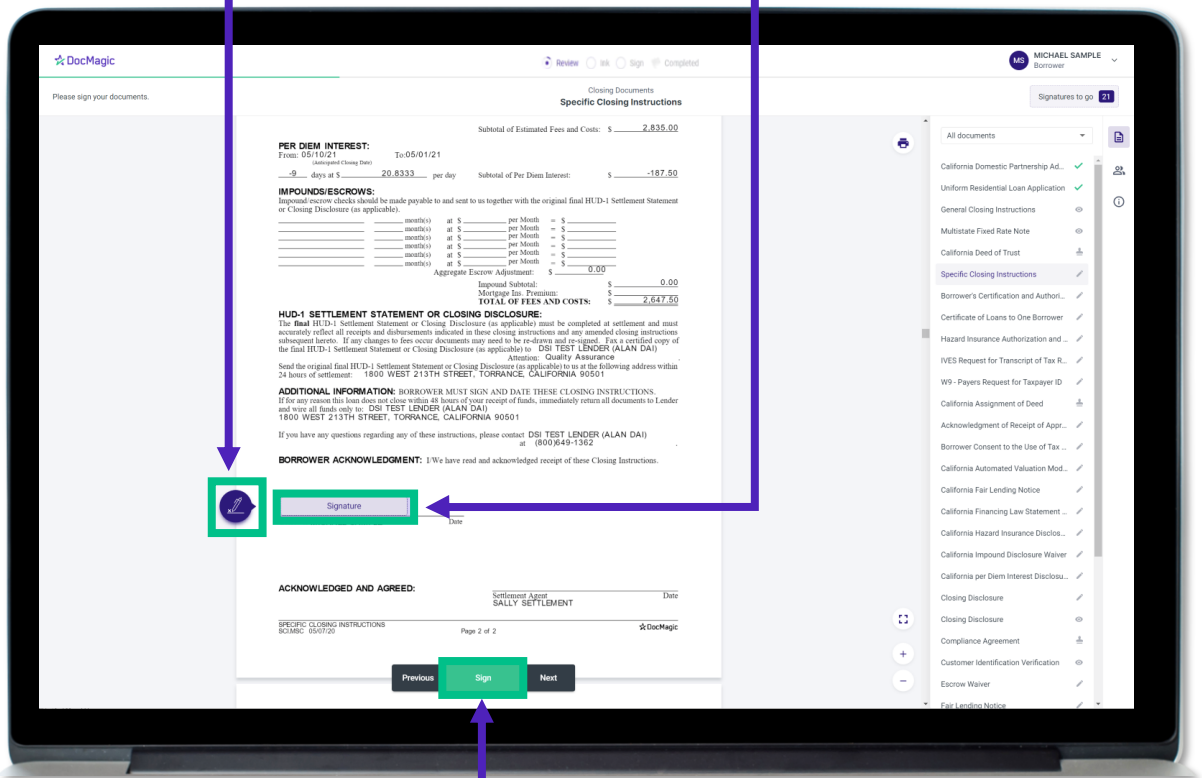
3. Clicking on the Green Sign box which will automatically advance to the next task each time.

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Signature Options

You have the option to choose the pre-formed signatures available in this tab.
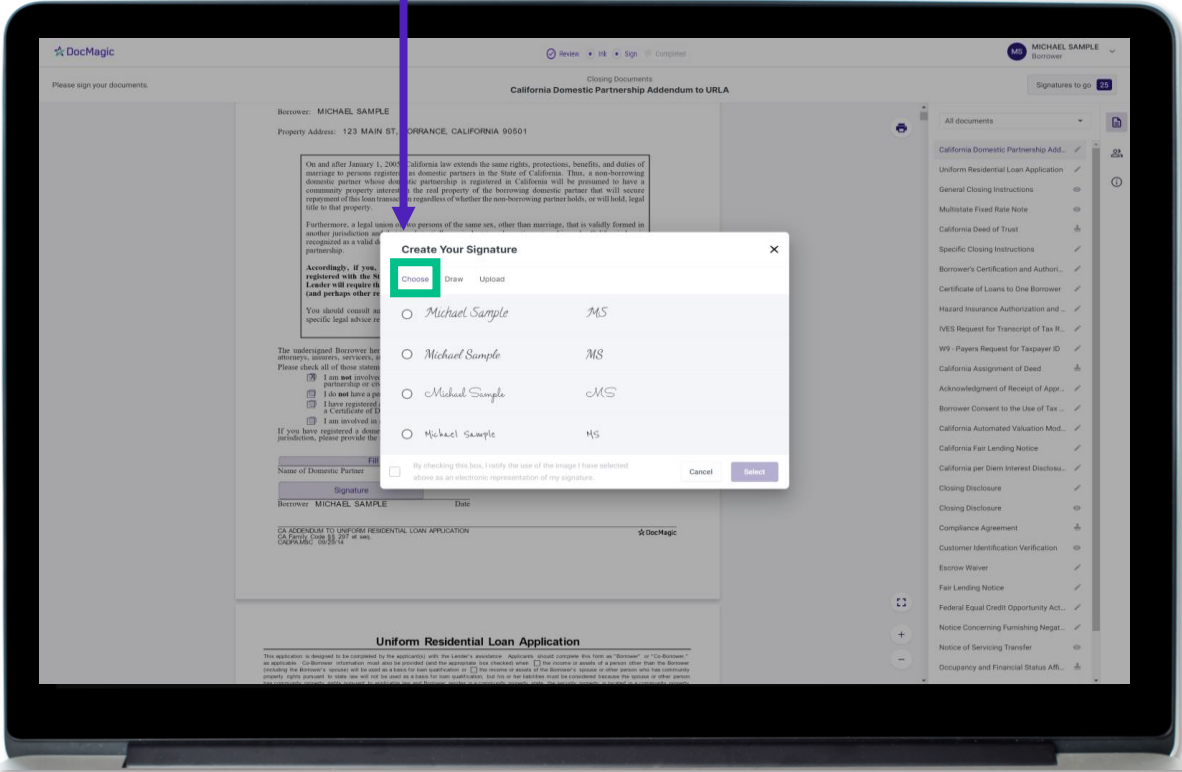
Signature Options

You can also create a signature and initials in the fields in this tab.
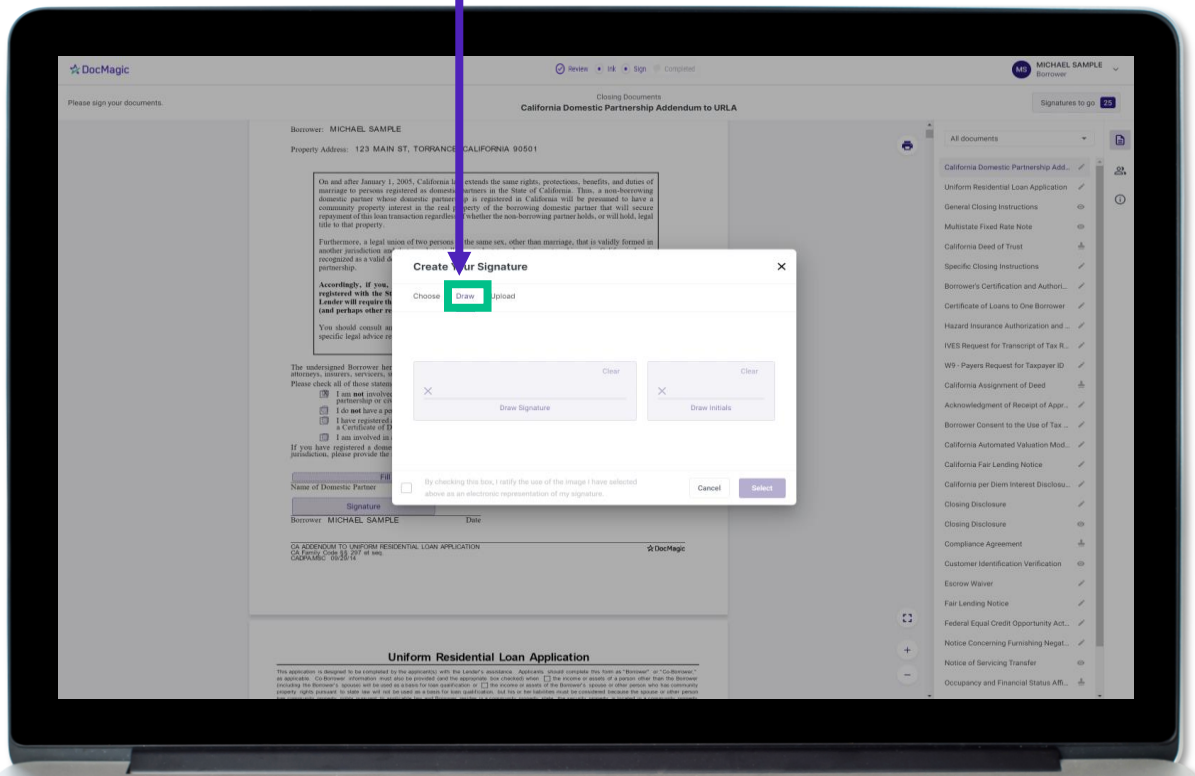
Signature Options

Another option is the ability to upload a .JPG or .PNG or your own signature if you have one on file.
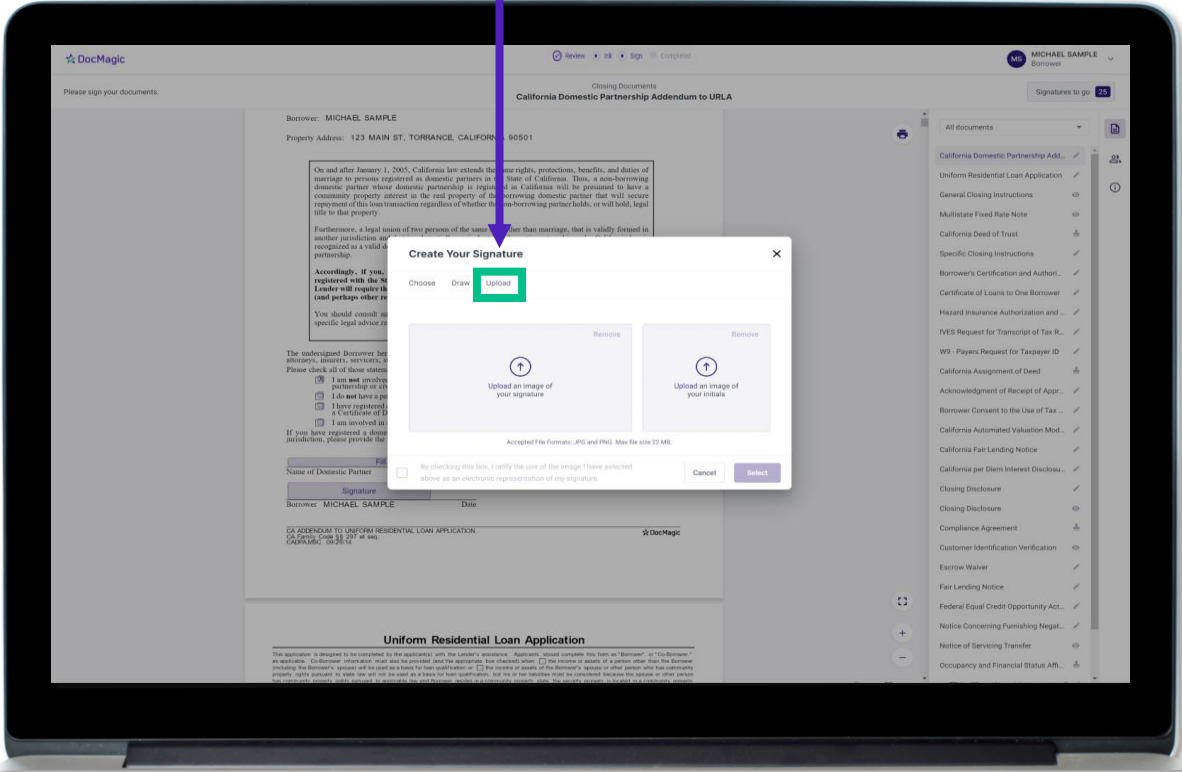
Signature Options

Regardless of what option you choose, remember to check the box authorizing use of your electronic signature. Then hit select.
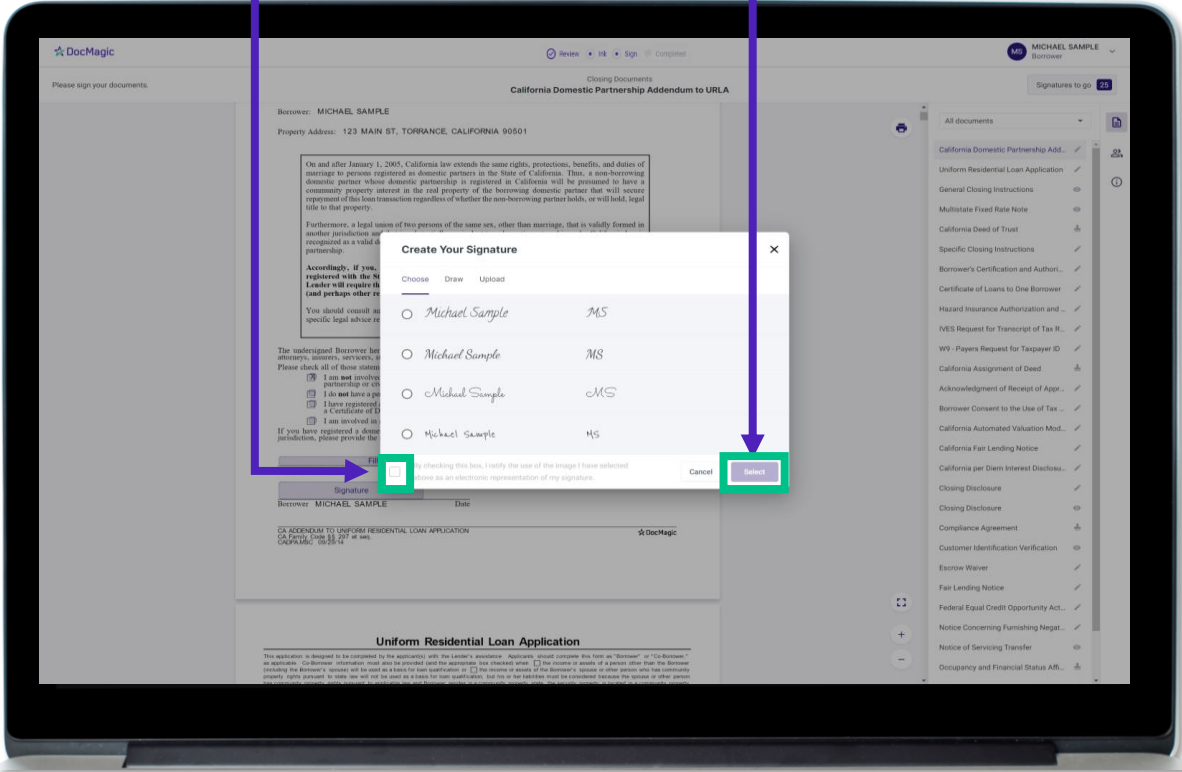
Check Boxes Required

You may be required to click a check box before signing certain documents. In these circumstances, you cannot proceed unless the box is checked.

Keeping Track of Your Progress

This countdown feature allows you to see how many signatures remain.
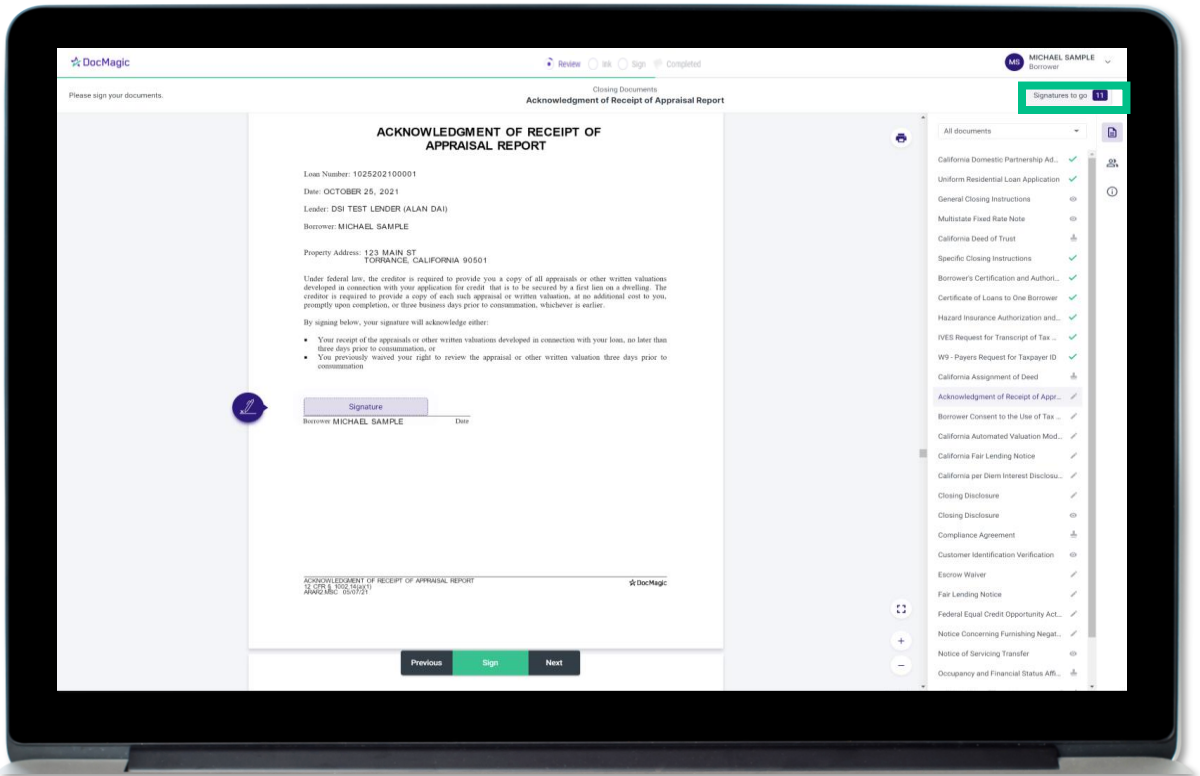
Keeping Track of Your Progress

You can also check the signed status of each document via these **green** check marks.
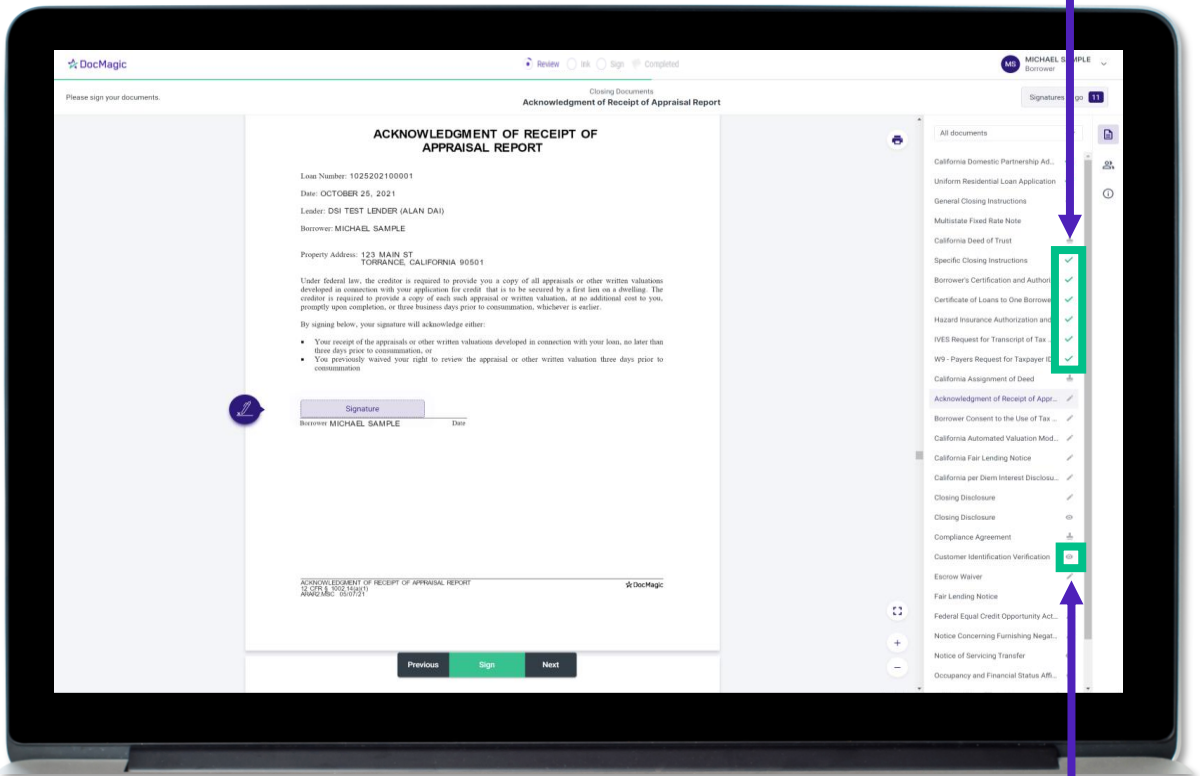
The eyeball icon indicates this is a document that does not require a signature.

Ink Signing: Download and Print

If you have any documents that need to be ink-signed, you'll be prompted to Print, Sign, Scan and Upload back into the system.
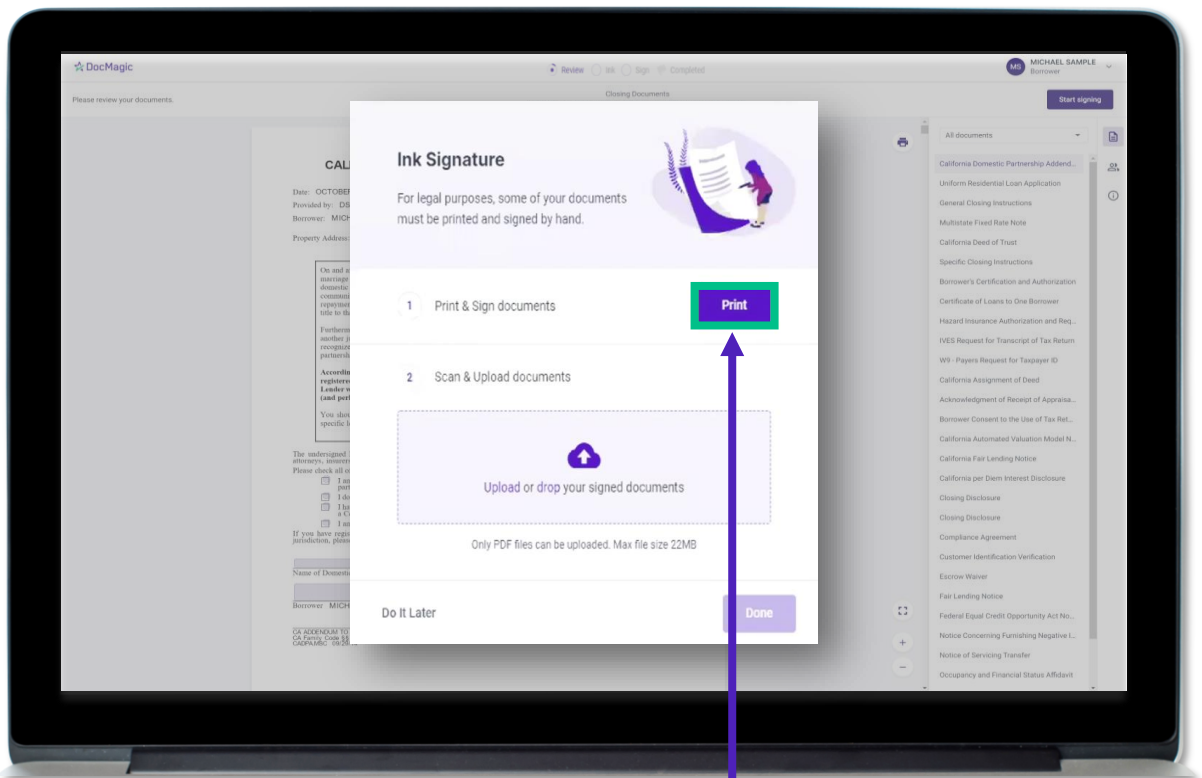
Click "Print" to start the ink-signing process.

Ink Signing: Download and Print

Once you click "Print" and start the process, you will receive instructions on how to sign.
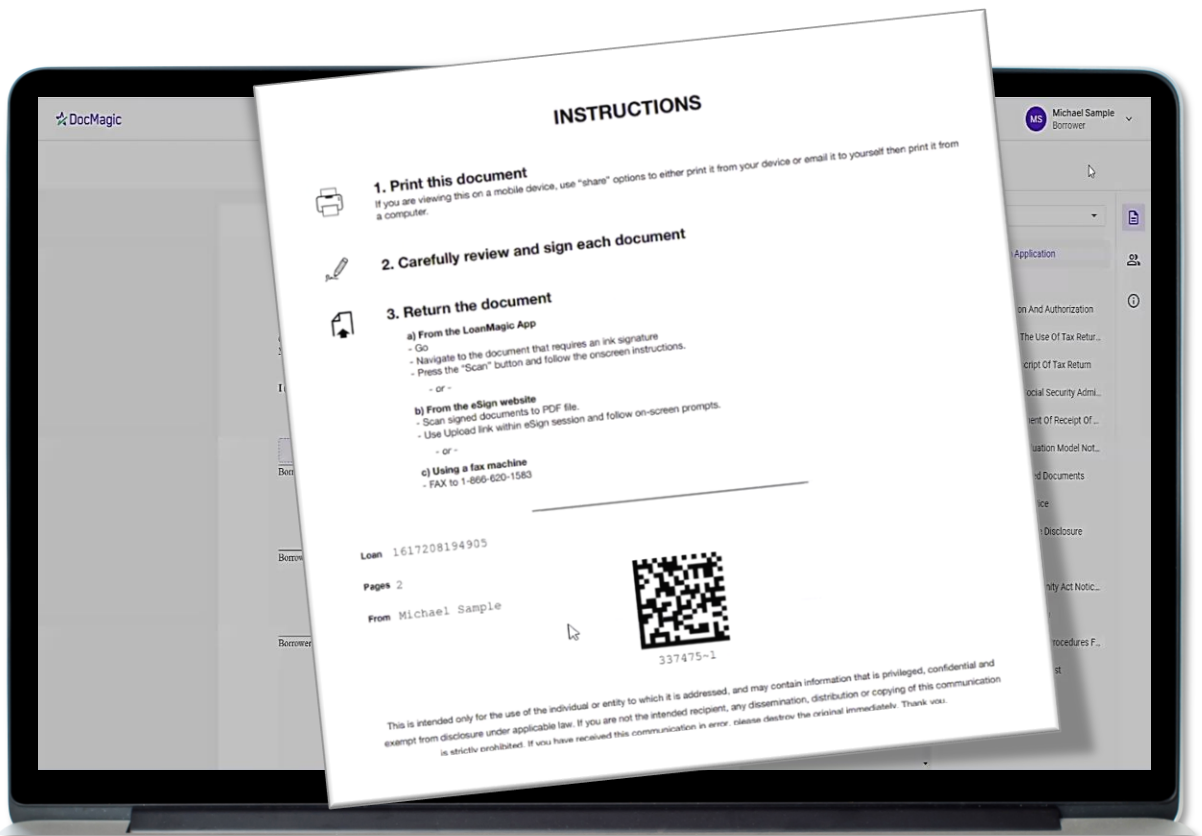
After you have ink-signed the appropriate documents, and scanned them back into the computer, click here to upload them.

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The QR Code on each page will place the signed documents in the right order in the stack and will mark the respective documents as complete in the Settlement Agent Portal.

Ink Signing: Verification

Once uploaded, the **Ink** circle is checked.

You will also see "Upload Successful".
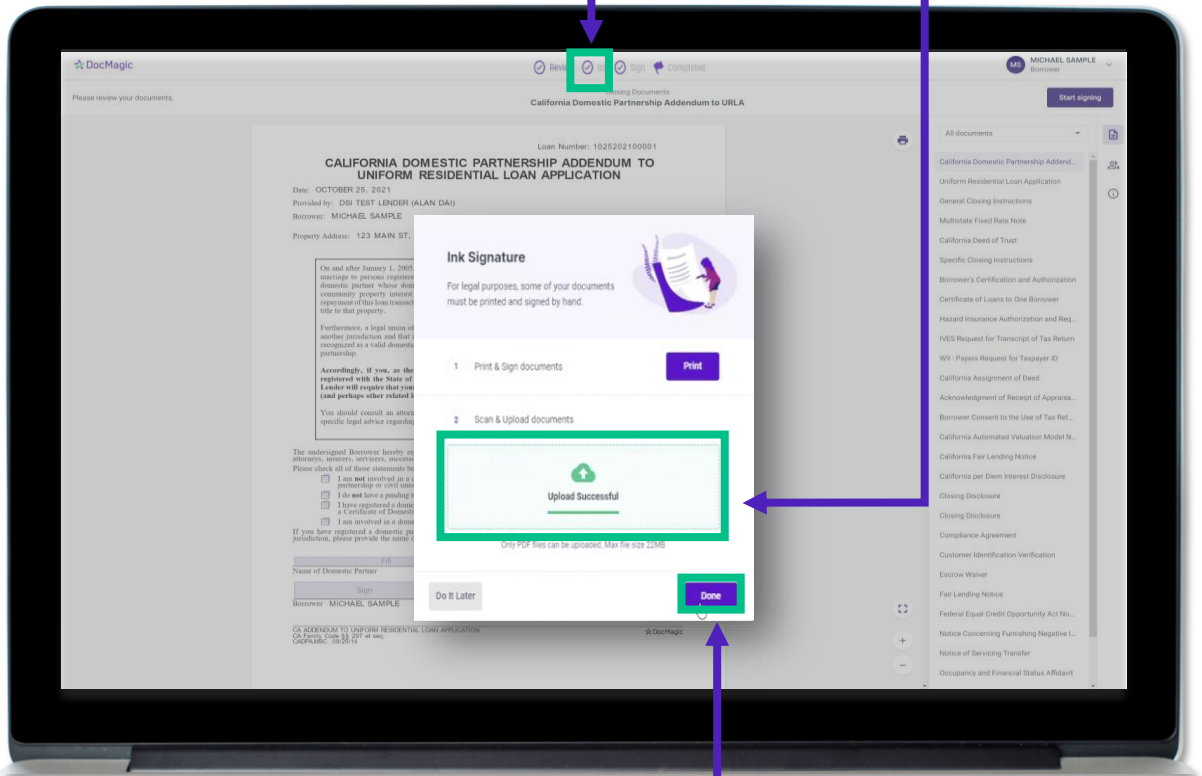
Click "Done" to complete the ink signing process, return to the stack, and click-sign the remaining documents.

When Complete

These icons will indicate when all signatures are collected.

Click done to complete the process.
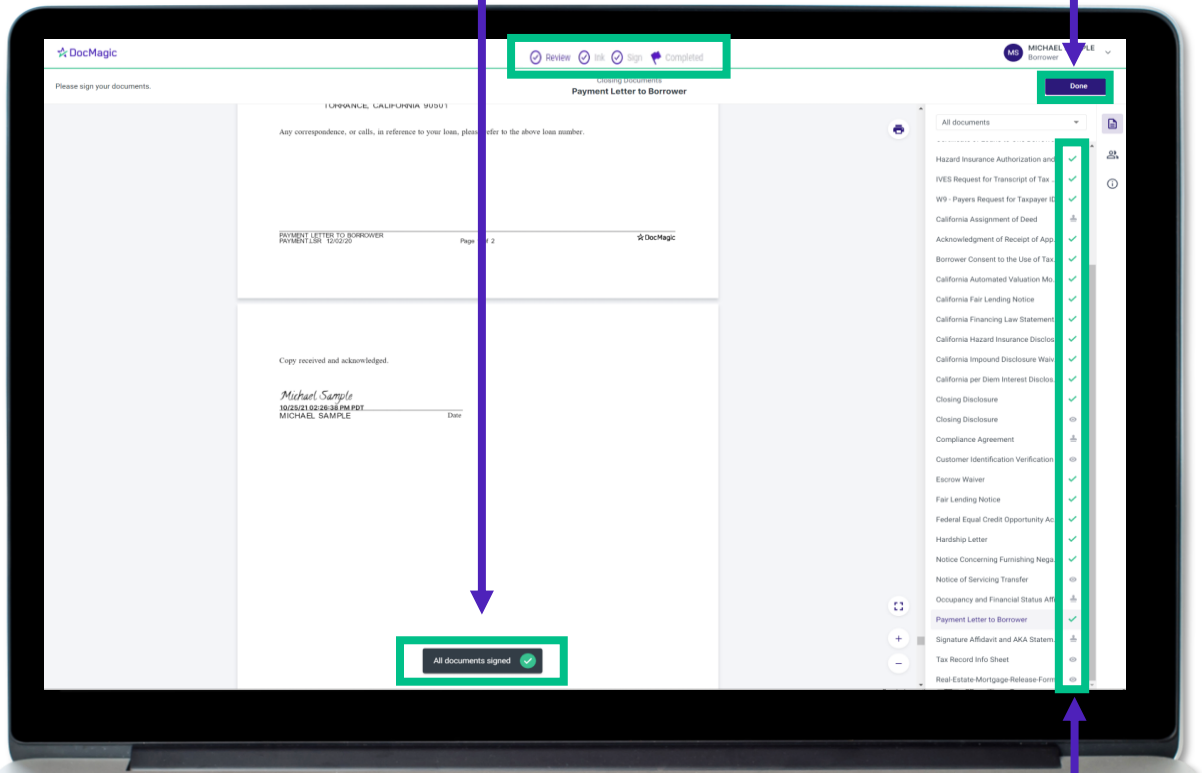
All applicable checkmarks will be green.

You will get this pop-up which also allows you to download the completed documents.
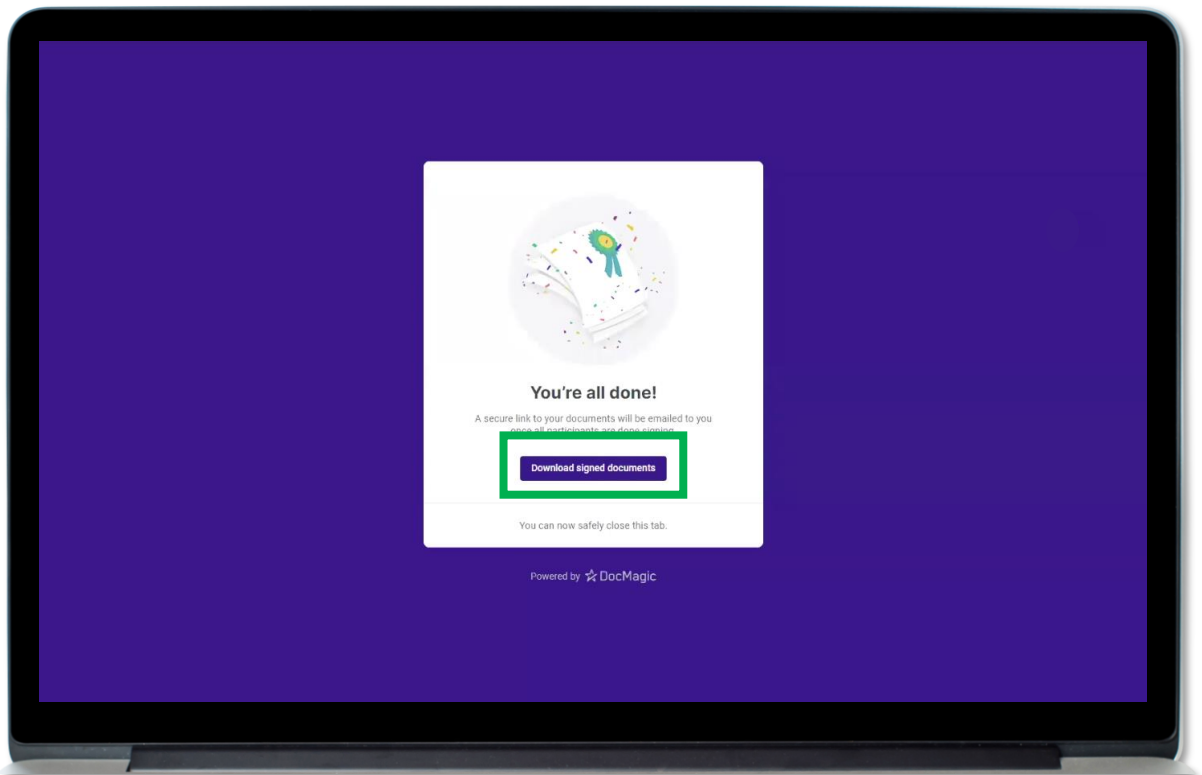
Lender's Confirmation

The Lender will be able to confirm that all documents are signed.

The Lender will also be able to download a PDF (PDF icon) and/or print (printer icon) the signed document stack.

DocMagic

eVault

Choosing a Hybrid 2 closing gives you access to DocMagic's eVault - a solution that offers real time control of your electronic loan files.

Supports All Data Formats

Provides storage and support for all data types and formats

Direct Connectivity

Direct eDelivery and seamless connectivity with the MERS® eRegistry

End-to-end Workflow

Instant and easy delivery to investors, services and sub-servicers

Limitless Options

Limitless integration options via robust API interface

Validate Electronic Records

Automatically validates the integrity of transferable electronic records

Manage eNote Processes

Manage current mortgage eNote processes and other transferable records

Document Integrity

Documents retain a tamper evident seal to ensure data and document integrity

Automated Reporting

Suite of automated reporting capabilities via platform

DELL

Accessing eVault

To access eVault, log onto DocMagic's website and click here on the dashboard.

eVault - Information

Information here pertains to the loan, borrower, MIN, Controller, Location, Servicer, Modified Date and extra Actions.

Account #:	100sales							
Worksheet #:				Loan #:				
MIN:				eVault Id:				

Back   Clear   **Search**

Show: 10 ∨ entries   Search:

LOAN #	BORROWER	WORKSHEET #	MIN	CONTROLLER	LOCATION	MASTER SERVICER	MODIFIED	ACTIONS
77704210946	SAM SAMPLE	1496	999935377042109467	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/21/2021	👁 ✎ 📄
1618938989939	Nicole Sample	1618938989939	999935389389899394	100ECLOSE	100ECLOSE	100 Sales (9999353)	04/20/2021	👁 ✎ 📄
1618939034620	Jazlyn Sample	1618939034620	999935389390346203	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/20/2021	👁 ✎ 📄
1618938966733	Jaiden Sample	1618938966733	999935389389667338	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/20/2021	👁 ✎ 📄
1618938623277	Boris Sample	1618938623277	999935389386232771	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/20/2021	👁 ✎ 📄
77704191155	SAM SAMPLE	1492	999935377041911400	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/19/2021	👁 ✎ 📄
77704191118	SAM SAMPLE	1488	999935377041911186	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/19/2021	👁 ✎ 📄
77704151017	SAM SMITH	1481	999935377041510178	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/15/2021	👁 ✎ 📄
77704121133	SAM SAMPLE	1471	999935377041211330	FHLB - San Francisco	FHLB - San Francisco	100 Sales (9999353)	04/12/2021	👁 ✎ 📄
77704120857	SAM SMITH	1470	999935377041208575	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/12/2021	👁 ✎ 📄

DELL

Click any of these icons to access the Assets.

eVault - Assets

Assets are the documents that were electronically signed during the transaction, including the eNote.

eVault Directory ▸ Assets

Assets

Account #: 100SALES

Authoritative Copy: Yes

Worksheet #: 1496   Loan #: 77704210946   Borrower: SAM SAMPLE

Type: Conventional   Purpose: Modified: 04/21/2021

Search:

TITLE/CLASS	NAME	MODIFIED	ACTIONS
Hardship Letter *HardshipLetter*	h.lsr.xml	04/21/2021	👁 📄 🖨 ✏ ⓘ
Signature Affidavit and AKA Statement *NameAffidavit*	saakas.msc.xml	04/21/2021	👁 📄 🖨 ✏ ⓘ
IVES Request for Transcript of Tax Return *IRS4506*	4506c.msc.xml	04/21/2021	👁 📄 🖨 ✏ ⓘ
AZACPRS.TTL.pdf *manuallyAddedDocument*	Custom Upload	04/21/2021	👁 📄 🖨 ✏ ⓘ
Initial Amortization Schedule *AmortizationSchedule*	ias.pmi.xml	04/21/2021	👁 📄 🖨 ✏ ⓘ
North Carolina Notice of Information and Examples of Amortization of Home Loans *Notice-Amortization*	nchlas.msc.xml	04/21/2021	👁 📄 🖨 ✏ ⓘ

DELL

This eNote is MISMO-compliant XML data specifically designed for eSignature.

Documentation that needs to be added to the package post-closing can be uploaded here.

Assets

Account #: 100SALES

Upload Asset

File Name:*	Choose File No file chosen
Title:*	
Document Class:	
Format Id:	
Reference Id:	
eNote?	☐

Cancel   Upload

ACTIONS

Hardship
Hardship

Signature
NameAffi

IVES Requ
IRS4506

AZACPRS
manuallyAddedaocument

Initial Amortization Schedule
AmortizationSchedule — las.pmi.xml — 04/21/2021

North Carolina Notice of Information and Examples of Amortization of Home Loans
Notice-Amortization — nchlas.msc.xml — 04/21/2021

Upload   Back

DELL

Start by clicking "Upload".

eVault – MERS eRegistry

Click on this icon to access the MERS Registry for each file.

	Account #:	100sales
	Worksheet #:		Loan #:	
	MIN:		eVault Id:	

Back Clear **Search**

Show: 10 entries   Search:

LOAN #	BORROWER	WORKSHEET #	MIN	CONTROLLER	LOCATION	MASTER SERVICER	MODIFIED	ACTION
77704210946	SAM SAMPLE	1496	999935377042109467	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/21/2021	👁 📄
1618938989939	Nicole Sample	1618938989939	999935389389899394	100ECLOSE	100ECLOSE	100 Sales (9999353)	04/20/2021	👁 📄
1618939034620	Jazlyn Sample	1618939034620	999935389390346203	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/20/2021	👁 📄
1618938966733	Jaiden Sample	1618938966733	999935389389667338	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/20/2021	👁 📄
1618938623277	Boris Sample	1618938623277	999935389386232771	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/20/2021	👁 📄
77704191155	SAM SAMPLE	1492	999935377041911400	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/19/2021	👁 📄
77704191118	SAM SAMPLE	1488	999935377041911186	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/19/2021	👁 📄
77704151017	SAM SMITH	1481	999935377041510178	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/15/2021	👁 📄
77704121133	SAM SAMPLE	1471	999935377041211330	FHLB - San Francisco	FHLB - San Francisco	100 Sales (9999353)	04/12/2021	👁 📄

DELL

When a note is signed electronically, it is immediately registered with MERS.

eVault Directory ▸ MERS eRegistry

MERS eRegistry

Account #: 100SALES

Details

MIN #	Loan #	Borrower #	Created
999935377042109467	77704210946	SAM SAMPLE	04/21/2021

eNotes 🗑 Unregister 🔄 Transfer 📄 Create eDelivery

Active	Authoritative Copy	Registered	Note Signed
Yes	Yes	04/21/2021	04/21/2021
Inactivated	Inactivated Status	Signature Validation	Assumption
		Y	N

Rights Holders Current Previous

Controller	Location	Master Servicer	Subservicer
100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	
Updated	Secured Party	Secured Party Delegatee	Delegatee for Transfers
04/21/2021			

Activity Log

TYPE	TRACKING #	INITIATED DATE	EFFECTIVE DATE	STATUS	ACTIONS

DELL

eVault – Authoritative Copy

In a Paper Note transaction, the original is sent back to the Lender.

In an eNote transaction, it's who possesses the "Authoritative Copy".

eVault Directory ▸ MERS eRegistry

MERS eRegistry

Account #: 100SALES

Details

MIN #	Loan #	Borrower #	Created
999935377042109467	77704210946	SAM SAMPLE	04/21/2021

eNotes 🔲 Unregister 🔲 Transfer 🔲 Create eDelivery

Active	Authoritative Copy	Registered	Note Signed
Yes	Yes	04/21/2021	04/21/2021
Inactivated	Inactivated Status	Signature Validation	Assumption
		Y	N

Rights Holders Current Previous

Controller	Location	Master Servicer	Subservicer
100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	
Updated	Secured Party	Secured Party Delegatee	Delegatee for Transfers
04/21/2021			

Activity Log

TYPE	TRACKING #	INITIATED DATE	EFFECTIVE DATE	STATUS	ACTIONS

DELL

A "Yes" indicates that you own the authoritative copy.

When you want to transfer the note, click Transfer. Then, choose the Action, Effective date, the Controller & Location.

Selecting eDeliver creates an electronic package with all the documents, including the eNote. The organization listed in location can access this information.

eVault Directory ▸ MERS eRegistry

MERS eRegistry

Account #: 100SALES

Details

MIN #
999935377042109467

Loan #
77704210946

eNotes 🔒 Unregister 🔄 Transfer   Create eD

Active
Yes

Authoritative
Yes

Inactivated

Inactivated St

Rights Holders   **Current**   Previous

Controller
100 Sales (9999353)

Location
100 Sales (99

Updated
04/21/2021

Secured Party

Activity Log

TYPE	TRACKING #	INITIATED DATE	EFFECTIVE DATE	STATUS	ACTIONS

MERS Transfer   ✕

Action:*	Transfer of Control & Location ⌄
Effective Date:*	04/21/2021 🗓
Controller:*	Fannie Mae ⌄
Location:*	Fannie Mae ⌄
eDeliver:	☑

Cancel   **Transfer**

DELL

Click Transfer when done.

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eVault – Authoritative Copy

When the recipient picks up the package, the Authoritative Copy will change to "No".

MERS eRegistry

eVault Directory ▸ MERS eRegistry

Account #: 100SALES

Details

MIN # 999935377041211330	Loan # 7770412133	Borrower # SAM SAMPLE	Created 04/12/2021

eNotes 🔁 Unregister 🔁 Transfer 🔁 Create eDelivery

Active Yes	Authoritative Copy No	Registered 04/12/2021	Note Signed 04/12/2021
Inactivated	Inactivated Status	Signature Validation Y	Assumption N

Rights Holders [Current] [Previous]

Controller FHLB - San Francisco	Location FHLB - San Francisco	Master Servicer 100 Sales (9999353)	Subservicer
Updated 04/14/2021	Secured Party	Secured Party Delegatee	Delegatee for Transfers

Activity Log

TYPE	TRACKING #	INITIATED DATE	EFFECTIVE DATE	STATUS	ACTIONS
Delivery	471938	04/14/2021		Success	ⓘ

DELL

Here you can see the location of the rights holders.

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eVault – Transfer Servicing

To transfer servicing, you can click here again.

eVault Directory ▸ MERS eRegistry

MERS eRegistry

Details

MIN #
999935377041211330

Loan #
7770412

eNotes 🔄 Unregister 🔄 Transfer 🔄 Creat

Active
Yes

Authorita
No

Inactivated

Inactivat

Rights Holders Current Previous

Controller
FHLB - San Francisco

Location
FHLB - S

Updated
04/14/2021

Secured

Activity Log

TYPE	TRACKING #	INITIATED DATE	EFFECTIVE DATE	STATUS	ACTIONS
Delivery	471938	04/14/2021		Success	ⓘ

MERS Transfer   ✕ ES

Action:*	Transfer of Servicer ▾
Effective Date:*	04/21/2021 📅
Master Servicer:*	Midwest Loan Services ▾
Subservicer:	Midwest Loan Services ▾
eDeliver:	☑

Cancel   Transfer

DELL

DocMagic

Final Actions & Confirmation

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 and fields are completed, the Settlement Agent will see a fully completed column on the right.

Notification emails are sent to all parties when the transaction and signatures are complete.

The email will allow the Borrower to download their signed and notarized document package from a provided link.