



eClose with AutoPrep – Hybrid 3  
With Settlement Agent Portal and Borrower's Experience

GUIDEBOOK

# Hybrid 3 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 3 eClose Process

Processing Closing Documents in Your LOS	4
✓ Selecting DocMagic eSign for Hybrid 3	
✓ Sending Closing Documents	
Lender Portal	12
✓ Monitor Activity	
✓ Reminder Emails	
✓ Documents Tab	
DocMagic Settlement Agent Portal	16
✓ Features	
✓ AutoPrep	
✓ Wetsign with QR Code	
✓ Assigning a Notary	
Borrower Experience	61
✓ Portal sign-in / Features	
✓ Signing Experience	
eNotary Experience	88
✓ Portal sign-in / Features	
✓ Authentication / Identity Validation	
✓ Remote Online Notarization and eClosing	
Final Actions & Confirmation	119



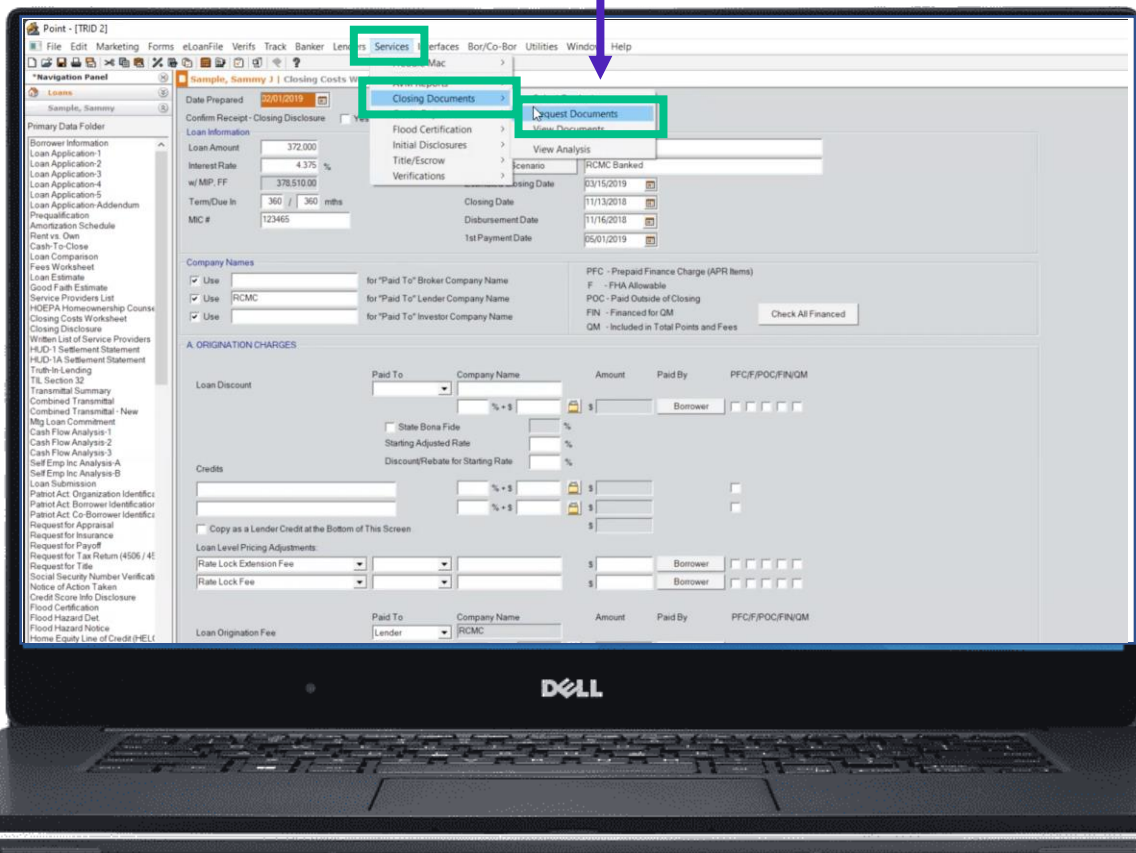


Processing Closing Documents in LOS



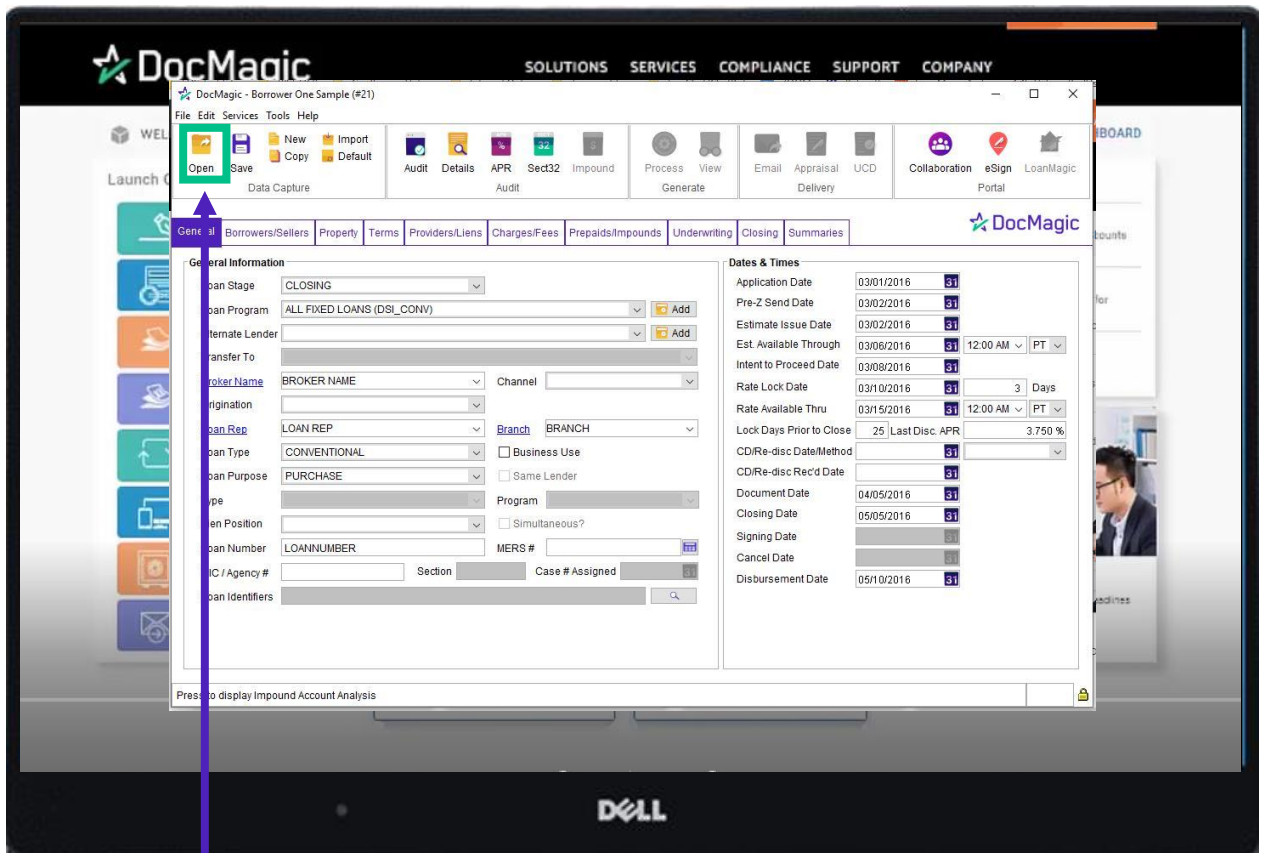
# Closing Documents in Your LOS

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 eNotarization, 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.

The screenshot displays the DocMagic software interface. The main window is titled "DocMagic - Borrower One Sample (#21)". The interface includes a menu bar (File, Edit, Services, Tools, Help) and a toolbar with various icons for actions like Open, Save, New, Copy, Import, Audit, Details, APR, Sec32, Impound, Process, View, Generate, Email, Appraisal, Delivery, UCD, Collaboration, eSign, and LoanMagic. Below the toolbar is a navigation pane with tabs: General, Borrowers/Sellers, Property, Terms, Providers/Liens, Charges/Fees, Prepays/Impounds, Underwriting, Closing, and Summaries. The "Closing" tab is active, showing two main sections: "General Information" and "Dates & Times".

**General Information**

Loan Stage	CLOSING
Loan Program	ALL FIXED LOANS (DSL_CONV)
Alternate Lender	
Transfer To	
Broker Name	BROKER NAME
Channel	
Origination	
Loan Rep	LOAN REP
Branch	BRANCH
Loan Type	CONVENTIONAL
Business Use	<input type="checkbox"/>
Loan Purpose	PURCHASE
Same Lender	<input type="checkbox"/>
Type	
Program	
Lien Position	
Simultaneous?	<input type="checkbox"/>
Loan Number	LOANNUMBER
MERS #	
MIC / Agency #	
Section	
Case # Assigned	
Loan Identifiers	

**Dates & Times**

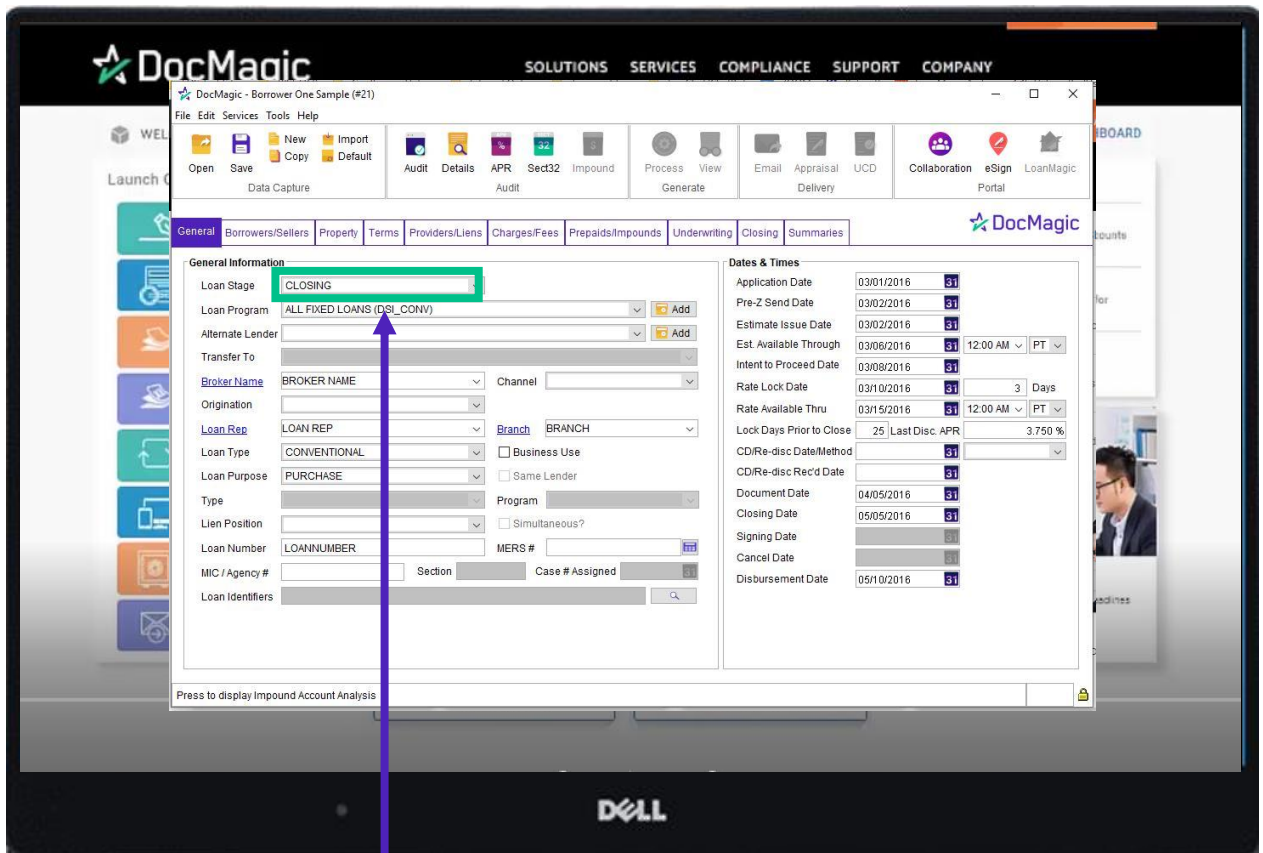
Application Date	03/01/2016
Pre-Z Send Date	03/02/2016
Estimate Issue Date	03/02/2016
Est. Available Through	03/06/2016 12:00 AM PT
Intent to Proceed Date	03/08/2016
Rate Lock Date	03/10/2016
Rate Available Thru	03/15/2016 12:00 AM PT
Lock Days Prior to Close	25 Last Disc APR 3.750 %
CD/Re-disc Date/Method	
CD/Re-disc Rec'd Date	
Document Date	04/05/2016
Closing Date	05/05/2016
Signing Date	
Cancel Date	
Disbursement Date	05/10/2016

Press to display impound Account Analysis



# 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 you process.

**Loan Detail Report**

Loan Number: 777012520220001      File ID: 2252  
Borrower Name: JOHN SMITH      Client Number: 100SALES  
Property Address: 935 WILLOW STREET, BURLINGTON NJ 08016      Date of Report: 01/25/2022

**DETAILS**

**LENDER INFO**

Lender Name: DSI TEST LENDER (SALES)      Transfer To:  
Loan Program: ALL FIXED LOANS (DSI\_CONV)

**LOAN IDENTIFIERS**

Loan Number: 777012520220001      FHAVA Case:      MERS #: 9999353-2520220001-4  
Loan Purpose: Purchase      Loan Type: Conventional      Origination Type: Lender  
FHA Section:      MIC #:      Loan Rep:      Broker Name:      Branch:

**IMPORTANT DATES**

Amount
\$250,000.00
\$100.00
\$249,900.00



# Processing Documents – Hybrid 3

Process the Document set.

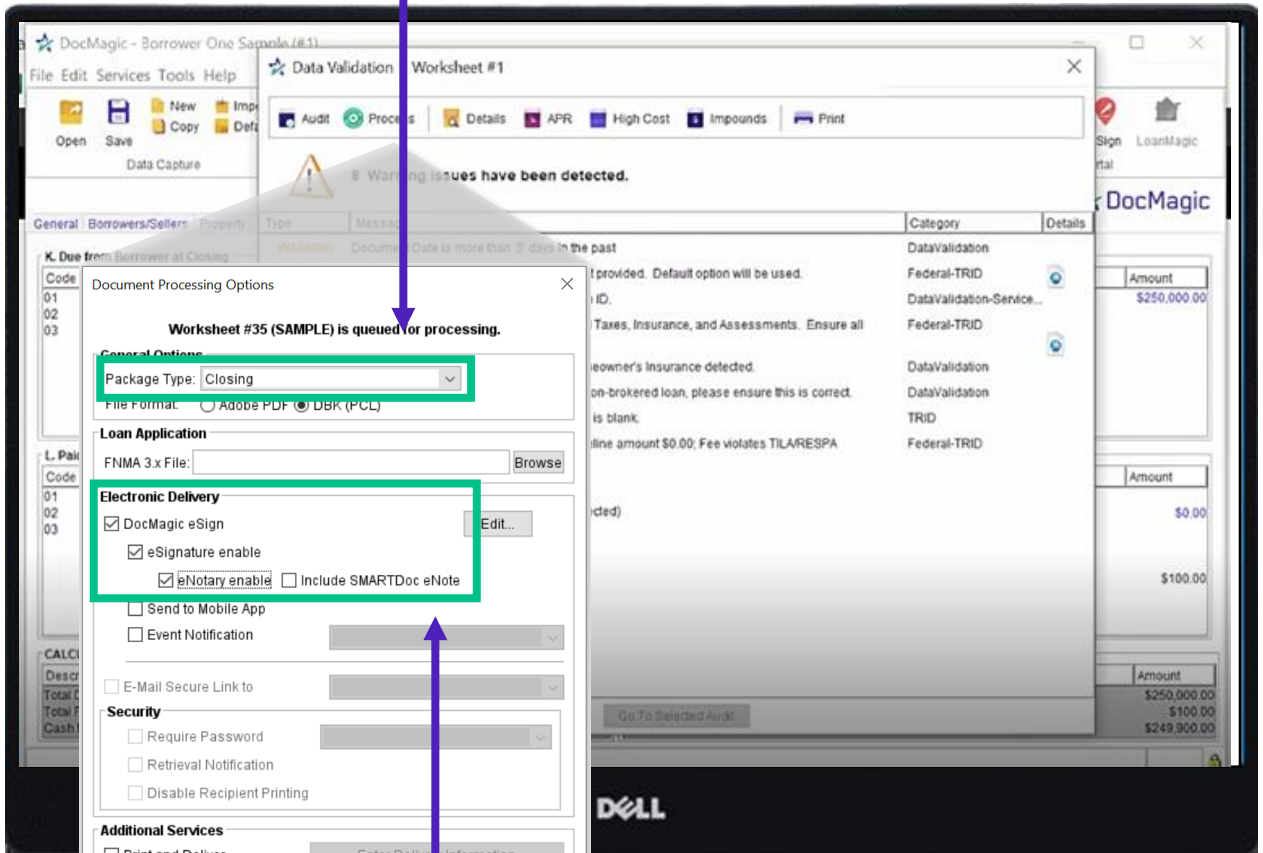
The screenshot shows the DocMagic software interface. A window titled "Data Validation - Worksheet #1" is open, displaying a table of warning issues. The "Process" button in the toolbar is highlighted with a green box. A blue arrow points from the text "Process the Document set." to this button. The table lists 8 warning issues and 2 messages.

Type	Message	Category	Details
WARNING	Document Date is more than '5' days in the past	DataValidation	
WARNING	Deficiency Rights Preserved information not provided. Default option will be used.	Federal-TRID	
WARNING	Settlement Agent is missing Email, License ID.	DataValidation-Service...	
WARNING	Only escrowed items included in Estimated Taxes, Insurance, and Assessments. Ensure all mortgage-related obligations are entered.	Federal-TRID	
WARNING	Purchase Transaction with no prepaid Homeowner's Insurance detected.	DataValidation	
WARNING	You have entered Broker Information on a non-brokered loan, please ensure this is correct.	DataValidation	
WARNING	Intent to service or transfer service indicator is blank.	TRID	
WARNING	Transfer Taxes (TSF) \$35.00 exceeds baseline amount \$0.00, Fee violates TILA/RESPA Tolerance.	Federal-TRID	
MESSAGE	Worksheet Saved		
MESSAGE	Worksheet Audited (outstanding audits detected)		



# Processing Documents – Hybrid 3

Choose "Closing"  
for Package Type.



Select these boxes for  
a Hybrid 3 closing.



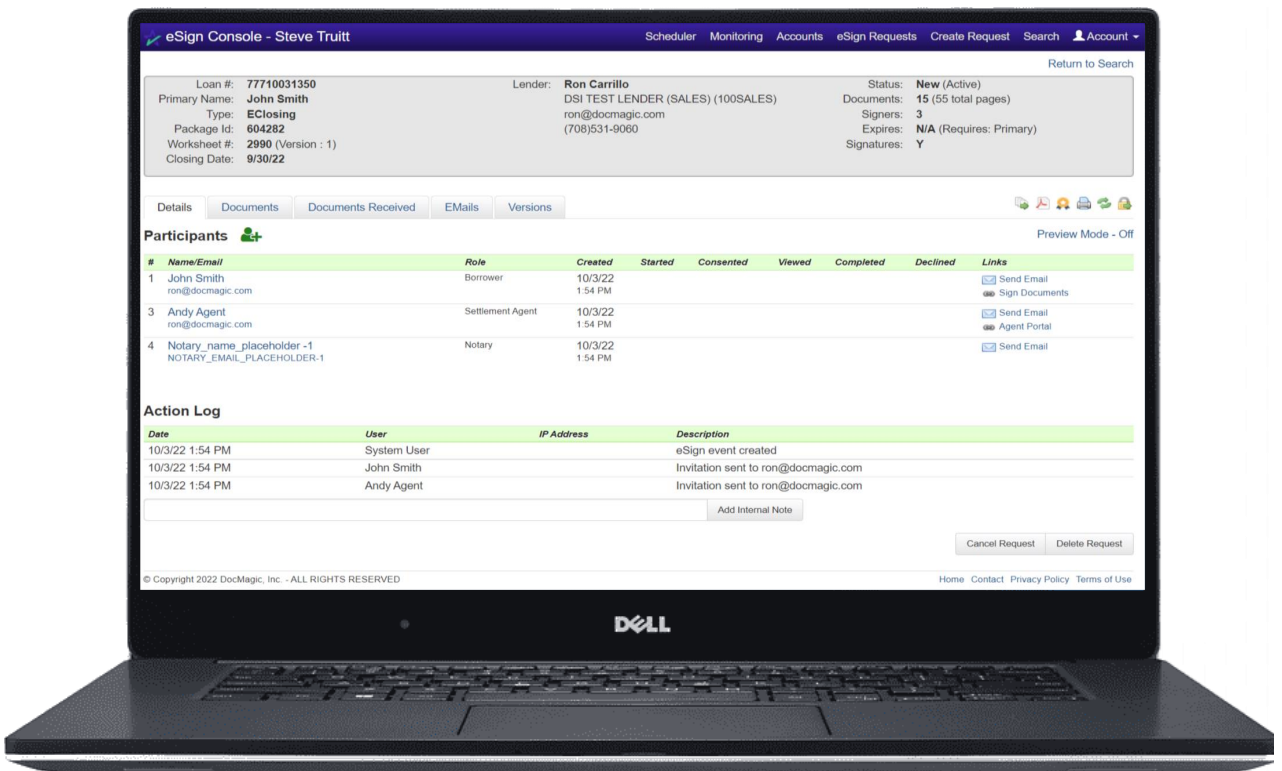


Lender Portal



# 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.

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'eSign Console - Steve Truitt', 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area is divided into several sections:

- Loan Details:** Loan #: 77710031350, Lender: Ron Carrillo (DSI TEST LENDER (SALES) (100SALES)), Status: New (Active), Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y.
- Participants Table:** A table with columns: #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, Links. The 'Links' column for the Borrower and Settlement Agent includes a 'Send Email' link, which is highlighted by a red box and a callout arrow.
- Action Log Table:** A table with columns: Date, User, IP Address, Description. It shows three entries: 'eSign event created', 'Invitation sent to ron@docmagic.com', and 'Invitation sent to ron@docmagic.com'.

At the bottom of the interface, there are buttons for 'Cancel Request' and 'Delete Request', and a footer with copyright information and links to Home, Contact, Privacy Policy, and Terms of Use.



# Lender Portal

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

The screenshot displays the 'eSign Console - Steve Truitt' interface. At the top, there are navigation tabs: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below this is a summary section for a loan with the following details:

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

Below the summary is a 'Documents' tab, which is highlighted in green. The 'Documents' section contains a table with the following columns: Document Name, ClickSign, Page(s), Mark(s), Signer(s), Completed, Sigreq, Document Id | Document Id, Filename, Delete, and Operation.

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	urlali.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	njpw.t.msc.xml		
15 Signature Affidavit and AKA Statement		0/2	1	1			5175552   5187053	saakas.msc.xml		Mark as Complete

At the bottom of the interface, there is an 'Add Internal Note' button. The Dell logo is visible at the bottom center of the screen.

You can check the status of the signature process here.

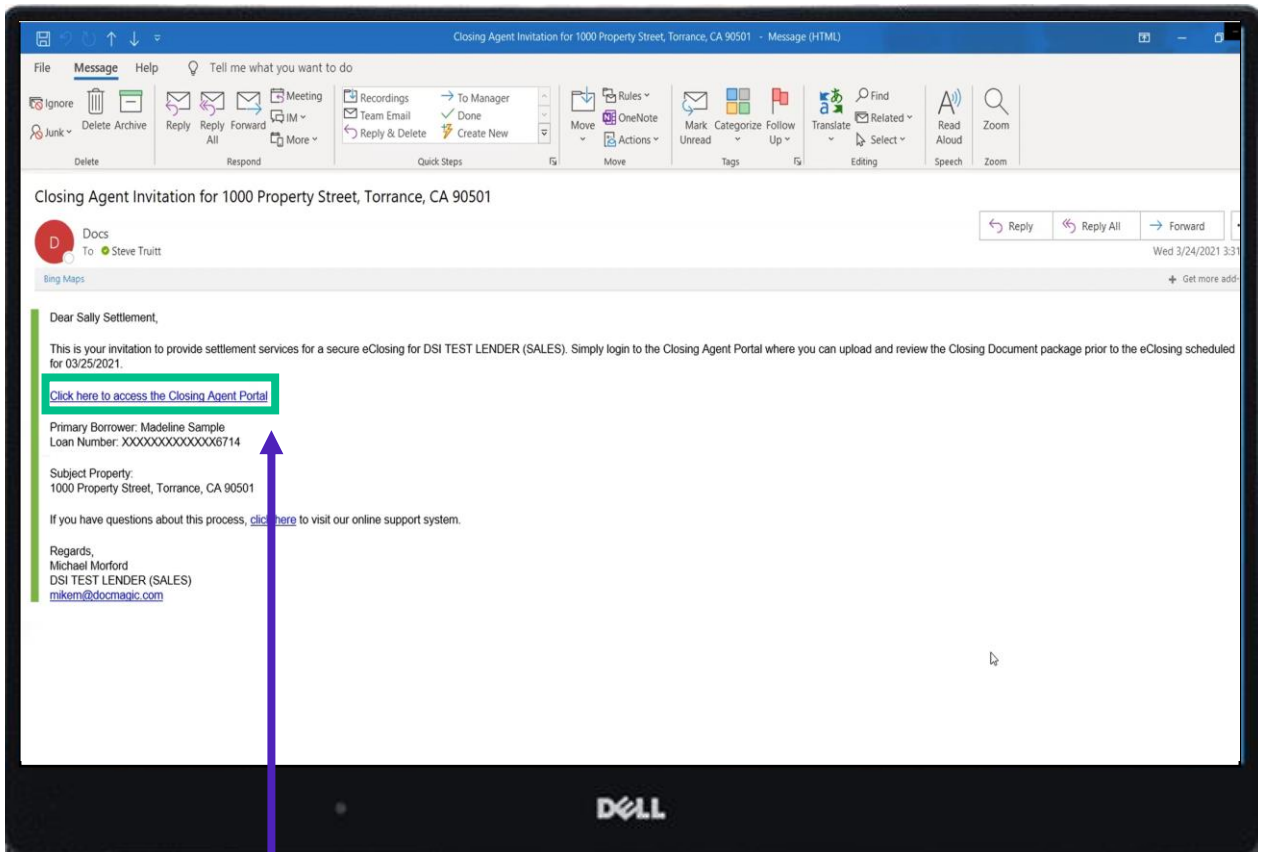




Settlement Agent Process

# Settlement Agent Invitation Email

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

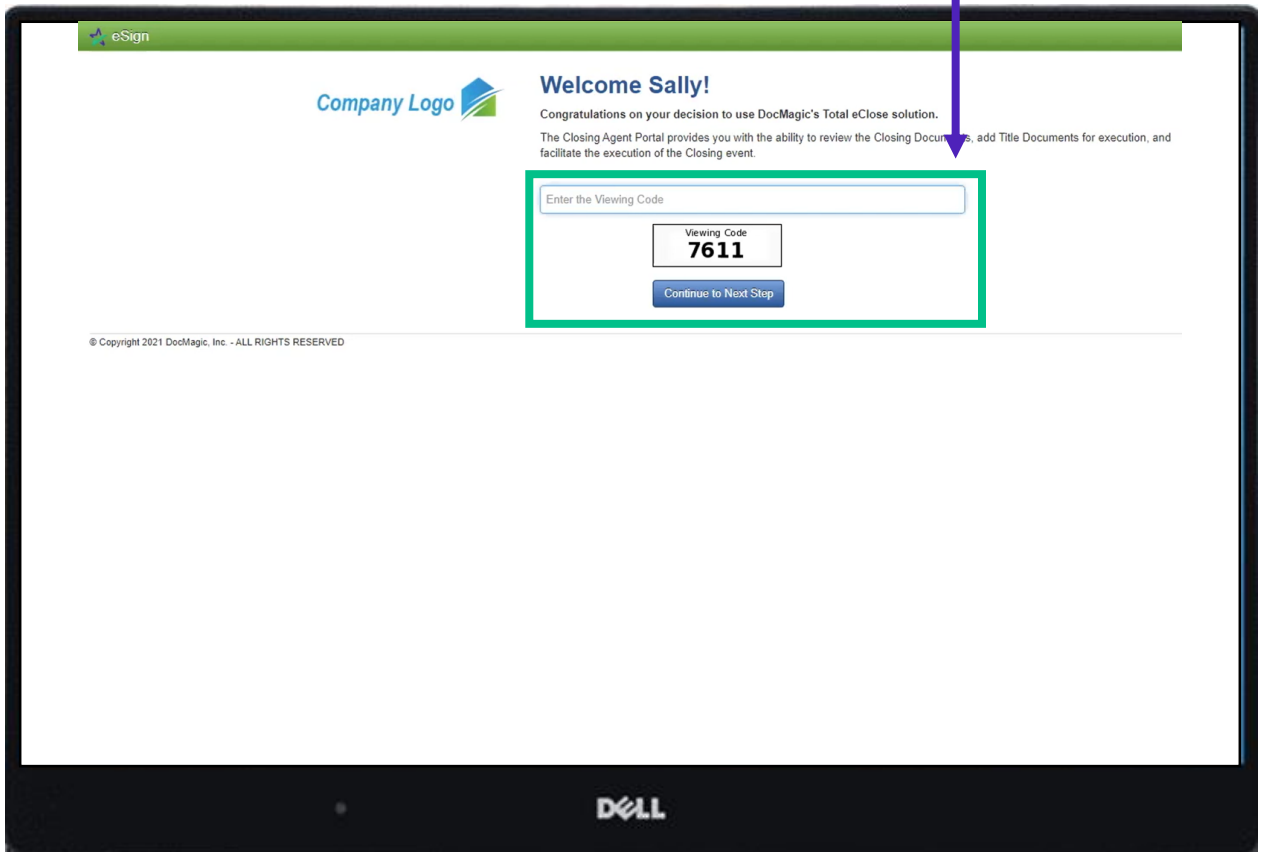


This link, along with the email is specific to this particular transaction.



# Agent Login

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



# eClose Console

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

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

The screenshot displays the DocMagic eClose Console (Settlement Agent) interface. At the top, the DocMagic logo and "eClose Console (Settlement Agent)" are visible, along with a user profile for "Sally".

The main content area is divided into several sections:

- LOAN:** Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER:** Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Navigation:** Buttons for Details, eJournal, Action Log, and Ready to Close.
- Signers (2):** A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are listed, all marked as completed.

The Dell logo is visible at the bottom center of the screen.



# Countdown Clock

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

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



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

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

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

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

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

**Signers (2)** [Assign Notary](#)

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

**Documents (15)** [Preview Mode](#)

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

DELL





# Help Button

From the Agent Portal, you can find a tutorial just like the one you're reading now. Just click on the name, then Help.

**DocMagic eClose Console (Settlement Agent)**

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

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

**COUNTDOWN TO CLOSING**  
DAYS: -  
HOURS: -  
Date: Apr 19, 2023 (Wed)

**Signers (2)**

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	📧 ⓪	📷 ⓪
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned			

**Documents (15)**

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



# Signer's Tab

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

The screenshot shows the Doc Magic eClose Console interface. At the top, there's a navigation bar with 'Doc Magic eClose Console (Settlement Agent)' and a user profile 'Sally'. Below this, 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 'COUNTDOWN TO CLOSING' (Date: Apr 19, 2023 (Wed) Time: 12:00am PDT). The 'Details' tab is selected in the navigation bar. The 'Signers (2)' section is highlighted with a green box and contains the following table:

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

Below the signers table, there's a 'Documents (15)' section with a 'Preview Mode' toggle set to 'ON'. The documents table is as follows:

#	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 interface. A modal window titled "Participant Details" is open, showing the following information:

- 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

At the bottom of the modal are three buttons: "Cancel", "Delete", and "Save".

In the background, the "Signers (2)" list is visible, with "Erica Sample" highlighted. The "Documents (15)" list includes items like "Uniform Residential Loan Application" and "MERS California Deed of Trust".



# Adding Participants

Click on the Silhouette Icon to add a participant.

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

The screenshot displays the DocMagic eClose Console interface. A central 'Add Participant' dialog box is open, prompting the user to 'Add the participant's information below'. The dialog includes input fields for First Name, Last Name, Email, Phone Number (with a format guide ( ) - - - - -), and Access Code. A 'Role' dropdown menu is set to 'Select Role'. At the bottom of the dialog are 'Cancel' and 'Add' buttons, with the 'Add' button highlighted by a green box. In the background, the console shows loan details (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081), a 'LENDER' section, a 'COUNTDOWN TO CLOSING' timer (Days: 1, Hours: 1, Minutes: 1, Seconds: 1), and a list of documents (15 total) with columns for '#', 'eSign Enabled', and 'Completed'. A 'Signers (2)' list is also visible, showing Erica Sample and Sally Settlement.

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.

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

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

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

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

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

**Signers (2)** [Assign Notary](#)

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

**Documents (15)** [Preview Mode](#)

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

**DELL**



# Notary - Signer's Tab

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

**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	✉️ ⓪	📄 ⓪	● 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



# Notary - Signer's Tab

The closing date and time is listed here. You can edit this right in the window, or in the Assign Notary pop-up.

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

- LOAN**: Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER**: Company: DOSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING**: A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Signers (2)**: A table listing the signers. The 'Notary Type / Closing Date - Time' column for the first signer is highlighted with a green box and pointed to by a purple arrow.
- Documents (15)**: A table listing the documents to be signed.

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

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



# 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.

**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	✉️ ⓪	📄 ⓪	● Not Started	<a href="#">Get Signer 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	✓

**Preview Mode**  ON

**DELL**





# Documents Section

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

The screenshot displays the DocMagic eClose Console interface. At the top, the header shows 'DocMagic eClose Console (Settlement Agent)' and the user 'Sally'. Below the header, there are sections for 'LOAN' and 'LENDER' details, a 'COUNTDOWN TO CLOSING' timer, and a 'Signers (2)' table. The 'Documents (15)' section is highlighted with a green border and contains a table of documents to be executed.

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

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



# Documents Section

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

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

- LOAN:** Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER:** Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Signers (2):** A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. A green box highlights this section, showing six documents:

#	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 shows the DocMagic eClose Console interface. The header includes the DocMagic logo, the text "eClose Console (Settlement Agent)", and a user profile for "Sally". The main content area displays a list of 14 documents with columns for document number, name, page count, number of signers, and completion status. A green box highlights the "Print and Sign" section at the bottom, which contains one document: "Multistate Fixed Rate Note" (3/3 pages, 1 signer, completed).

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

© Copyright 2021 DocMagic, Inc. - ALL RIGHTS RESERVED

Home Contact Privacy Policy Terms of Use

DELL



# Adding Documents

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

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

- LOAN** section: Displays loan details such as Loan # (777-1616630796081), Primary Borrower (Erica Sample), Type (EClosing), Package ID (333727), and Worksheet # (1616630796081 (Version: 1)).
- LENDER** section: Displays lender information including Company (DSI TEST LENDER (SALES)), Contact (Michael Morford), Email (mikem@docmagic.com), and Phone ((800) 649-1362).
- COUNTDOWN TO CLOSING** section: Shows a timer for days, hours, minutes, and seconds, with a date of Apr 19, 2023 (Wed) and time of 12:00am PDT.
- Signers (2)** section: A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign options.
- Documents (15)** section: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed status.

A blue arrow points from the text box to a document icon button located in the 'Documents (15)' section header.

#	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@examp	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

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



# Adding Documents

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

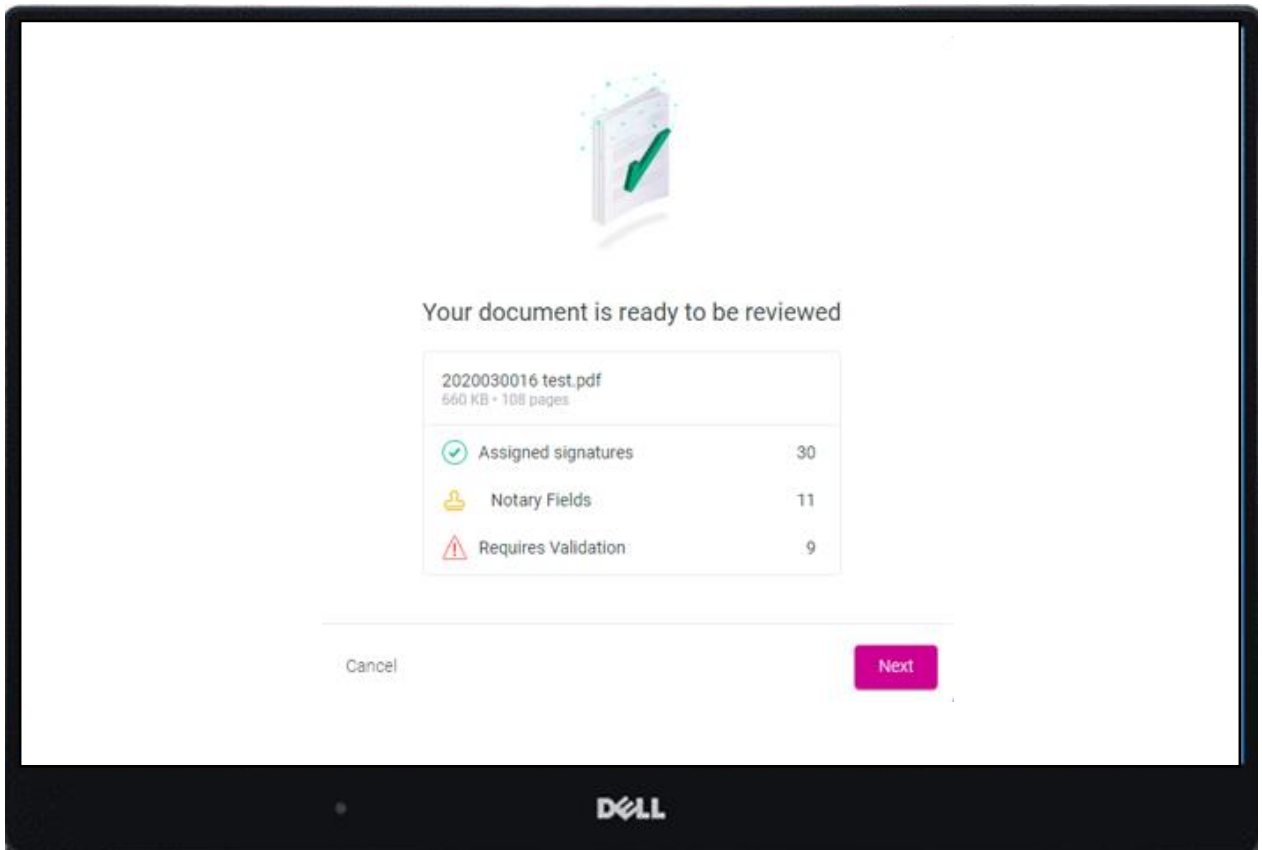
The screenshot displays the DocMagic eClose Console interface. At the top, the user is identified as Sally. The main area is divided into sections for LOAN, LENDER, and a COUNTDOWN TO CLOSING. The LOAN section shows details for Loan # 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, and Worksheet #: 1616630796081 (Version: 1). The LENDER section shows Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, and Phone: (800) 649-1362. The COUNTDOWN TO CLOSING section shows a timer for DAYS, HOURS, MINUTES, and SECONDS, with the date Apr 19, 2023 (Wed) and time 12:00am PDT. A 'Ready to Close' button is visible. Below these sections is a table with columns for 'ID Verify / Status', 'Status', and 'eSign'. A file selection dialog box is open over the table, showing the 'This PC > Desktop' location. The dialog box lists several files, with 'AZACPRS.TTL.pdf' selected. The 'File name' field contains 'AZACPRS.TTL.pdf' and the file type is set to 'All Files (\*.\*)'. A green box highlights the 'Browse' button in the dialog box, and a blue arrow points from the text above to this button. The table below the dialog box shows a list of documents with columns for ID, Status, and eSign status.

ID	Status	eSign
1	Not Started	Open Signing Room
2	Ready to Sign	Open Signing Room
3	Completed	
4	Completed	
5	Completed	
6	Completed	



# AutoPrep

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



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

The screenshot shows a document titled "APPRAISAL DELIVERY WAIVER" with two checkboxes. A dropdown menu is open over the second checkbox, listing signers: "Unassigned", "Sammy Sample Borrower 1", "Sally Sample Borrower 2", "To be determined Notary", "Belinda Helmick Settlement Agent", and "Unspecified Originator". A red callout bubble with a signature icon points to the "Unassigned" option. A green callout bubble with a checkmark and the number "2" points to the "Sally Sample Borrower 2" option. A red callout bubble with a warning triangle and the number "2" points to the "Unassigned" option in the dropdown. Below the dropdown, the text "Borrower SALLY SAMPLE" and "Date" are visible. The Dell logo is at the bottom of the document.

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



# AutoPrep

You have the option to correct the signature mark or choose 'Not needed for this transaction.' This will help the AI compute this accurately next time.

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

State of \_\_\_\_\_  
County of \_\_\_\_\_

Subscribed and sworn to (or affirmed) before me on this \_\_\_\_\_ day of \_\_\_\_\_  
by John Smith

providing to me on the basis of satisfactory evidence to be the person(s) who

Why are you deleting this signature mark?

- Not a signature mark
- Not needed for this transaction

Cancel Delete

DELL





# AutoPrep

The borrower will be highlighted in green

The screenshot displays a DocMagic document titled "2020030016 test.pdf". The document text includes a loan agreement clause and a date: "DATED this 24th day of April, 2020." Below the date, there is a dropdown menu with "Terry M Mackey (Borrower 1)" selected, highlighted in green. Below this, there is a line for "State of \_\_\_\_\_" and "County of \_\_\_\_\_". Further down, the text reads "This instrument was acknowledged before me on \_\_\_\_\_ by Terry M Mackey." Below this, there is a dropdown menu with "Notary" selected, highlighted in blue. Below the notary dropdown, there is a line for "My Commission Expires: \_\_\_\_\_". A blue callout bubble with a pencil icon points to the notary dropdown. A green callout bubble with a pencil icon points to the borrower dropdown. A plus sign in a circle is visible in the bottom right corner of the document area.

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



# AutoPrep

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 located in a community property state as a basis for repayment of the loan.

This is an application for joint credit, Borrower and Co-Borrower each agree that we  do not  do 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: <input type="checkbox"/> VA <input checked="" type="checkbox"/> Conventional <input type="checkbox"/> Other: (explain)		Agency Case Number		Lender Case Number	
<input type="checkbox"/> FHA <input type="checkbox"/> USDA/Rural Housing Service				2020030016	
Amount	Interest Rate	No. of Months	Amortization Type:	<input checked="" type="checkbox"/> Fixed Rate <input type="checkbox"/> Other: (explain):	
\$400,000.00	3.250%	360	<input type="checkbox"/> GPM <input type="checkbox"/> ARM (type):		

#### II. PROPERTY INFORMATION AND PURPOSE OF LOAN

Subject Property Address (street, city, state & ZIP)					No. of Units
1107 Chesterton Drive, Richardson, TX 75080					1
Legal Description of Subject Property (attach description if necessary)					Year Built
					1978
Purpose of Loan <input type="checkbox"/> Purchase <input type="checkbox"/> Construction <input type="checkbox"/> Other: (explain):			Property will be:		
<input checked="" type="checkbox"/> Refinance <input type="checkbox"/> Construction-Permanent			<input checked="" type="checkbox"/> Primary Residence <input type="checkbox"/> Secondary Residence <input type="checkbox"/> Investment		
<i>Complete this line if construction or construction-permanent loan.</i>					
Year Lot Acquired	Original Cost	Amount Existing Liens	(a) Present Value of Lot	(b) Cost of Improvements	Total (a + b)
	\$	\$	\$	\$	\$
<i>Complete this line if this is a refinance loan.</i>					
Year Acquired	Original Cost	Amount Existing Liens	Purpose of Refinance	Describe Improvements <input type="checkbox"/> made <input type="checkbox"/> to be made	
2000	\$240,000.00	\$146,914.00	CASH OUT OTHER	Cost: \$	
Title will be held in what Name(s)			Manner in which Title will be held	Estate will be held in:	

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.

The screenshot displays the DocMagic AutoPrep interface for a document titled "2020030016 test.pdf". The document text includes a legal disclaimer, a date "DATED this 24th day of April, 2020.", and a borrower name "Terry M Mackey (Borrower 1)". A plus sign icon is highlighted in a green box at the bottom right of the document area. On the right side, a toolbox is visible with the following sections:

- Signature Fields**
  - Signature
  - Initial
- Notary Fields**
- PostFill**
  - Textbox
  - Checkbox
  - Date

A "Done" button is located at the top right of the interface.



# AutoPrep

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

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 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: \_\_\_\_\_

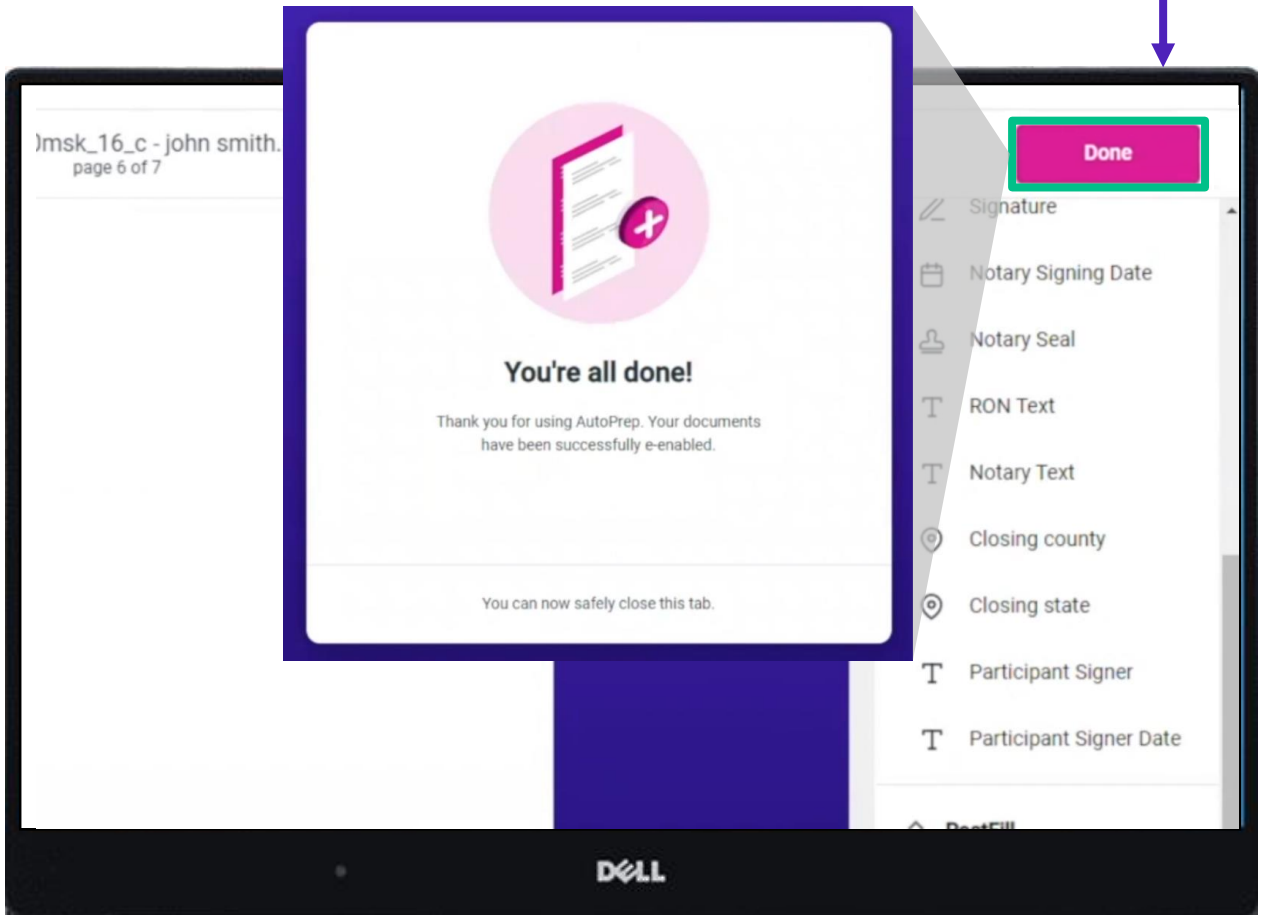
Done

- Signature Fields
  - Signature
  - AA Initial
- Notary Fields
- PostFill
  - Textbox
  - Checkbox
  - Date



# AutoPrep

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



# Settlement Agent Portal – Post AutoPrep

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

The screenshot displays the DocMagic eClose Console (Settlement Agent) interface. The top navigation bar includes the DocMagic logo, the text 'eClose Console (Settlement Agent)', and a user profile for 'Sally'. Below the navigation bar, there are three main sections: 'LOAN' with details like Loan #, Primary Borrower, Type, Package ID, and Worksheet #; 'LENDER' with Company, Contact, Email, and Phone; and 'COUNTDOWN TO CLOSING' with a timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Below these sections are tabs for 'Details', 'eJournal', and 'Action Log', along with a 'Ready to Close' button. The 'Signers (2)' section shows a table with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. The table lists two signers: Erica Sample (Borrower) and Sally Settlement (Settlement Agent). Below the signers section is the 'Documents (15)' section, which is highlighted with a green box. It shows a table with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. The table lists six documents: 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 'Preview Mode' is set to 'ON'.

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

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

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.*

**DocMagic eClosing Console (Settlement Agent)**

**LOAN** Loan #: 16364816201  
Primary Borrower: John Smith  
Type: eClosing  
Package ID: 417659  
Worksheet #: 16364816201

**LENDER** Company: SAMPLE SONS L...  
Contact: Michael Morford  
Email: mikem@docmagic.com  
Phone: (555) 555-5555

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: strull@docmagic.com  
Phone: (987) 555-4321

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

**Signers (3)**

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

**Documents (6)** [Pencil Icon] [Print Icon] [Share Icon]

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	✓	

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

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

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

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

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

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

John Smith  
Borrower: JOHN SMITH Date: Borrower: Date

Previous Page Next Page

**Tags**

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



# eJournal

Click on this tab to access the eJournal.

The screenshot displays the DocMagic eClose Console interface. At the top, there are tabs for 'Details', 'eJournal', and 'Action Log'. The 'eJournal' tab is highlighted with a green box. Below the tabs, there are sections for 'LOAN', 'LENDER', 'SETTLEMENT AGENT', and 'COUNTDOWN TO CLOSING'. The 'LOAN' section shows details for Loan # 163648191601, Primary Borrower John Smith, Type EClosing, Package ID 417659, and Worksheet # 163648191601 (...). The 'LENDER' section shows Company SAMPLE SONS L..., Contact Michael Morford, Email mikem@docmagic..., and Phone (555) 555-5555. The 'SETTLEMENT AGENT' section shows Company Settlement Closing..., Contact Sally Settlement, Email struitt@docmagic.c..., and Phone (987) 555-4321. The 'COUNTDOWN TO CLOSING' section shows a timer for Days, Hours, Minutes, and Seconds, with a date of Apr 19, 2023 (Wed) and time of 12:00am PDT. Below these sections, there is a 'Journal' table with columns for '#', 'Signer', and 'Notarization Date and Time'. The first entry is for John Smith on November 9, 2021 at 10:32am PST. A green box highlights a down arrow icon next to this entry. Below the 'Journal' table is a 'Recordings' table with columns for '#', 'File', and 'Date Recorded'. The first entry is for file 417659\_2021-11-09T18:27:54.132Z.mp4 on November 9, 2021 at 10:27am PST. A download icon is visible next to this entry. The Dell logo is visible at the bottom of the screen.

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.

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

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

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

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

Details eJournal **Action Log**

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

[Add Internal Note To Action Log](#)

DELL

You may also add notes at the bottom.



# Print Options

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

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

- LOAN**: Loan #: 777-16166307990, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER**: Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING**: A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Signers (2)**: A table listing signers with columns for #, Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15)**: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are listed, including 'Uniform Residential Loan Application', 'MERS California Deed of Trust', and 'Borrower Consent to the Use of Tax Return Information'.

A green box highlights the printer icon in the document toolbar, and a blue arrow points from the explanatory text above to this icon. Another blue arrow points from the printer icon to the explanatory text below.

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



# Wet-sign Options

Upload signed and scanned documents here.

The screenshot displays the DocMagic eClose Console interface. On the left, the 'Documents (15)' section lists several documents, with the 'Upload' icon highlighted in a green box. A red-bordered callout box contains the following text:

**IMPORTANT**

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

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

**INSTRUCTIONS**

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

At the bottom of the callout, a QR code is shown with the text '75605744-1' below it. A green box highlights the QR code, and a blue arrow points from the 'Upload' icon in the interface to the QR code.

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



# Wet-sign Options

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

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent named Sally. The main content area shows a list of 14 documents, each with a number, title, page count, and number of signers. A green checkmark is visible in the 'Completed' column for document 11, 'Initial Amortization Schedule'. A blue arrow points from the text box above to this checkmark. Below the main list, a summary table is highlighted with a green border, showing a total of 1 document to be printed and signed, with 3 pages and 1 signer. This summary row also has a green checkmark in the 'Completed' column.

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



# 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, allowing a user to assign a notary to a loan. The modal includes the following sections:

- Notary Provider:** A dropdown menu with "Select" as the current option.
- Notary Type:** Radio buttons for "In Person" and "Remote Online Notary (RON)".
- Signers:** A table listing the signers for the loan.
- Request Summary:** A summary of the closing request, including the closing date and time.

Buttons for "Cancel" and "Assign Notary" are located at the bottom of the modal. A blue arrow points from the text above to the "Assign Notary" button in the background interface.

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



# Assign a Notary

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

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

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

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

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



# Assign a Notary

Set the closing date and time.

DocMagic eClose Console (Settlement Agent) Sally

**Assign / Notify Notary**

**\*Notary Provider**  
WVN

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

**Signers**

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

**Request Summary**

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

\*Estimate Closing Date: 2/14/2023 \*Time: 12:00 AM America/Los Angeles

Cancel Assign Notary

Click "Assign Notary" when done.



# Assign a Notary

If your Notary Provider is NotaryCam or DocMagic RON, choose Remote Online Notary for Notary Type.

The screenshot displays the DocMagic eClose Console interface. A modal window titled "Assign / Notify Notary" is open, showing the configuration for assigning a notary. The "Notary Provider" is set to "NotaryCam". The "Notary Type" dropdown is highlighted with a green box, showing "Remote Online Notary" selected. The "Signers" table lists two signers: Erica Sample (Borrower) and Sally Settlement. The "Request Summary" shows 1 participant for a RON eClosing for a property in Torrance, CA, with an estimated closing date of 3/25/2021 at 12:00 AM in the America/Los Angeles time zone. The "Assign Notary" button is highlighted in blue.

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

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





# Assign a Notary

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

The screenshot displays the 'Assign / Notify Notary' modal in the DocMagic eClose Console. The modal is titled 'Assign / Notify Notary' and features a close button (X) in the top right corner. It is divided into several sections:

- Notary Provider:** A dropdown menu with 'NotaryCam' selected.
- Notary Type:** Radio buttons for 'In Person' and 'Remote Online Notary' (selected).
- Signers:** A table listing signers with columns for Name, Email, Role, and Phone.
- Request Summary:** A section containing a summary of the request and fields for 'Estimate Closing Date' (3/25/2021), 'Time' (12:00 AM), and 'America/Los Angeles'.
- Buttons:** 'Cancel' and 'Assign Notary' buttons at the bottom.

The background shows the 'eClose Console (Settlement Agent)' interface with a user profile 'Sally' in the top right. The left sidebar includes 'LOAN' details and a list of 'Documents (16)'. The right sidebar shows 'READY TO CLOSING' options and a table of 'Signer(s)' and 'Completed' status.

Click "Assign Notary" when done.



# Assign a Notary

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

**Assign / Notify Notary**

**\*Notary Provider**  
DocMagic RON

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

**Search**

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

City:  County:  State: MD Zip:   RON Capable

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

**Request Summary**

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

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

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.



# 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** *\*Required*  
 In Person  
 Remote Online Notary (RON)

**Search**

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

RON Capable

**Signers**      **Notaries**

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

**Request Summary**

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

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

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

**Search**

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

RON Capable

**Signers**      **Notaries**

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

**Request Summary**

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

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

Click "Request Notary Services" when done.



# Ready to Close

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

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text "eClose Console (Settlement Agent)", and a user profile for "Sally".

The main content area is divided into several sections:

- LOAN:** 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:** Shows a timer for DAYS, HOURS, MINUTES, and SECONDS. The current date is Apr 19, 2023 (Wed) and the time is 12:00am PDT.
- Buttons:** Includes "Details", "eJournal", "Action Log", and a highlighted "Ready to Close" button with a bell icon.

Below these sections is the "Signers (2)" section, which includes a "NotaryCam" and "Notify" button. A table lists the signers:

#	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

Below the signers is the "Documents (16)" section, which includes a "Preview Mode" toggle set to "ON". A table lists the documents:

#	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: Remote Online Notary will be covered in a later section.



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

- LOAN**: Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER**: Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING**: A digital clock showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Signers (2)**: A table listing two signers: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- 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.

A callout box from the text above points to a 'Preview Mode' toggle switch located at the bottom right of the interface, which is currently set to 'off'.

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

#	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	✓

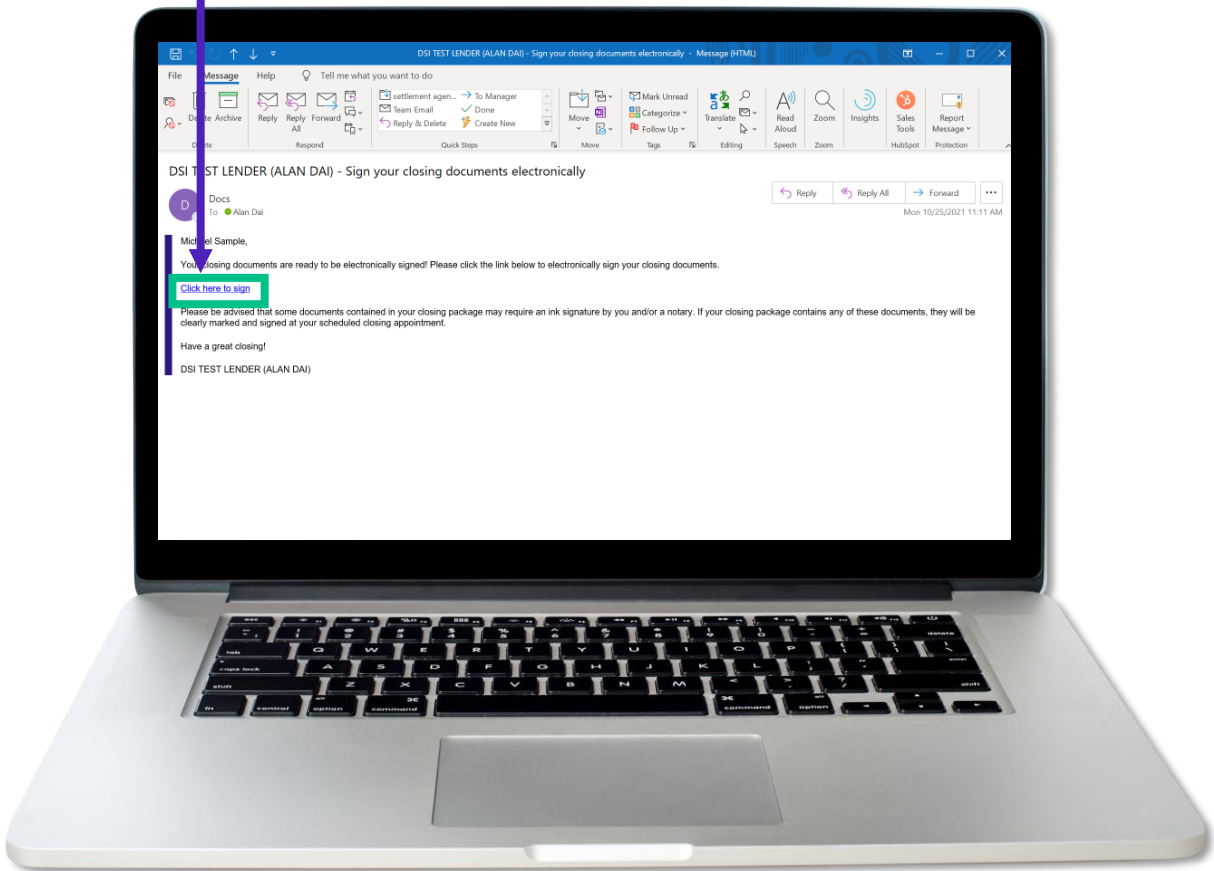




V3 Signing (Borrower's Experience)

# 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.





## Logging In - Verification

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

I have read & agree to the [eSign Disclosure and consent](#) in its entirety.

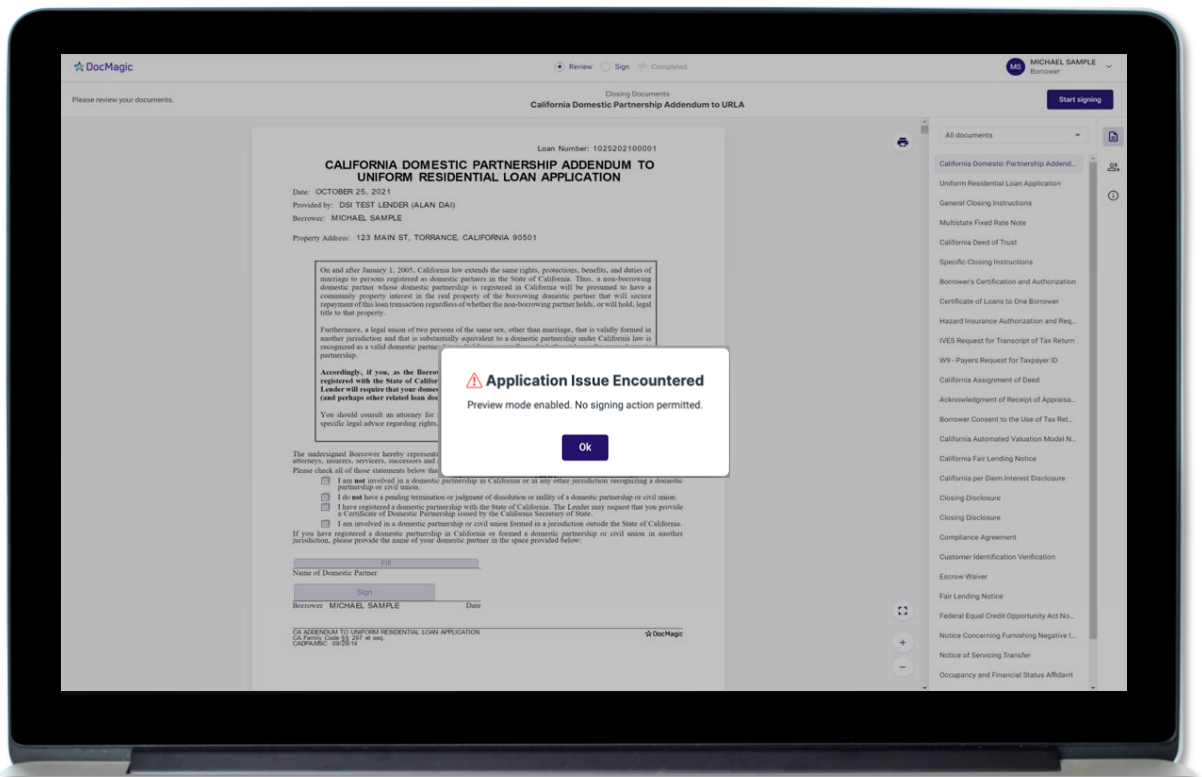
Get Started

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.

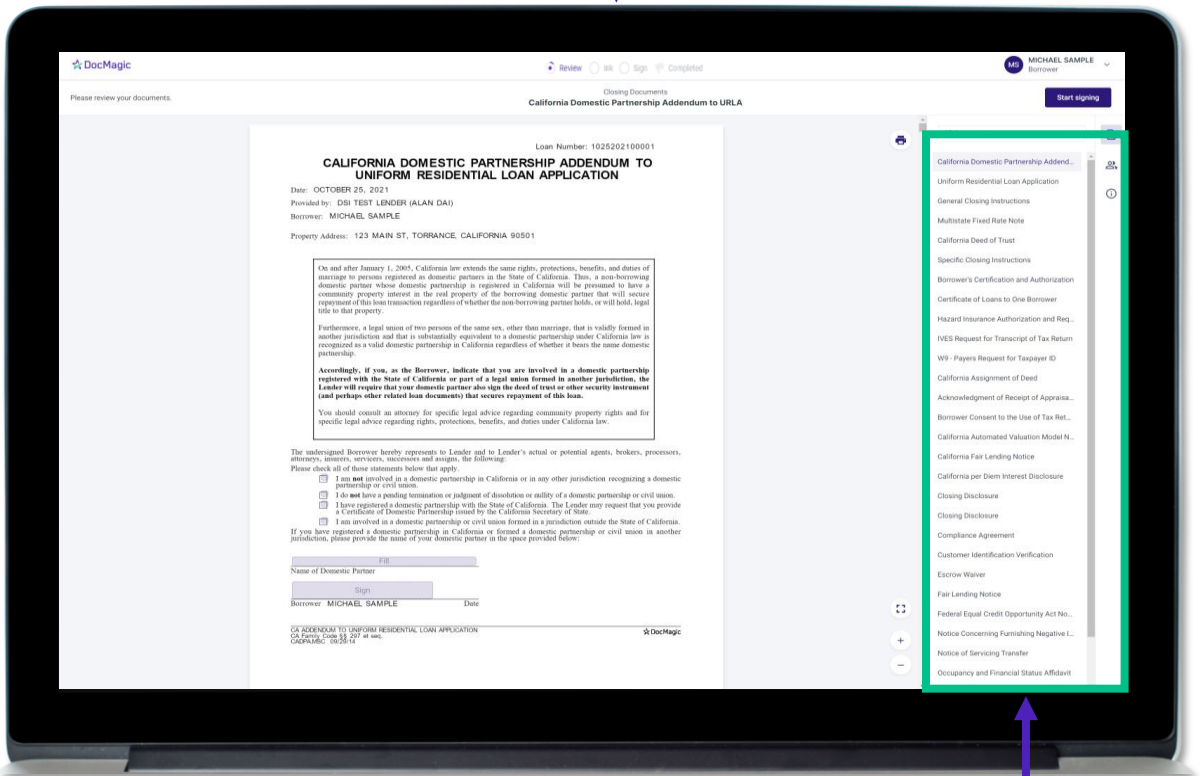


If repeated technical glitches occur, try clearing browser cache or running the experience in an incognito window.



# Page Features

Along the top, you will find indicators that show progress of the Review, Ink-sign, and eSign processes

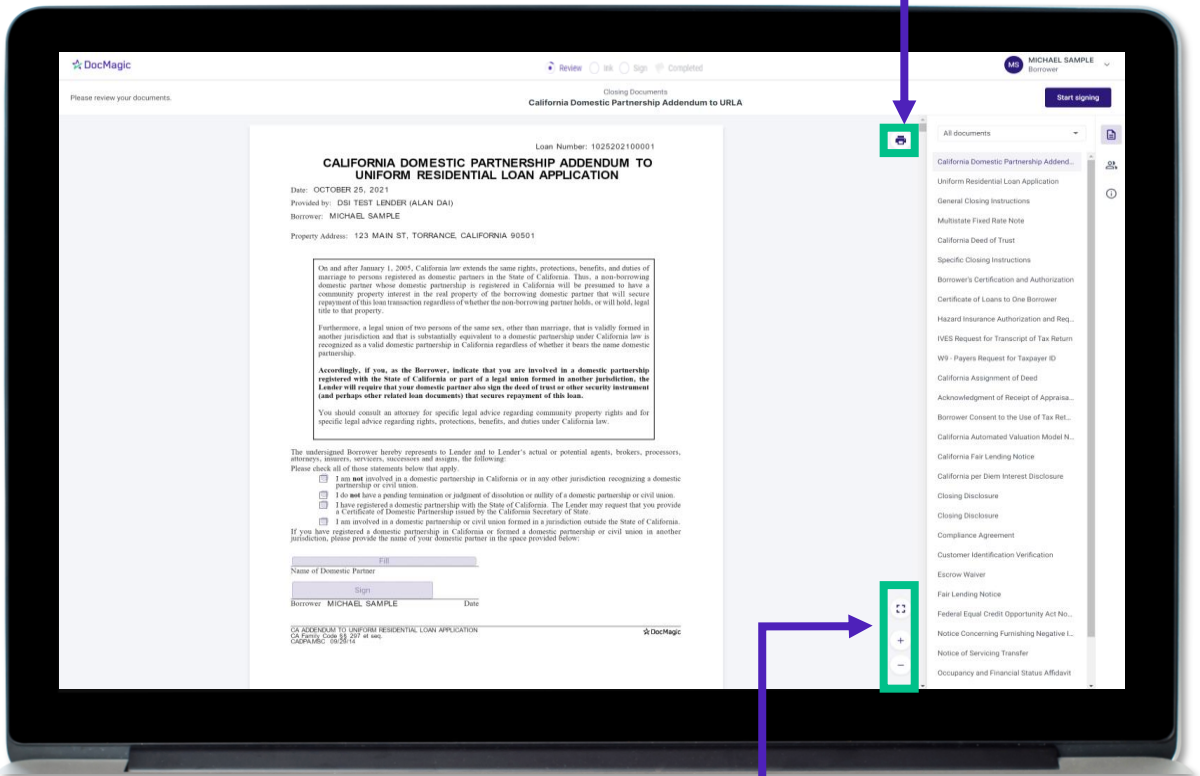


All documents are listed in this column on the right.



# Page Features

The print icon allows you to print the documents.

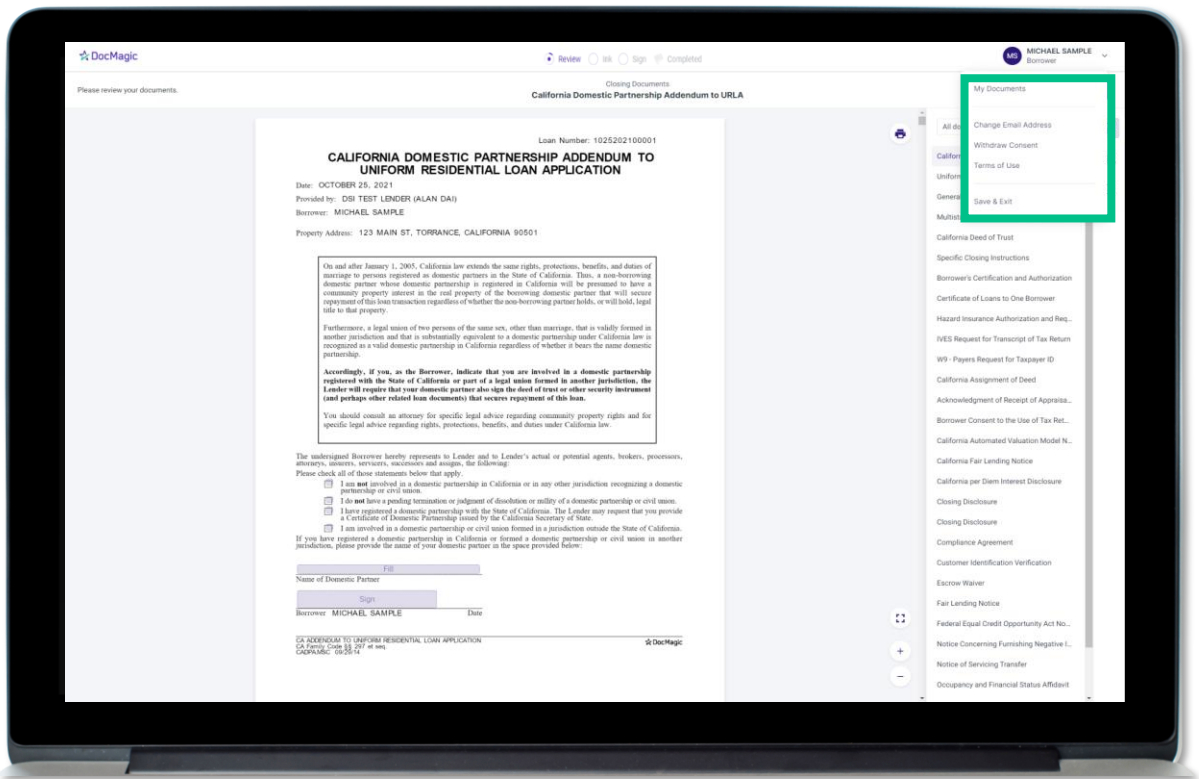


You can expand the signing window and increase or decrease the zoom levels.

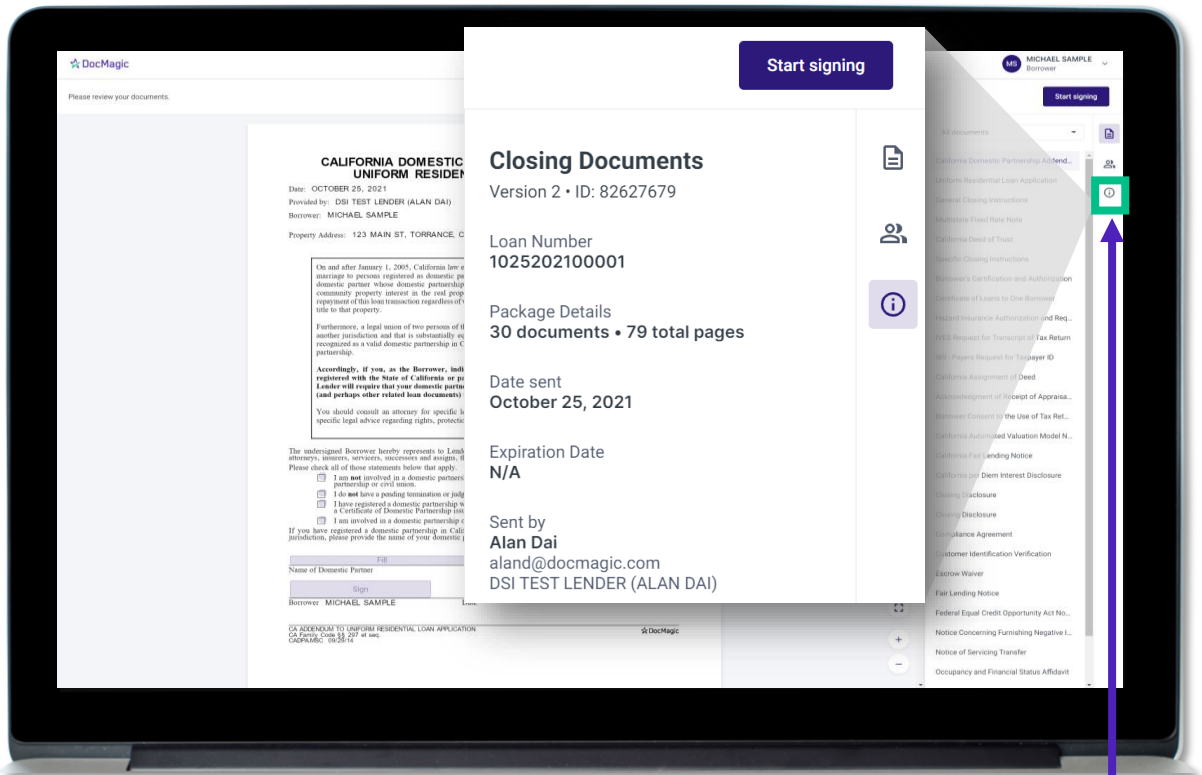


# Borrower Information

The borrower's information can be viewed and edited here.



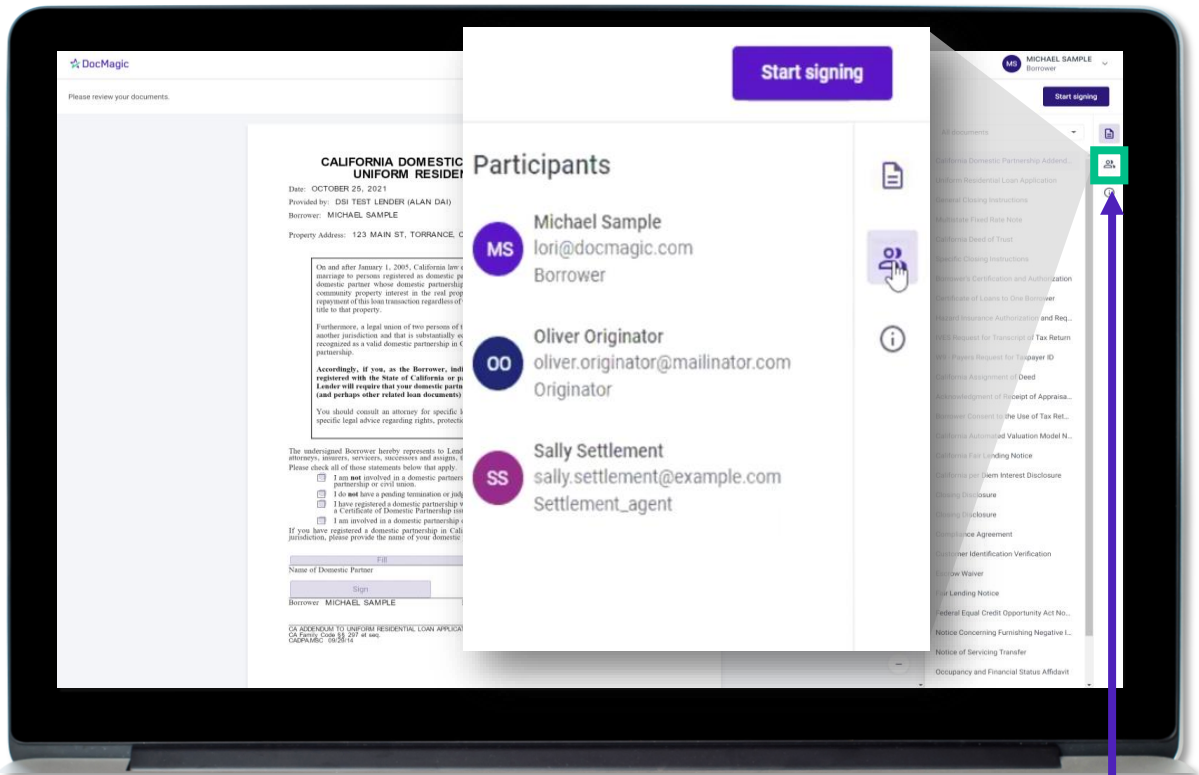
# Document Information



This button lists the document information.



# Participants

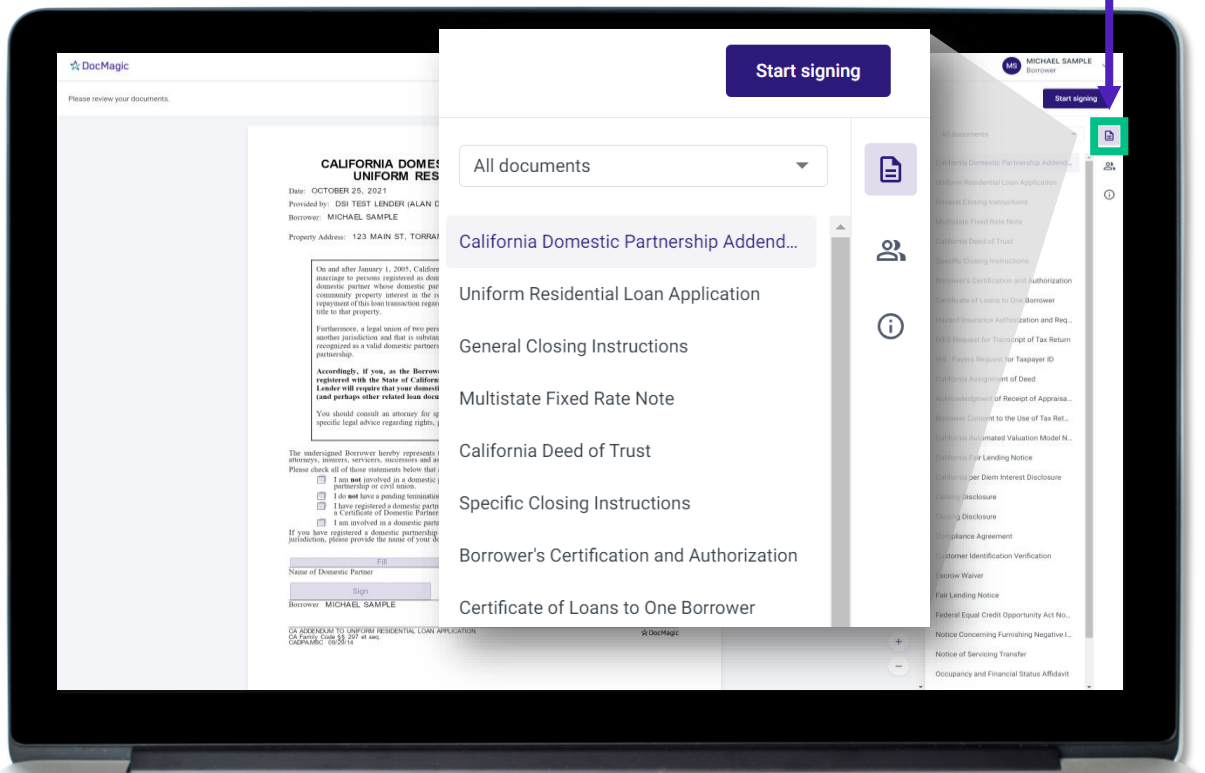


This button lists the participants.



# Return to Documents List

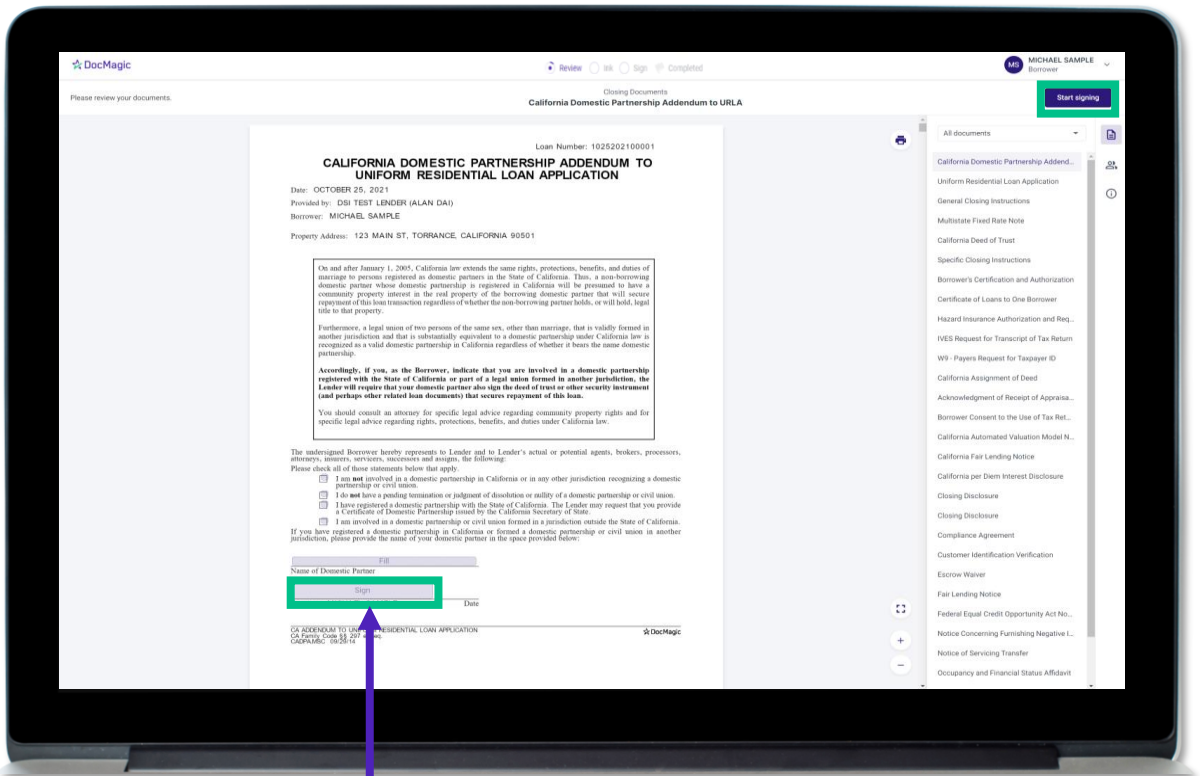
This button brings you back to the list of documents.





# 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 unclickable.

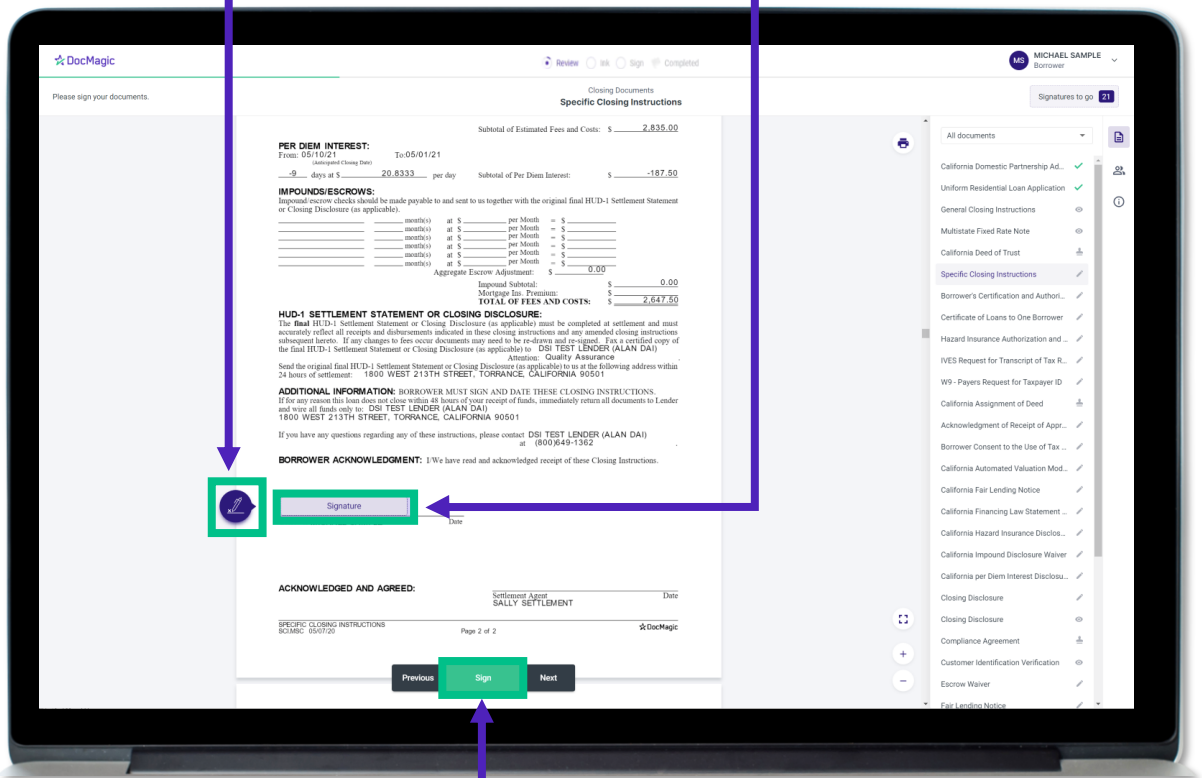


# Begin Click-Signing

You have three options for click-signing.

1. Clicking the pen icon.

2. Clicking on the signature box directly.

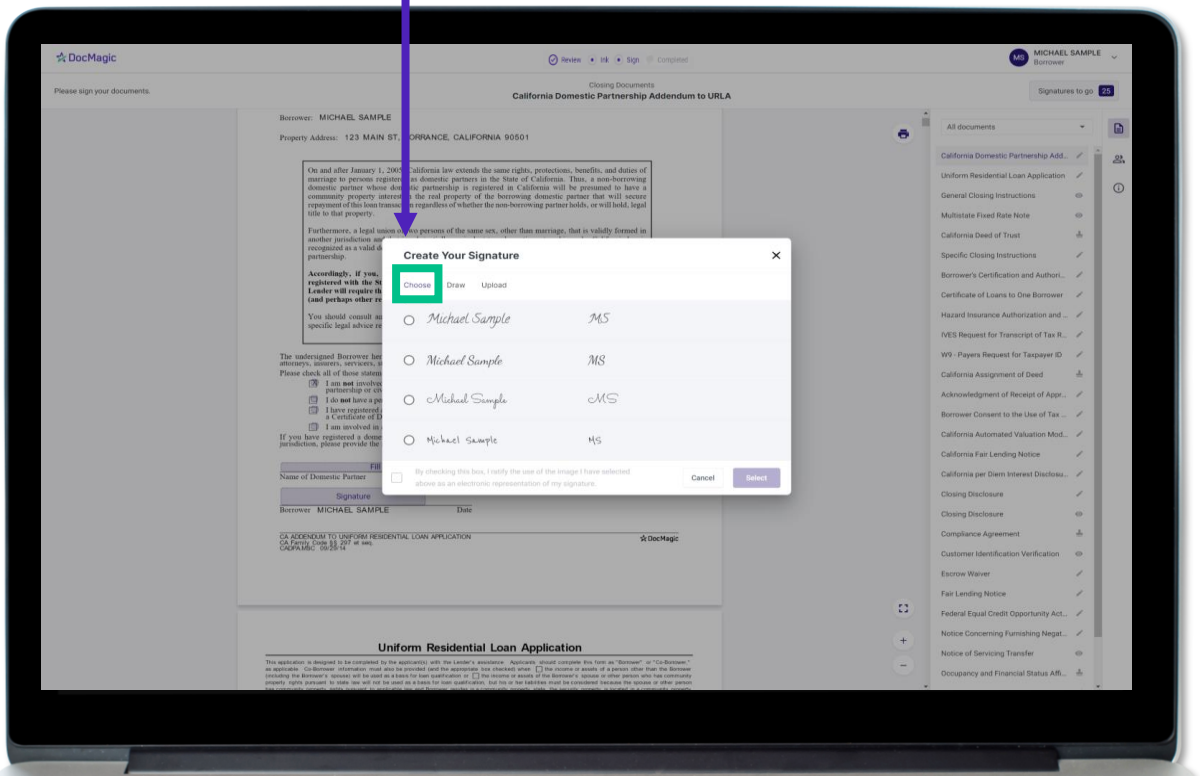


3. Clicking on the Green Sign box which will automatically advance to the next task each time.



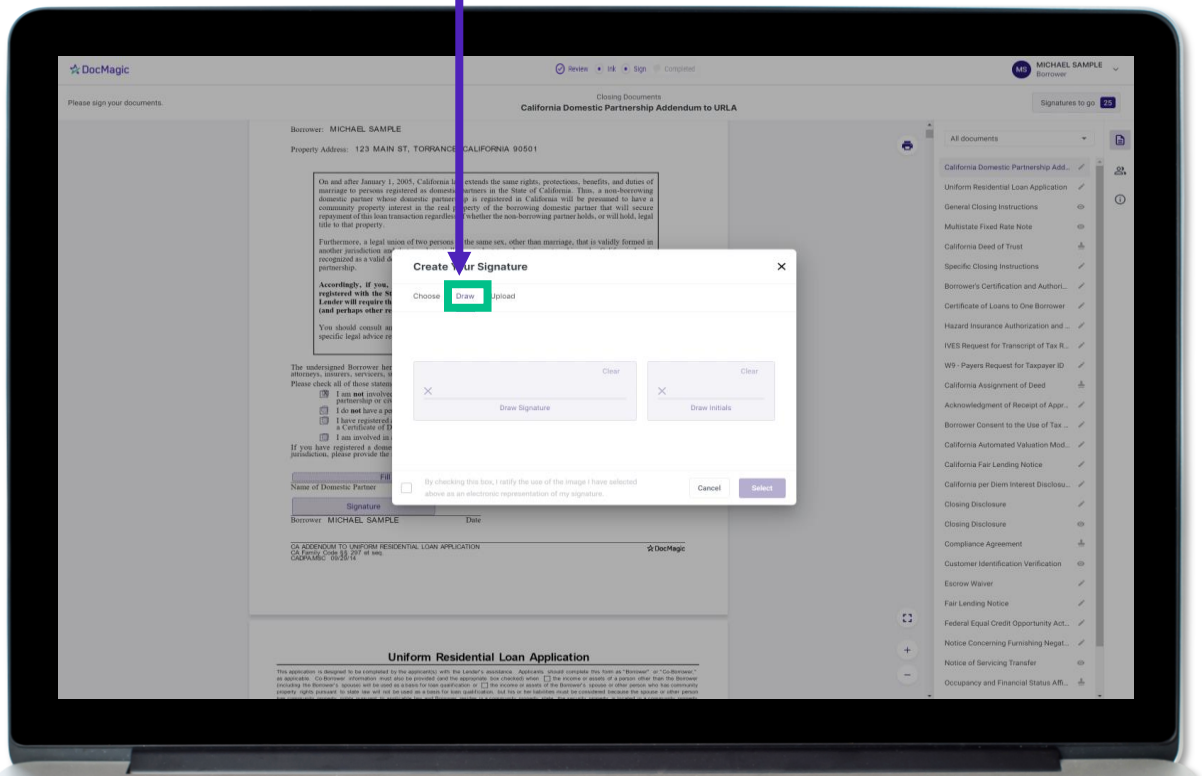
# Signature Options

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



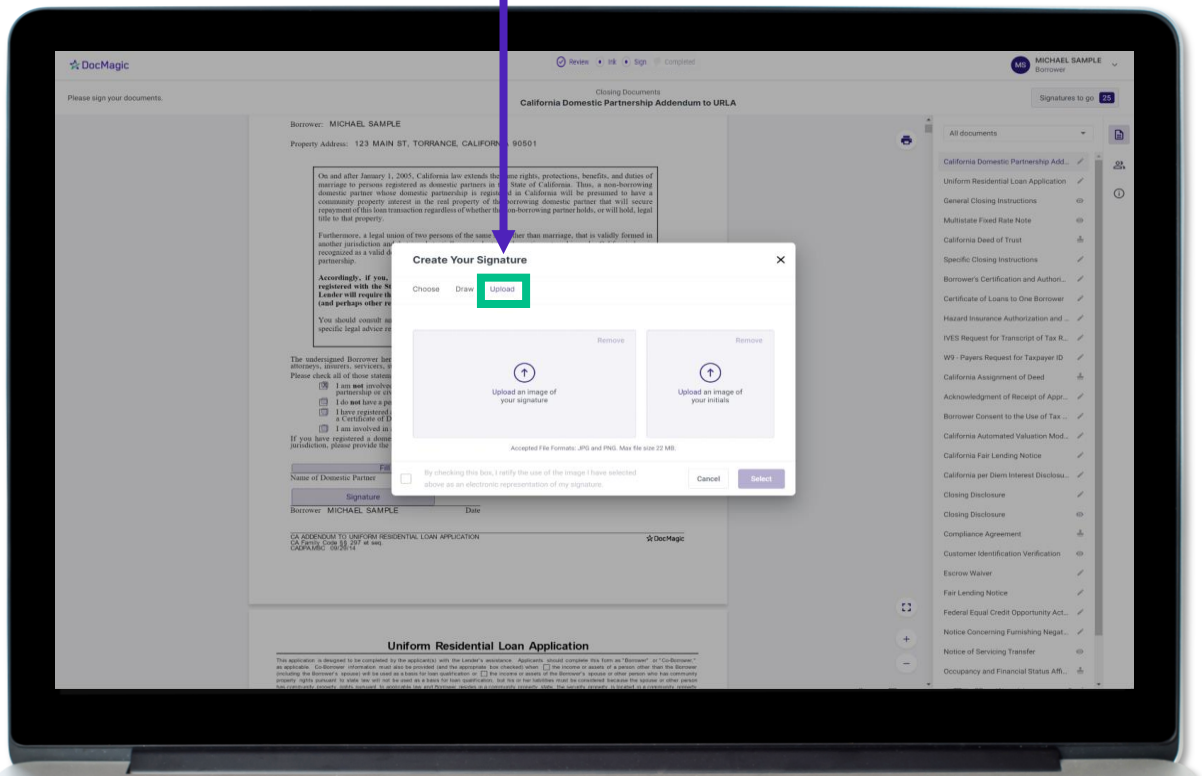
# Signature Options

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



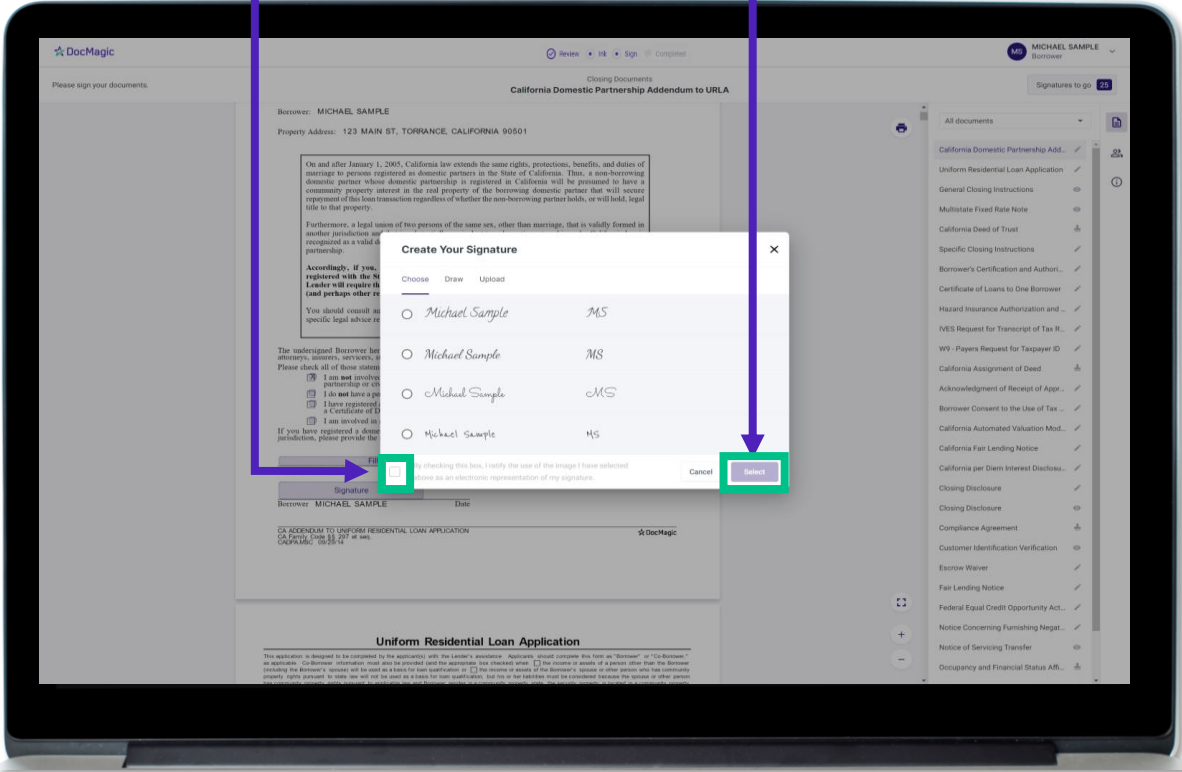
# Signature Options

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



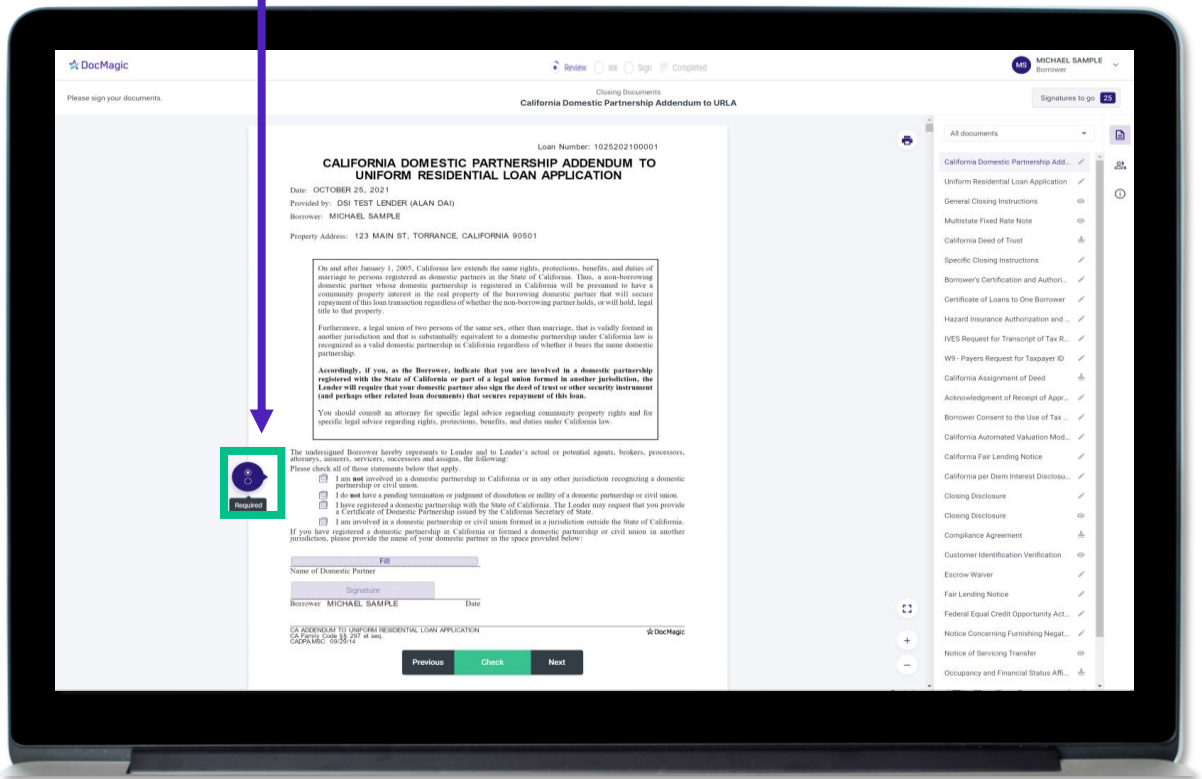
# Signature Options

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



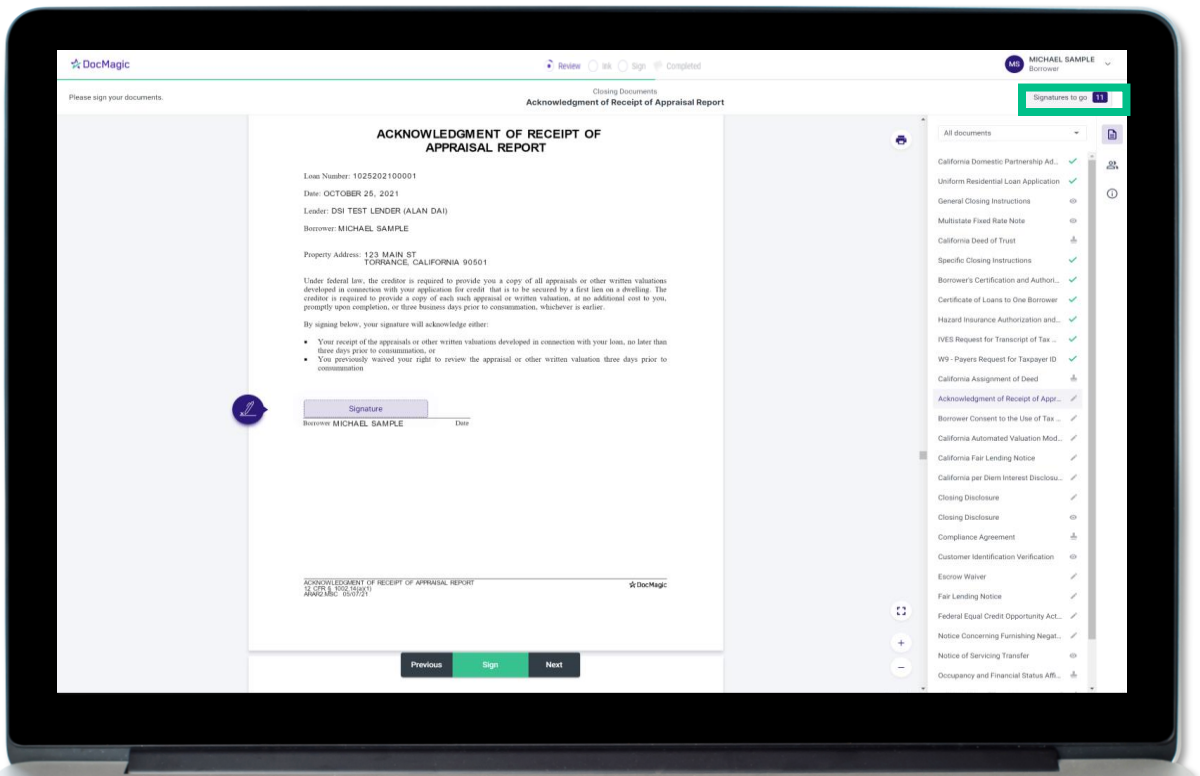
# Check Boxes Required

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

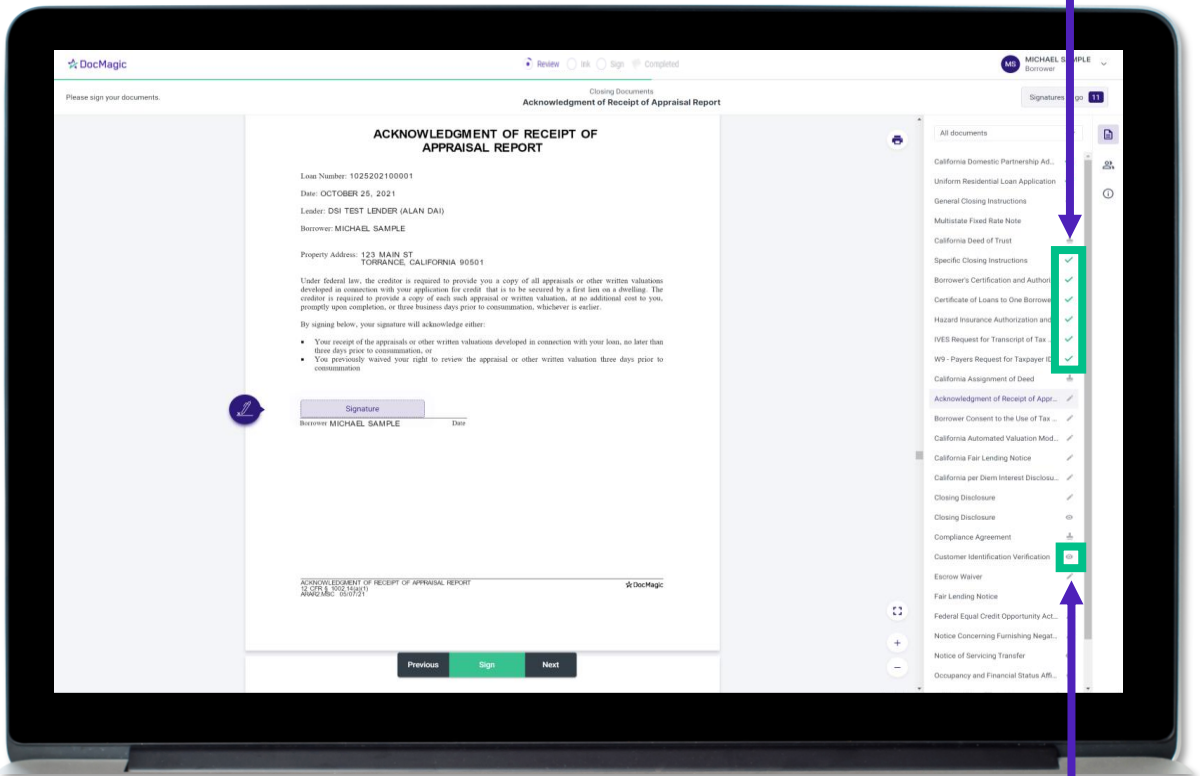
This countdown feature allows you to see how many signatures remain.





# Keeping Track of Your Progress

You can also check the signed status of each document via these green check marks.

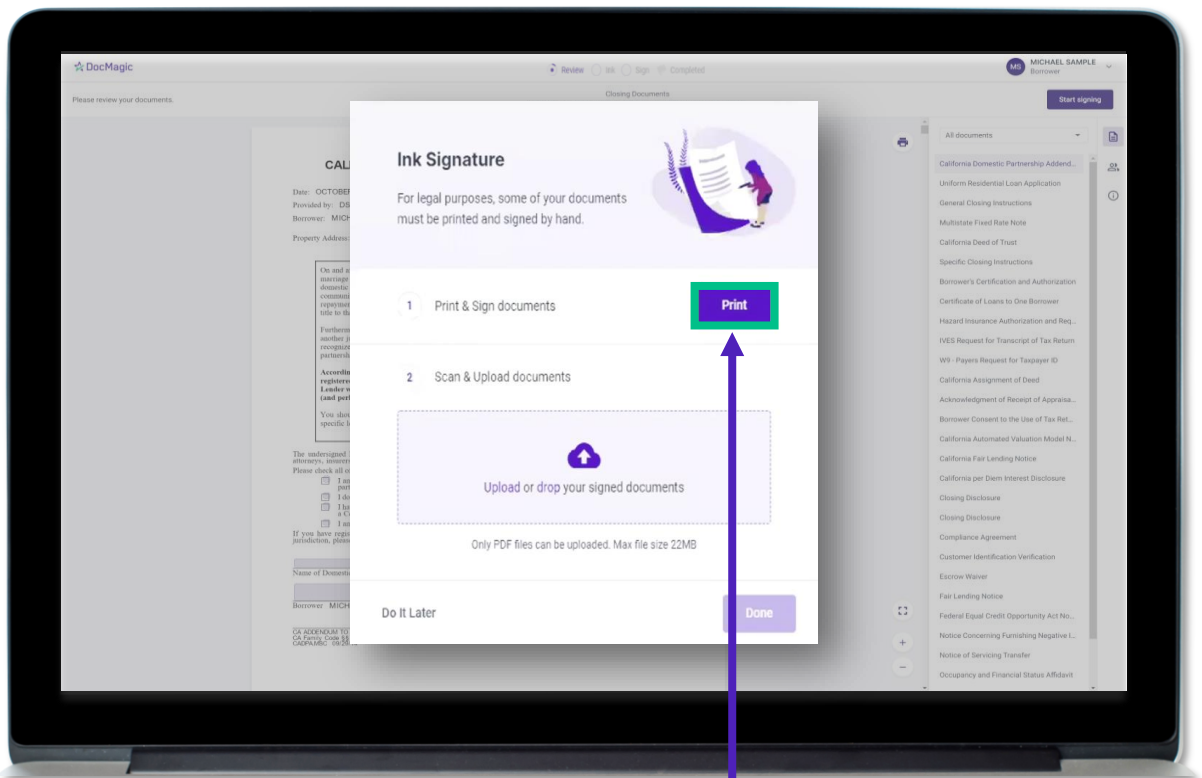


The eyeball icon indicates this is a document that does not require a signature.



# 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.

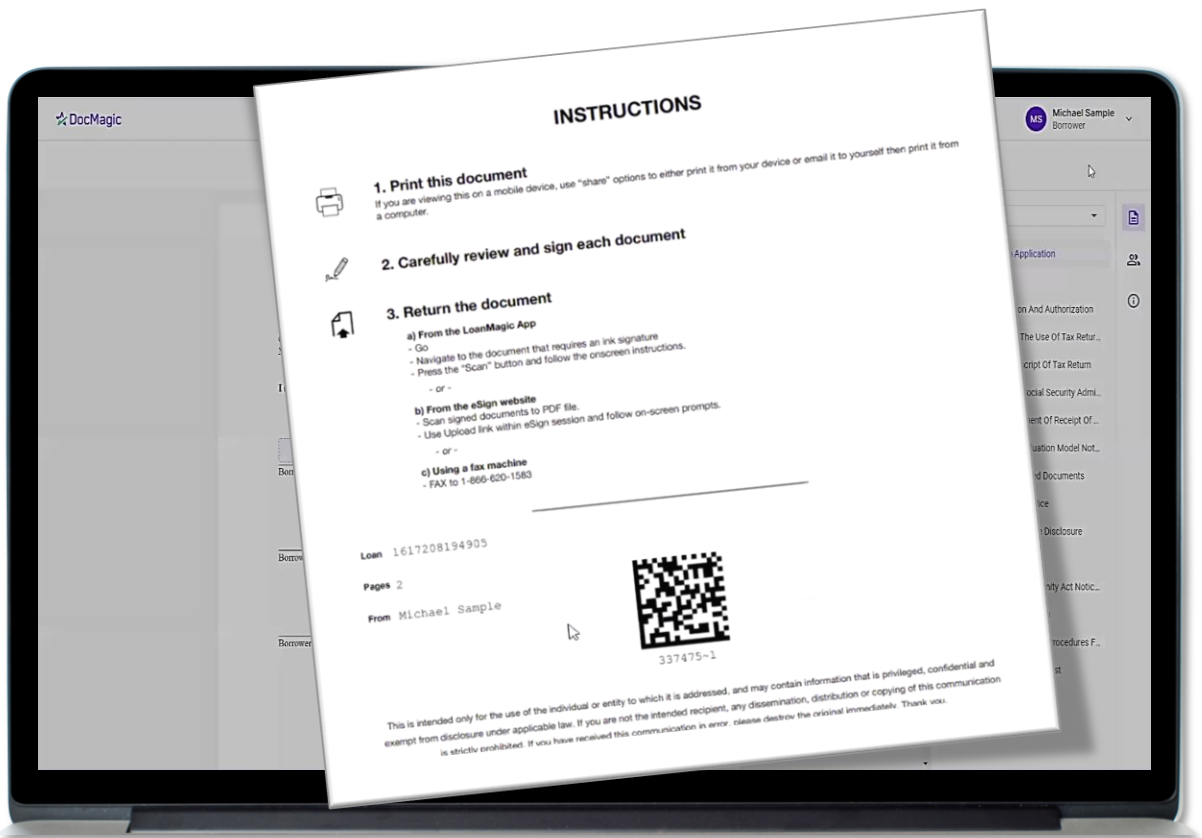


Click "Print" to start the ink-signing process.



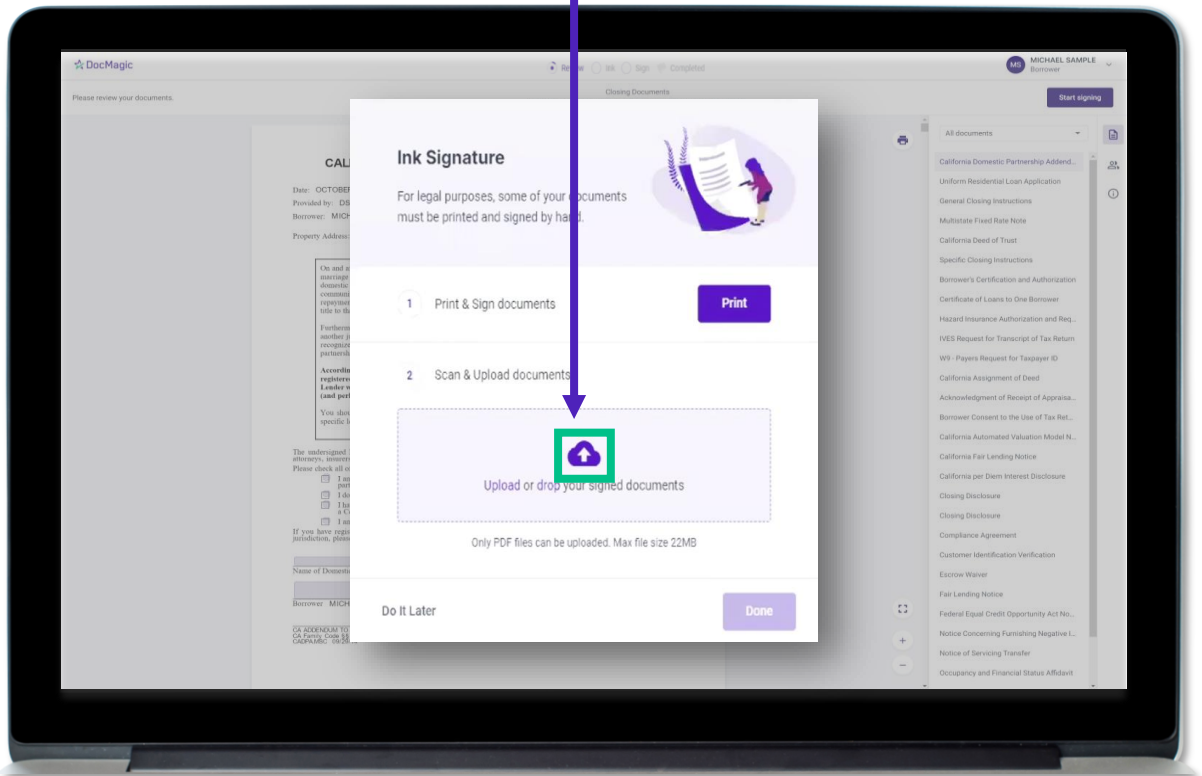
# Ink Signing: Download and Print

Once you click "Print" and start the process, you will receive instructions on how to sign.



# Ink Signing: Uploading

After you have ink-signed the appropriate documents, and scanned them back into the computer, click here to upload them.



# Ink Signing: Uploading

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.

The image shows a laptop screen displaying the DocMagic interface. The interface includes a 'Closing Documents' section with a 'Print' button and a 'Done' button. A list of documents is visible on the right side of the screen. Overlaid on the screen is a printed document with the following content:

**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 on-screen 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 1-888-800-1583

Loan: 777435612  
Pages: 25  
From: STEVE SAMPLE

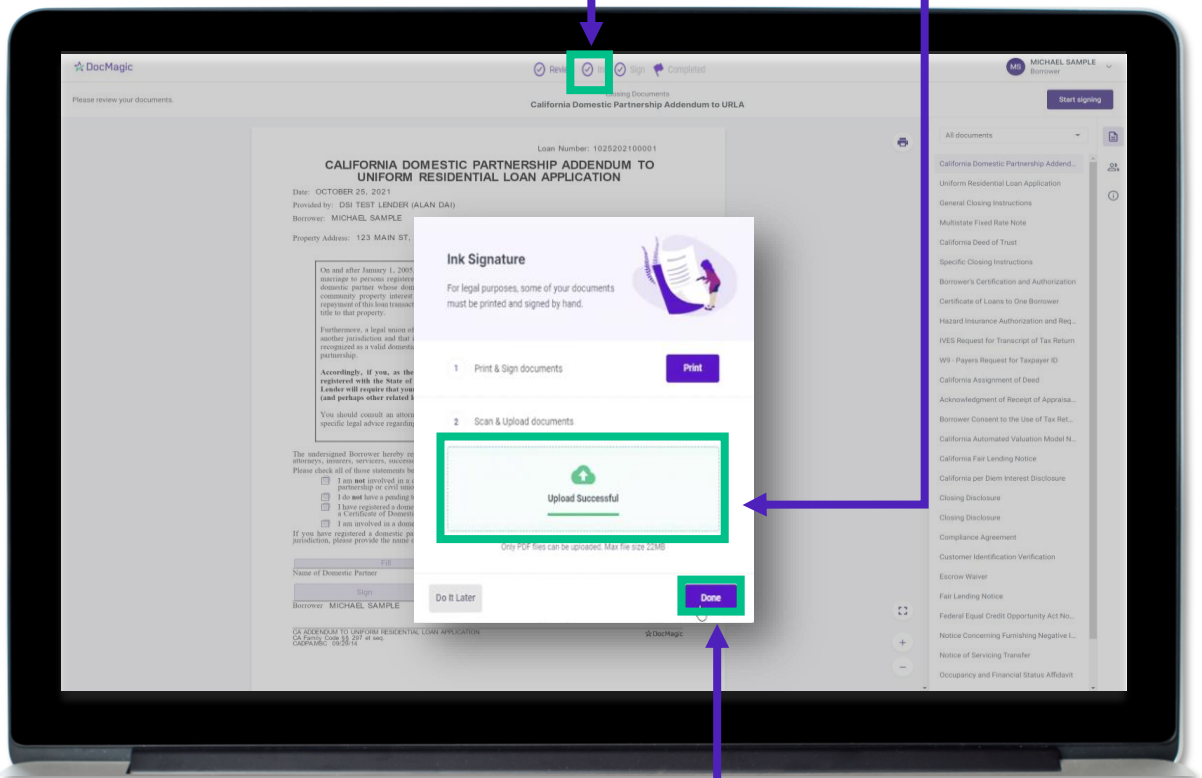
A QR code is located at the bottom of the document, with a blue arrow pointing to it from the text box above.



# Ink Signing: Verification

Once uploaded, the Ink circle is checked.

You will also see "Upload Successful".



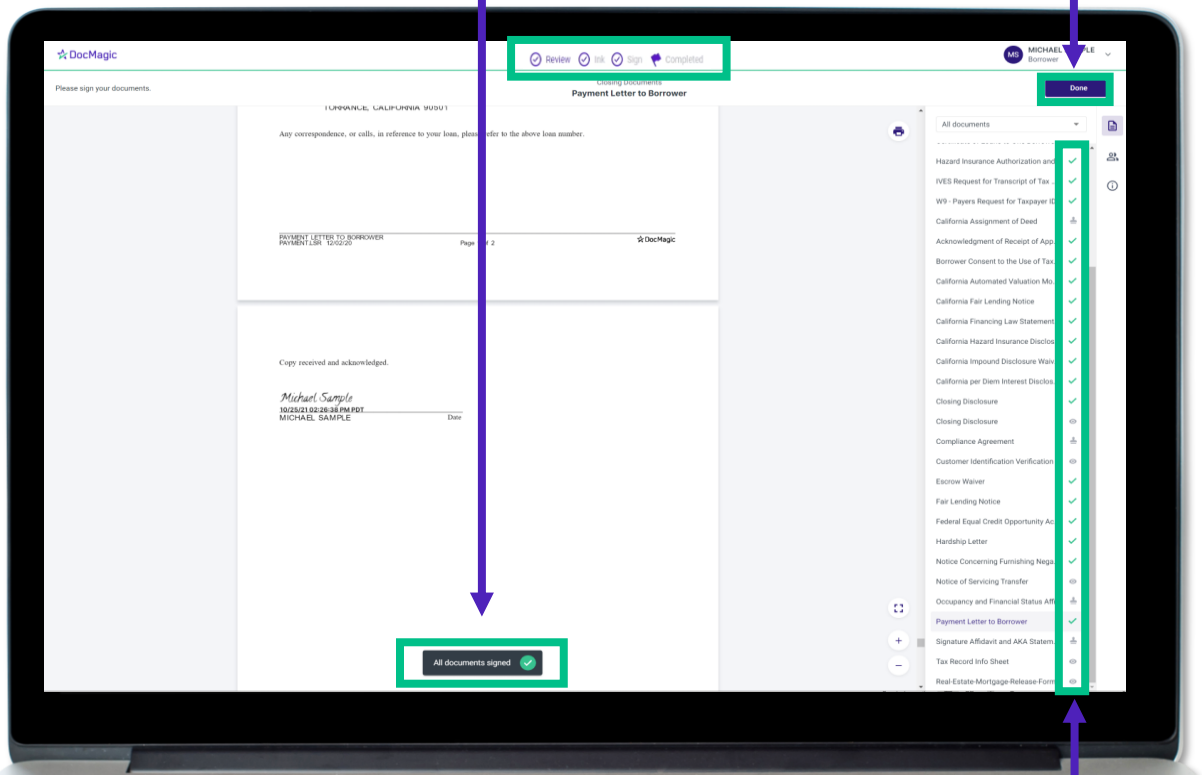
Click "Done" to complete the ink signing process, return to the stack, and click-sign the remaining documents.



# When Complete

These icons will indicate when all signatures are collected.

Click done to complete the process.

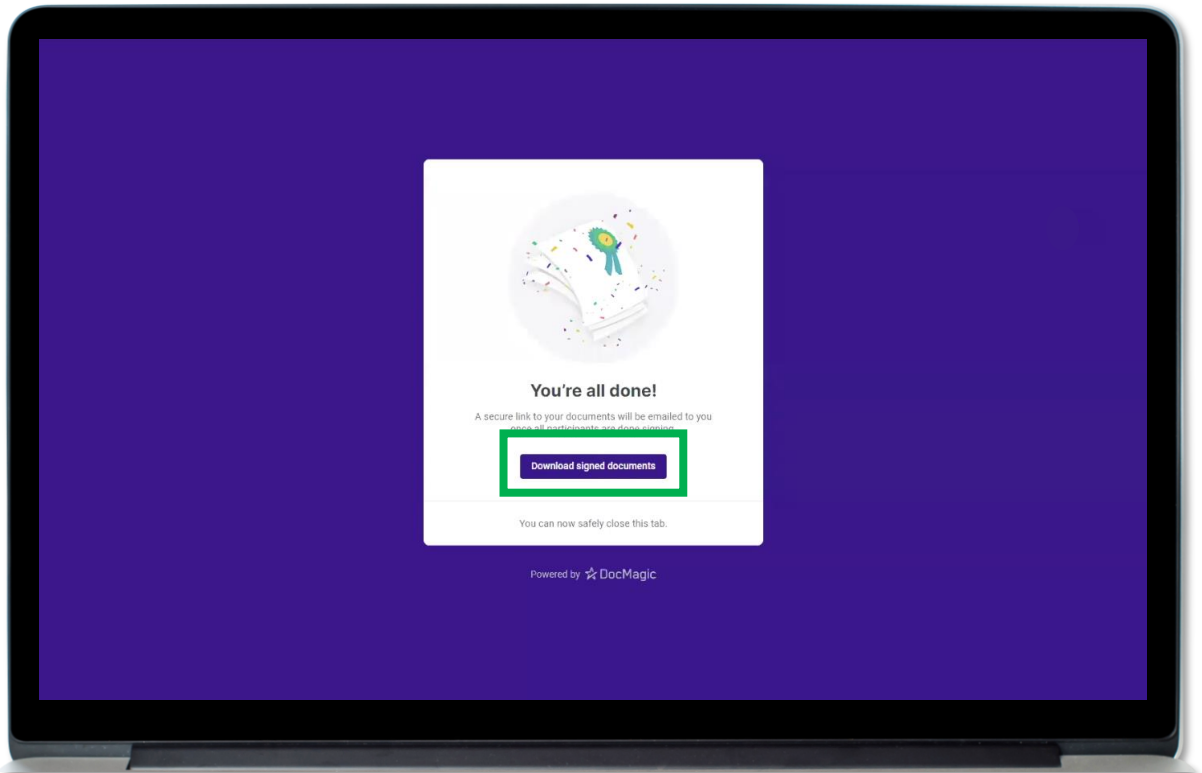


All applicable checkmarks will be green.



## When Complete

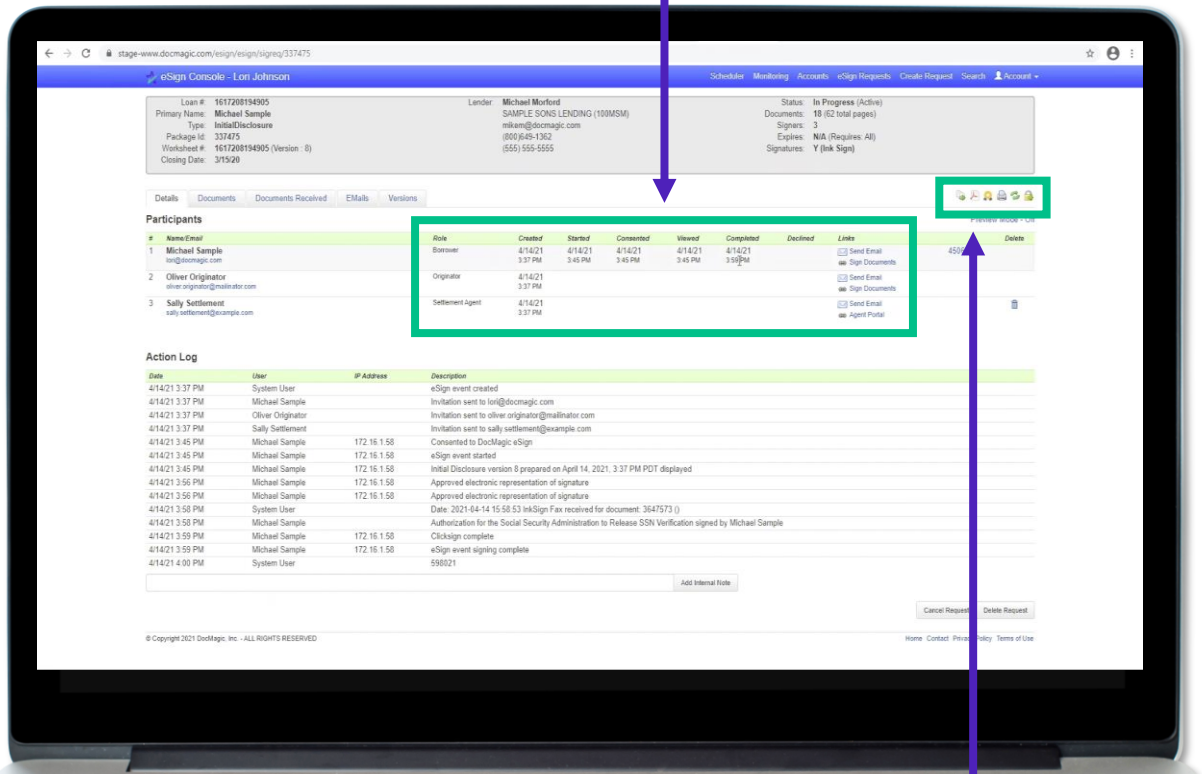
You will get this pop-up which also allows you to download the completed documents.





# 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.

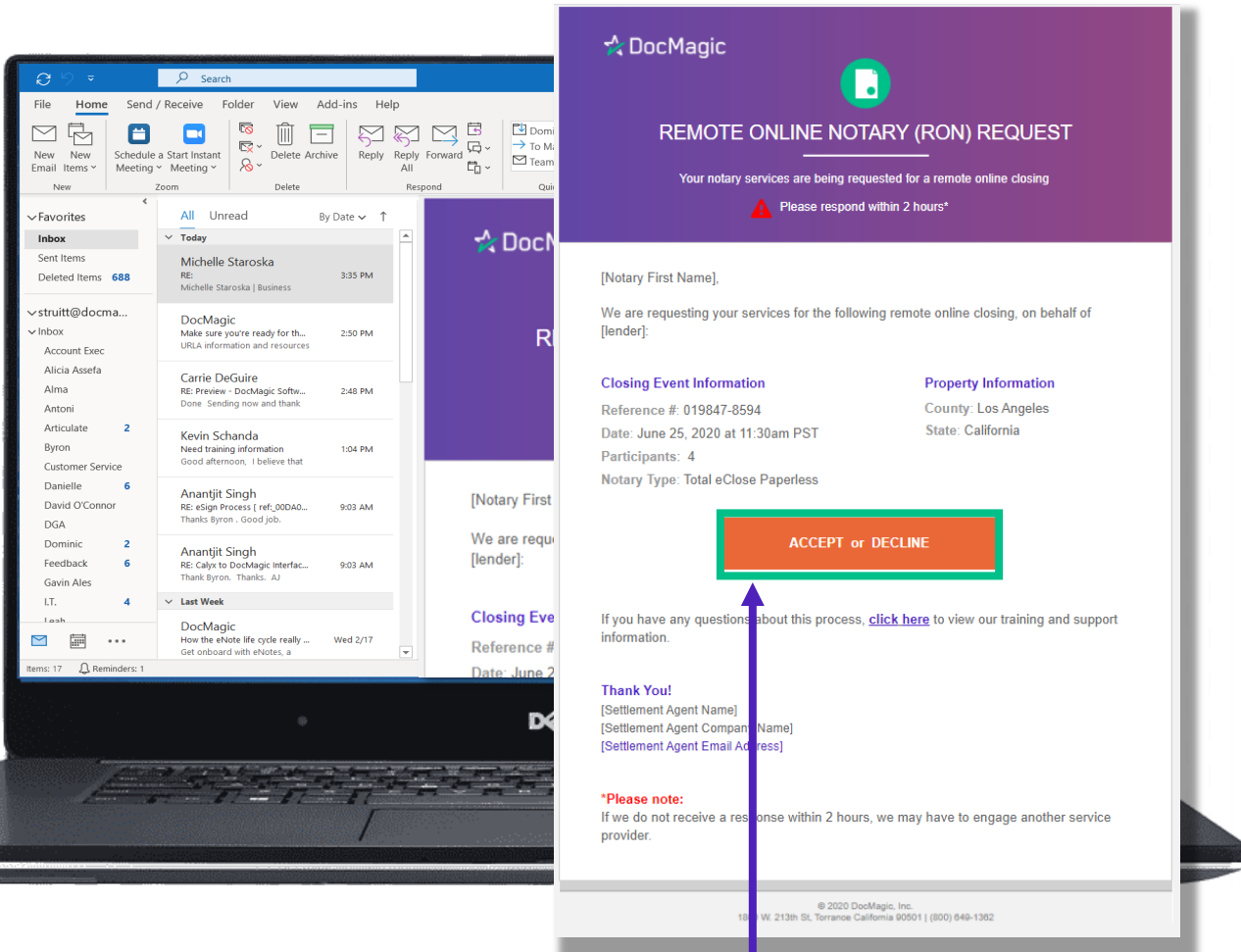




Total eClose (Notary Experience)

# Remote Online Notary Request

The process starts when the Notary receives a request for remote Notary services from the Settlement Agent.



The email includes the option to accept or decline the request.



# Access to the eClose Console

Once the notary accepts the request, they will be provided secure access to the eClose console.

**DocMagic**

**REMOTE ONLINE NOTARY (RON)**

Congratulations!

[Notary First Name],

Thank you for accepting our request to provide eNotary services for the following remote online closing:

<b>Closing Event Information</b>	<b>Property Information</b>
Reference #: 010847-8504	Address: 321 Western Way
Date: June 25, 2020 at 11:30am PST	City, State: Torrance, CA.
Participants: 4	Zip Code: 90501
Notary Type: Total eClose Paperless	

**Lender Information**

Company Name: Bank of America  
Contact: Peggy Lender  
Other Info: ?

To access your eClose console for this transaction, please [Click here](#)

**\*Please note:** You must obtain your Total eClose™ eNotary certification prior to the closing on June 25, 2020.

**Thank You!**  
[Settlement Agent Name]  
[Settlement Agent Company Name]  
[Settlement Agent eMail Address]



# Accept or Decline

The Notary will be taken to a page where they can accept or decline the request and provide comments regarding the decision.

The screenshot displays the Docmagic Notary portal. At the top, there is a navigation bar with links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, REQUEST A DEMO, and DASHBOARD / LOG OUT. The main content area features a header with the Docmagic logo and a navigation menu. Below this, a message states: "Docmagic, Your services are requested for a remote online notarization for 1 participants on October 29, 2022 at 12:00pm PDT for a property in Burlington, NJ." Two buttons, "ACCEPT" (teal) and "DECLINE" (orange), are prominently displayed. A red asterisk note reads: "\*Please note: If we do not receive a response within 2 hours, we may have to engage another service provider." At the bottom, a "Thank You!" message is signed by Sally Settlement, Settlement Closing Company, with the email sally.settlement223@mailinator.com. A blue arrow points from the explanatory text box to the "ACCEPT" button.

**Pro Tip:** They have two (2) hours to accept or decline before the system alerts the Settlement Agent to assign another Notary.



# Access to the eClose Console

All pertinent loan information is at the top of the notary's screen including Borrower, Lender and Settlement Agent info.

**DocMagic eClose Console (Notary)**

**LOAN** Loan #: 1636481916201  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 1636481916201 (...)

**LENDER** Company: SAMPLE SONS L...  
Contact: Michael Morford  
Email: mikem@docmagic...  
Phone: (555) 555-5555

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: strullt@docmagic.c...  
Phone: (987) 555-4321

**COUNTDOWN TO CLOSING**  
DAYS: 0 HOURS: 0 MINUTES: 0 SECONDS: 0  
Date: Apr 18, 2023 (Wed) Time: 12:00am PDT [Edit](#)

**Signers (3)**

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

**Documents (6)** Preview Mode  OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	<input checked="" type="checkbox"/>	
2	Multistate Fixed Rate Electronic Note	4	1	<input checked="" type="checkbox"/>	
3	MERS New Jersey Mortgage	15	2	<input checked="" type="checkbox"/>	
4	Specific Closing Instructions	4	2	<input checked="" type="checkbox"/>	
5	Occupancy and Financial Status Affidavit	3	2	<input checked="" type="checkbox"/>	
6	Signature Affidavit and AKA Statement	2	2	<input checked="" type="checkbox"/>	

The Signer area highlights the information needed for closing participants, including identity utilities such as KBA and I.D. validation, and the current status of the eClose process.



# Access to the eClose Console

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

DocMagic eClose Console (Notary)

**LOAN** Loan #: 1636481916201  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 1636481916201

**LENDER** Company: SAMPLE SONS L...  
Contact: Michael Morford  
Email: mikem@docmagic.com  
Phone: (555) 555-5555

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: sally@docmagic.com  
Phone: (987) 555-4321

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

Details eJournal Action Log Start eClosing

**Signers (3)**

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

**Documents (6)** Preview Mode  OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	<input checked="" type="checkbox"/>	
2	Multistate Fixed Rate Electronic Note	4	1	<input checked="" type="checkbox"/>	
3	MERS New Jersey Mortgage	15	2	<input checked="" type="checkbox"/>	
4	Specific Closing Instructions	4	2	<input checked="" type="checkbox"/>	
5	Occupancy and Financial Status Affidavit	3	2	<input checked="" type="checkbox"/>	
6	Signature Affidavit and AKA Statement	2	2	<input checked="" type="checkbox"/>	

The Documents area includes all the documents to be executed. Click on any of these documents to review.



# Help Button

From the Notary Console, you can find a tutorial just like the one you're reading now. Just click on the name, then Help.

**DocMagic eClose Console (Notary)**

**Doc** ▾

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

**LOAN** Loan #: 1636481916201  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 1636481916201 [...]

**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

**Signers (3)**

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

**Documents (6)**

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	✓	
2	Multistate Fixed Rate Electronic Note	4	1	✓	
3	MERS New Jersey Mortgage	15	2	✓	
4	Specific Closing Instructions	4	2	✓	
5	Occupancy and Financial Status Affidavit	3	2	✓	
6	Signature Affidavit and AKA Statement	2	2	✓	

Preview Mode  OFF





# The eClose Console

Knowledge-based Authentication (KBA) and I.D. Verify Status can be found here.

**DocMagic eClose Console (Notary)**

**LOAN** Loan #: 1636481916201  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 1636481916201 (...)

**LENDER** Company: SAMPLE SONS L...  
Contact: Michael Morford  
Email: mikem@docmagic...  
Phone: (555) 555-5555

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: strull@docmagic.c...  
Phone: (987) 555-4321

**COUNTDOWN TO CLOSING**  
DAYS: 0 HOURS: 0 MINUTES: 0 SECONDS: 0  
Date: Apr 18, 2023 (Wed) Time: 12:00am PDT Edit

Start eClosing

**Signers (3)**

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	John Smith strull@docmagic.com	Borrower	Doc Magic ron-test@docmagic.com	DocMagic RON 11/9/2021 - 12:00am			<input type="radio"/> Not Started	<input type="button" value="Open Signing Room"/>
2	Oliver Originator oliver.originator@mailinat...	Originator					<input checked="" type="radio"/> Ready to Sign	<input type="button" value="Open Signing Room"/>
3	Sally Settlement strull@docmagic.com	Settlement Agent					<input checked="" type="radio"/> Ready to Sign	<input type="button" value="Open Signing Room"/>

**Documents (6)** Preview Mode  OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	<input checked="" type="checkbox"/>	
2	Multistate Fixed Rate Electronic Note	4	1	<input checked="" type="checkbox"/>	
3	MERS New Jersey Mortgage	15	2	<input checked="" type="checkbox"/>	
4	Specific Closing Instructions	4	2	<input checked="" type="checkbox"/>	
5	Occupancy and Financial Status Affidavit	3	2	<input checked="" type="checkbox"/>	
6	Signature Affidavit and AKA Statement	2	2	<input checked="" type="checkbox"/>	

Depending on where they are in the process, a participant may need to complete these two functions before they can begin executing their documents.



# Knowledge-Based Authentication

Click on the envelope to send the KBA email invitation to the participant.

**DocMagic eClose Console (Notary)**

**LOAN** Loan #: 1636481916201  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 1636481916201 (...)



**LENDER** Company: SAMPLE SONS L...  
Contact: Michael Morford  
Email: mikem@docmagic.com  
Phone: (555) 555-5555

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: sstruitt@docmagic.c...  
Phone: (987) 555-4321

**COUNTDOWN TO CLOSING**  
DAYS: - HOURS: - MINUTES: - SECONDS: -  
Date: Apr 18, 2023 (Wed) Time: 12:00am PDT Edit

Start eClosing

**Signers (3)**

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

**Documents (6)** Preview Mode  OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	✓	
2	Multistate Fixed Rate Electronic Note	4	1	✓	
3	MERS New Jersey Mortgage	15	2	✓	
4	Specific Closing Instructions	4	2	✓	
5	Occupancy and Financial Status Affidavit	3	2	✓	
6	Signature Affidavit and AKA Statement	2	2	✓	



# Sending the KBA Email

This pop-up window will allow the notary to add an email for the participant.

The screenshot displays the DocMagic eClose Console (Notary) interface. The main dashboard includes sections for LOAN (Loan #: 1536481916201, Primary Borrower: John Smith, Type: EClosing, Package ID: 417559, Worksheet #: 1536481916201), LENDER (Company: SAMPLE SONS L., Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (555) 555-5555), SETTLEMENT AGENT (Company: Settlement Closing..., Contact: Sally Settlement, Email: strull@docmagic.c..., Phone: (887) 555-4321), and a COUNTDOWN TO CLOSING timer (Date: Apr 18, 2023 (Wed), Time: 12:00am PDT). Below these are tabs for Details, eJournal, and Action Log, along with a Start eClosing button.

The Signers (3) table is visible in the background:

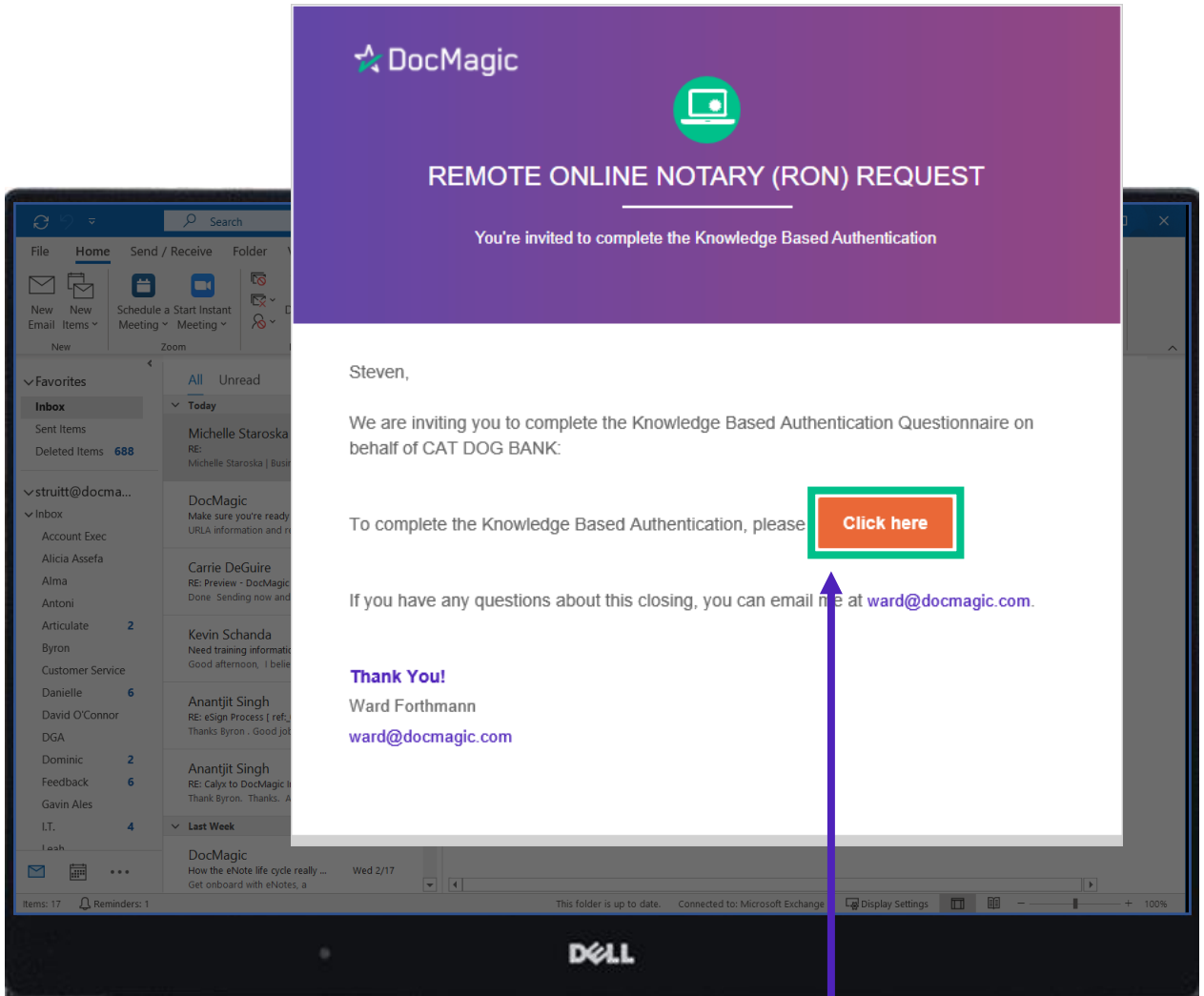
#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	John Smith strull@docmagic.com	Borrower	Doc Magic ron-lesl@docmagic.com	DocMagic RON 11/9/2021 - 12:00am	✉ ○	👤 ○	● Not Started	Open Signing Room
2	Oliver Originator oliver.originator@mailinat...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

The KBA pop-up window is in the foreground, titled "KBA". It contains the following elements:

- Email KBA** (checked)
- Email:** (pre-populated email address) - This field is highlighted with a green box and a purple arrow pointing from the text above.
- Enter additional comments to be sent with the KBA Link** (text area with "Add comments here" placeholder)
- KBA Link:** [KBA Link is displayed here] with a **Copy Link** button.
- Buttons:** Cancel, **Email KBA** (highlighted with a green box and a purple arrow pointing from the text above), and Required.



# KBA Invitation Email



The Participant will receive this invitation email to complete the KBA process.



# KBA Assessment

The Participant will be brought to this page, where they will be prompted to complete the KBA process before accessing the eClosing Room.

**DocMagic**

**Welcome!**  
to your KBA Questionnaire

**Knowledge Based Authentication (KBA) Questionnaire**

[Borrower First Name],

Knowledge based authentication or KBA, is a method of authentication which is used to prove your identity for your upcoming property closing. As the name suggests, KBA requires the knowledge of your private information in order to prove that you are indeed the owner of the identity.

Please select the START KBA button below when you are ready to begin.

**START KBA** ➔

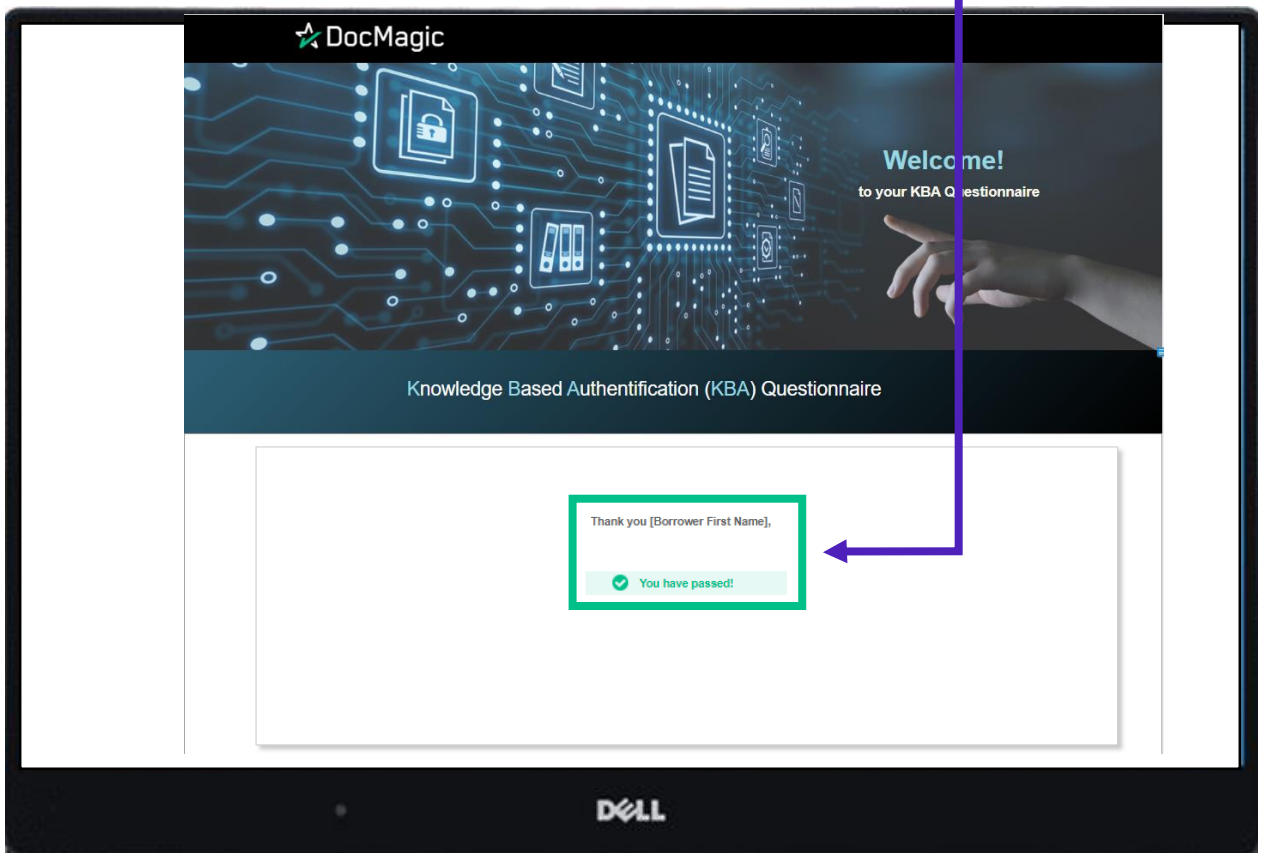
**DELL**

The Participant will then complete the questions and hit Submit to register their answers.



# KBA Assessment

If the Participant successfully completes the assessment, they will receive this confirmation.



# Identity Validation Request

A similar process occurs with the ID Verification buttons here.

The screenshot displays the DocMagic eClose Console (Notary) interface. At the top, there are tabs for 'Details', 'eJournal', and 'Action Log'. Below this, there are sections for 'LOAN', 'LENDER', and 'SETTLEMENT AGENT'. A 'COUNTDOWN TO CLOSING' widget shows the remaining time. The 'Signers (3)' section contains a table with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. The 'ID Verify / Status' column for the first signer, John Smith, has a cell phone icon highlighted with a blue box and a blue arrow pointing to it. Below the signers section is a 'Documents (6)' table with columns for #, eSign Enabled, Page(s), Signer(s), Completed, and Delete.

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

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	✓	
2	Multistate Fixed Rate Electronic Note	4	1	✓	
3	MERS New Jersey Mortgage	15	2	✓	
4	Specific Closing Instructions	4	2	✓	
5	Occupancy and Financial Status Affidavit	3	2	✓	
6	Signature Affidavit and AKA Statement	2	2	✓	

Click the Cell Phone icon to send the request to the Participant's mobile device.



# Identity Validation Request

Add the Participant's cell phone number to begin the ID validation process then hit the text identity verification button.

The screenshot displays the DocMagic eClose Console (Notary) interface. At the top, there are sections for LOAN, LENDER, and SETTLEMENT AGENT. Below these is a 'Signers (3)' table and a 'Documents (6)' list. An 'Identity Verification' dialog box is open in the foreground, featuring a 'Text Identity Verification' section with a 'Mobile Phone #' input field, a comment box, and a 'Text Identity Verification' button. A 'Copy Link' button is also present. The dialog box is overlaid on the main interface, which includes a 'Start eClosing' button and various status indicators.

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





## I.D. Validation via Smart Device



The Participant will receive a text message containing a link to complete the I.D. Verification process.



# Verification Complete

Green checkboxes show that the Participant has properly verified their identity and that the signing process may now begin.

The screenshot displays the DocMagic eClose Console (Notary) interface. At the top, there is a navigation bar with the DocMagic logo, the text "eClose Console (Notary)", and a user profile icon labeled "Doc". Below the navigation bar, there are several informational cards: "LOAN" (Loan #: 1636481916201, Primary Borrower: John Smith, Type: EClosing, Package ID: 417659, Worksheet #: 1636481916201), "LENDER" (Company: SAMPLE SONS L..., Contact: Michael Morford, Email: mikem@docmagic..., Phone: (555) 555-5555), and "SETTLEMENT AGENT" (Company: Settlement Closing..., Contact: Sally Settlement, Email: struff@docmagic.c..., Phone: (987) 555-4321). To the right of these cards is a "COUNTDOWN TO CLOSING" widget showing days, hours, minutes, and seconds, with a date and time of "Apr 18, 2023 (Wed) Time: 12:00am PDT". Below these cards are tabs for "Details", "eJournal", and "Action Log", and a "Start eClosing" button.

The "Signers (3)" section contains a table with the following data:

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	e-Sign
1	John Smith struff@docmagic.com	Borrower	Doc Magic ron-test@docmagic.com	DocMagic RON 11/9/2021 - 12:00pm			Ready to Sign	Open Signing Room
2	Oliver Originator oliver.originator@mailnat...	Originator					Ready to Sign	Open Signing Room
3	Sally Settlement struff@docmagic.com	Settlement Agent					Ready to Sign	Open Signing Room

The "Documents (6)" section contains a table with the following data:

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1		
2	Multistate Fixed Rate Electronic Note	4	1		
3	MERS New Jersey Mortgage	15	2		
4	Specific Closing Instructions	4	2		
5	Occupancy and Financial Status Affidavit	3	2		
6	Signature Affidavit and AKA Statement	2	2		



# Start eClose

By clicking the Start eClosing button, the notary activates the Start eClosing dialogue box.

**Start eClosing**

**You are about to start the eClosing process!**

A meeting invitation will be sent to the participants indicated below.

**Before you continue, please verify the following:**

- The loan package is complete and ready for eClosing
- All uploaded or e-enabled documents have been included

**Select the eClosing Participants below:**

Select	Signer	Email	Date	Time
<input checked="" type="checkbox"/>	John Smith	strutt@docmagic.com	11/9/2021	12:00pm
<input type="checkbox"/>	Oliver Originator	oliver.originator@mailinator.com		
<input type="checkbox"/>	Sally Settlement	strutt@docmagic.com		

Include link for knowledge-based authentication (KBA)



# Start eClose Control Panel

The notary sees the list of all possible participants in this box.

**Start eClosing**

**You are about to start the eClosing process!**  
A meeting invitation will be sent to the participants indicated below.

**Before you continue, please verify the following:**

- The loan package is complete and ready for eClosing
- All uploaded or e-enabled documents have been included

**Select the eClosing Participants below:**

Select	Signer	Email	Date	Time
<input checked="" type="checkbox"/>	John Smith	struitt@docmagic.com	11/9/2021	12:00pm
<input type="checkbox"/>	Oliver Originator	oliver.originator@mailinator.com		
<input type="checkbox"/>	Sally Settlement	struitt@docmagic.com		

Include link for knowledge-based authentication (KBA)

Make sure that all appropriate signers are selected to participate in the eClosing event.



# Meeting Invitation

**Start eClosing**

**You are about to start the eClosing process!**

A meeting invitation will be sent to the participants indicated below.

**Before you continue, please verify the following:**

- The loan package is complete and ready for eClosing
- All uploaded or e-enabled documents have been included

**Select the eClosing Participants below:**

Select	Signer	Email	Date	Time
<input checked="" type="checkbox"/>	John Smith	struitt@docmagic.com	11/9/2021	12:00pm
<input type="checkbox"/>	Oliver Originator	oliver.originator@mailinator.com		
<input type="checkbox"/>	Sally Settlement	struitt@docmagic.com		

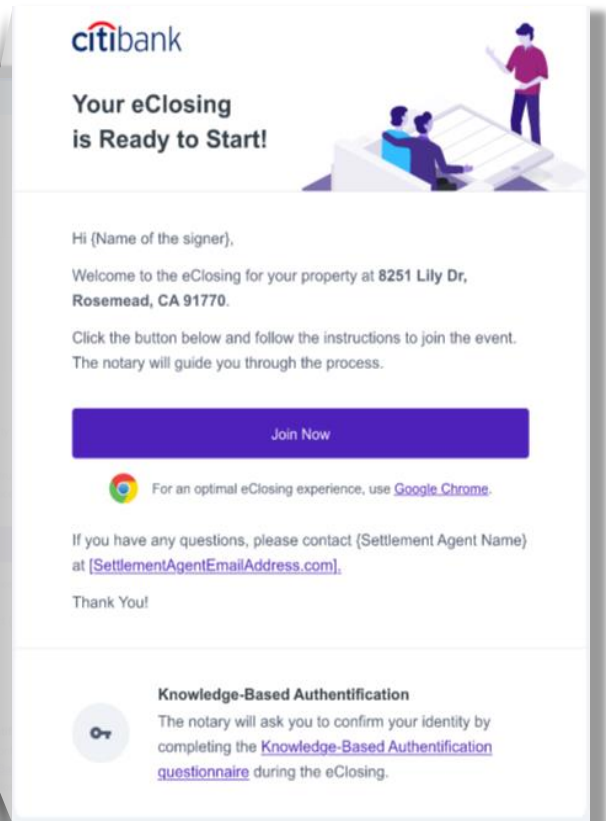
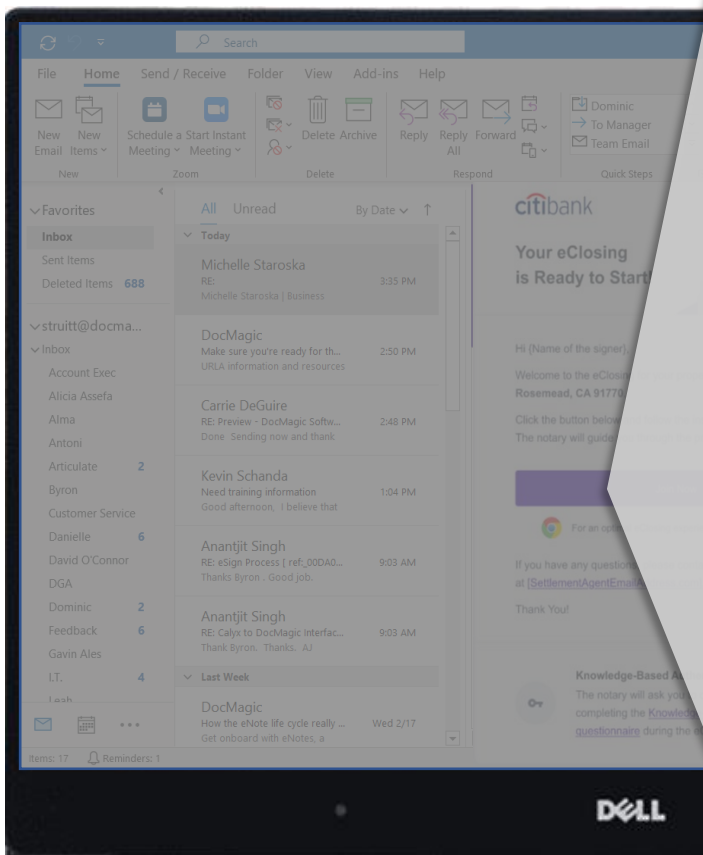
include link for knowledge-based authentication (KBA)

The notary also has the option of including a link for Knowledge-Based Authentication if the Participant has not completed it yet.



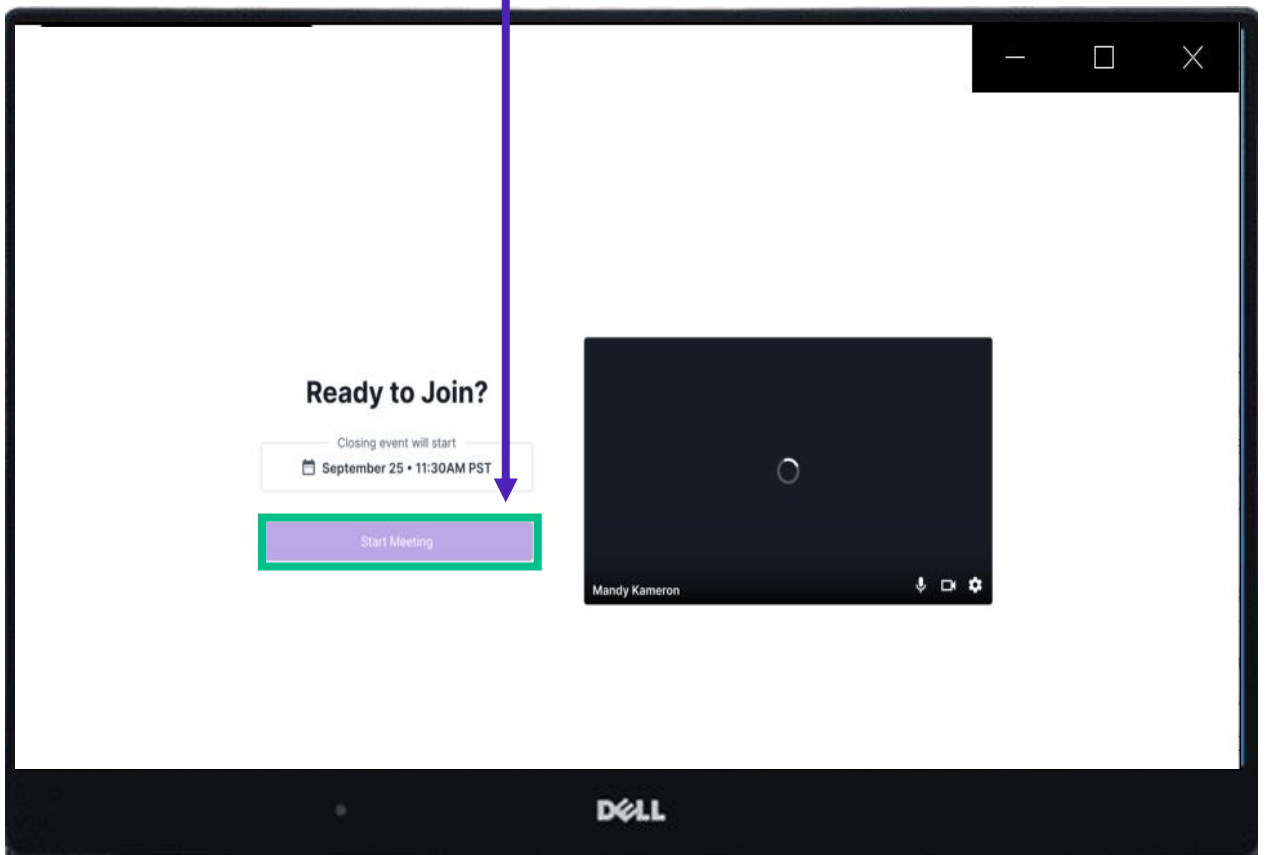
# Invitation Email

Participants will receive this invitation email containing all pertinent closing information and a Join Now button to enter the eClosing event.



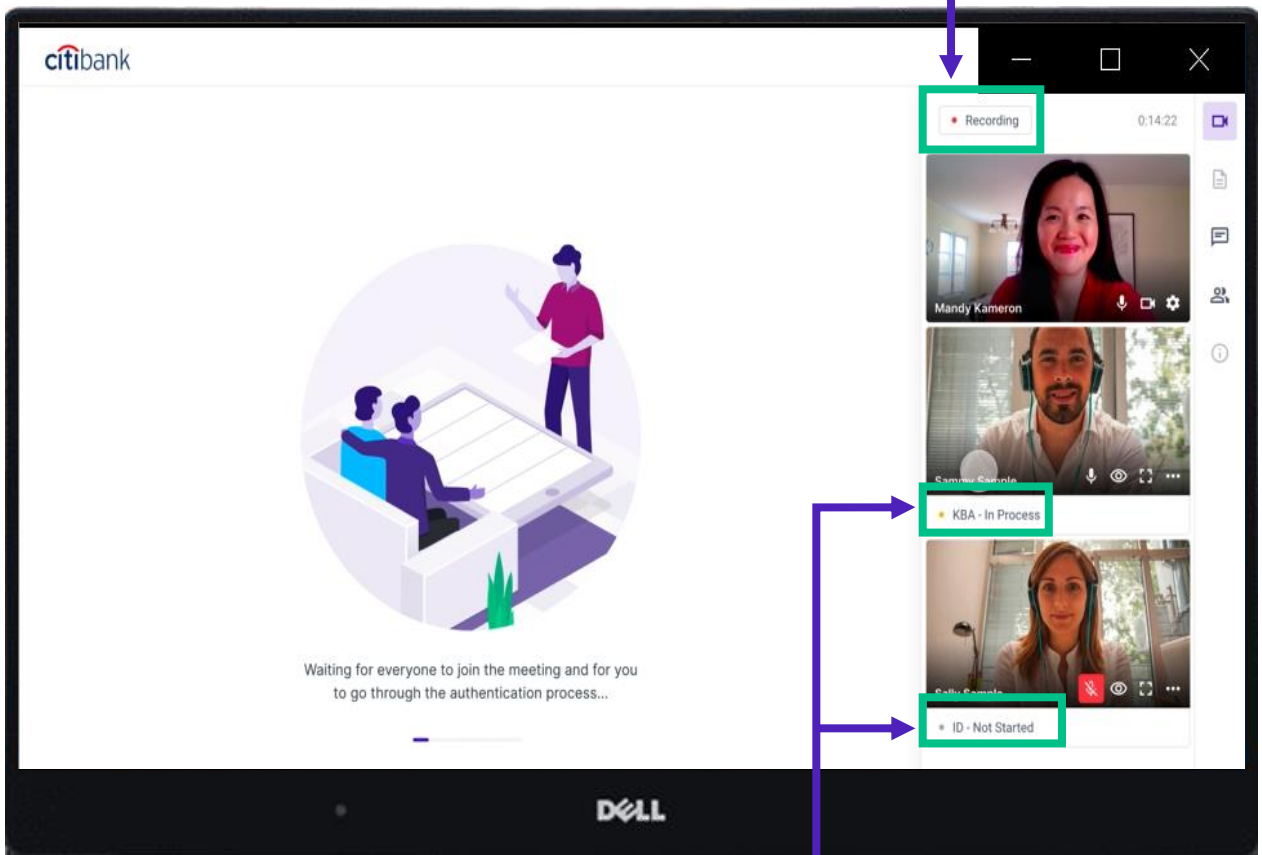
# Join Participants

When you're ready to join, click Start Meeting.



# Preparing for eSignatures

The moment the meeting begins, the session is automatically recorded.



This status reflects that the first signer, Sammy, is completing his KBA assessment while Sally is completing her ID verification.





## Ready to Sign

Once the signers complete their KBA (if applicable) and ID verification, their status will change to Ready to Sign and their start button will illuminate indicating it is safe to begin the signing process.

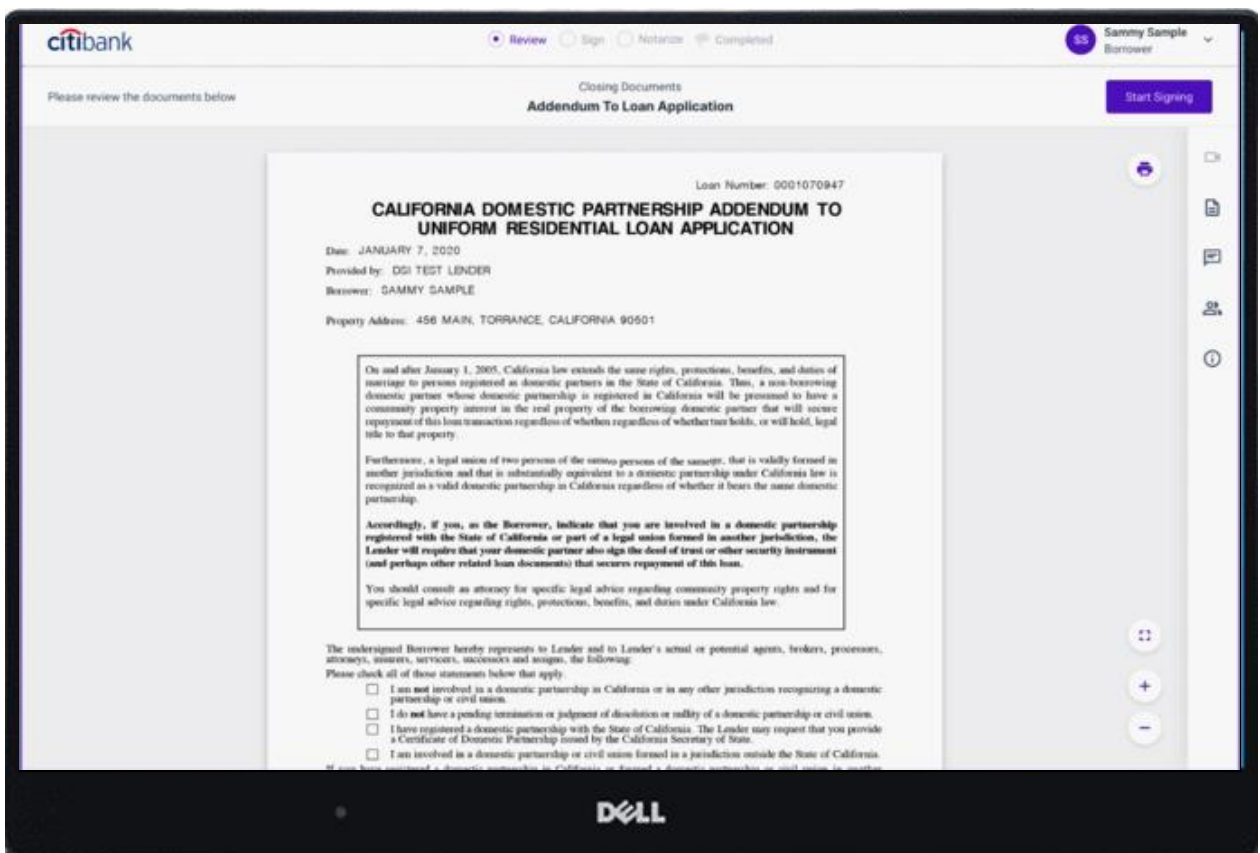
The screenshot displays a Citibank video signing interface. On the left, a large circular illustration shows a person standing and gesturing towards two seated people at a table. Below this illustration, the text reads: "Waiting for everyone to join the meeting and for you to go through the authentication process...". On the right, a video conference window shows three participants: Mandy Kameron, Sammy Sample, and Sally Sample. Each participant's name is displayed below their video feed. Underneath the names, there are status indicators: "Ready to Sign" (highlighted with a green box) and a "Start" button (highlighted with a green box). A purple line with arrows originates from the text box above and points to the "Ready to Sign" status and the "Start" button for Sammy Sample.

Only one signer can execute documents at a time.



# Signer's View

Hitting the start button opens the signing page.



The signer will see the document view fully in their screen.



# Participants' View

The other Participants will see the signer's screen exactly as it appears to the signer.

The screenshot shows a Citibank web application interface for a loan application. The document is titled "CALIFORNIA DOMESTIC PARTNERSHIP ADDENDUM TO UNIFORM RESIDENTIAL LOAN APPLICATION". It includes fields for Date (JANUARY 7, 2020), Provided by (DSI TEST LENDER), Borrower (SAMMY SAMPLE), and Property Address (456 MAIN, TORRANCE, CALIFORNIA 90501). The document text discusses California law regarding domestic partnerships and community property. A "Start Signing" button is visible in the top right of the document viewer.

Overlaid on the right side of the document viewer is a Zoom meeting window. The meeting title is "Currently watching Sammy Sample". The meeting shows three participants: Mandy Kameron, Sammy Sample, and Gally Sample. Mandy Kameron and Gally Sample are both marked as "Ready to Sign" with a "Start" button next to their names. The Zoom interface includes a recording indicator, a timer (0:14:22), and various meeting controls.

They will also see everybody else on the call.



# Applying Signer eSignatures

The Participant will apply their electronic signature to each area indicated by the system, and then will be automatically advanced to the next signature field until the signing process is complete.

The screenshot displays the DocMagic e-signature platform interface. At the top, the DocMagic logo is on the left, and navigation options 'Review', 'Sign', and 'Completed' are in the center. The user 'JOHN SMITH' is identified as the Borrower on the right. The document title is 'Borrower Consent To The Use Of Tax Return Information'. The document content includes:

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

Loan Number: 1111122221  
Date: MARCH 1, 2021  
Lender: DSI TEST LENDER (OKSANA MAEVA)  
Borrower: JOHN SMITH  
Property Address: 456 MADISON AVE  
MONTEBELLO, FLORIDA 90640

I understand, acknowledge, and agree that the Lender and Other Loan Participants can obtain, use and share tax return information for purposes of (i) providing an offer; (ii) originating, maintaining, managing, monitoring, servicing, selling, insuring, and securitizing a loan; (iii) marketing; or (iv) as otherwise permitted by applicable laws, including state and federal privacy and data security laws. The Lender includes the Lender's affiliates, agents, service providers and any of aforementioned parties' successors and assigns. The Other Loan Participants includes any actual or potential owners of a loan resulting from your loan application, or acquirers of any beneficial or other interest in the loan, any mortgage insurer, guarantor, any servicers or service providers for these parties and any of aforementioned parties' successors and assigns.

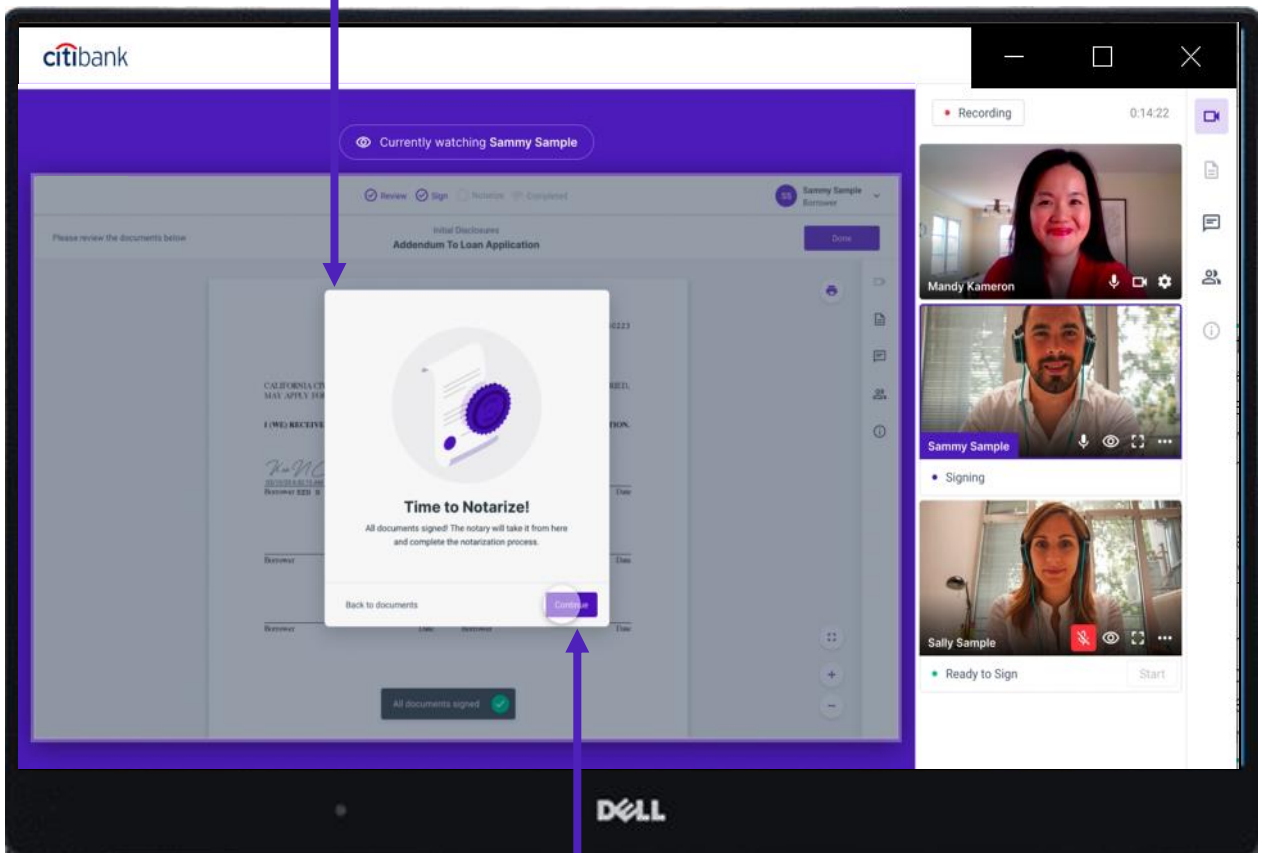
At the bottom of the document, there is a 'Sign' field for the borrower, JOHN SMITH, with a 'Date' field next to it. A 'Sign' button is highlighted in green. To the right, a list of documents to be signed is shown, including 'Uniform Residential Loan Application', 'Florida Fixed Rate Electronic Note', 'Florida Mortgage - Mers', 'Specific Closing Instructions', 'Borrower's Certification And Author...', 'Hazard Insurance Authorization And...', 'W9 - Payers Request For Taxpayer Id', 'Notice Of Servicing Transfer', 'Acknowledgment Of Receipt Of App...', 'Borrower Consent To The Use Of Ta...', 'Certificate Of Loans To One Borrower', 'Closing Disclosure', 'Federal Equal Credit Opportunity Ac...', 'Florida Compliance Agreement', 'Florida Notice To Purchaser-mortga...', 'Florida Statement Of Anti-coercion', 'ives Request For Transcript Of Tax R...', 'Impound Authorization', 'Initial Amortization Schedule', 'Initial Escrow Account Disclosure S...', and 'Notice Concerning Furnishing Negat...'. A 'Signatures to Go' indicator shows 31 remaining.

Some forms may request additional data entry or option selection, such as checkboxes.



# The Notarization Process

The Notary will receive a notice once it's time to notarize the first signer's documents.

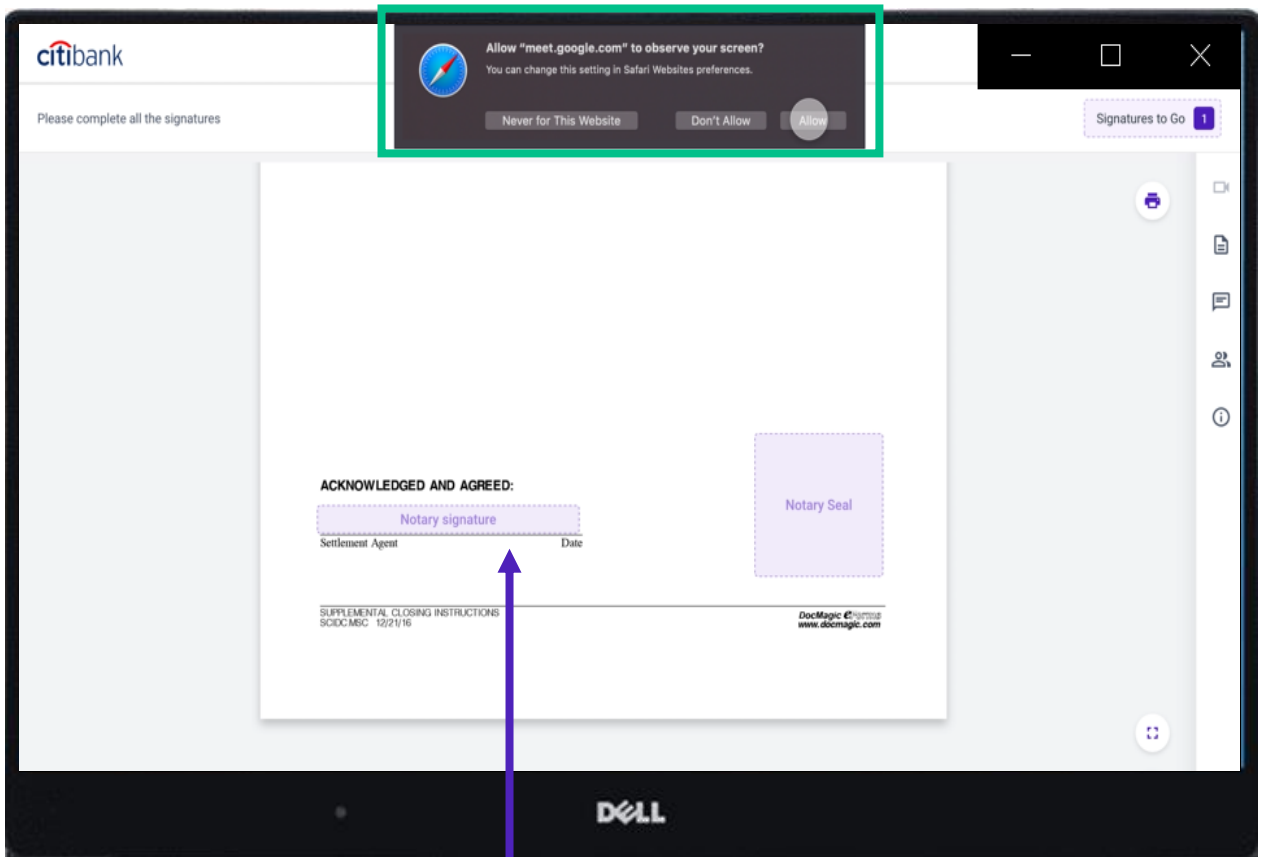


The Notary will click their way through the notarization process until all required documents have been successfully notarized.



# Add Your Signature, Seal, and more

The Notary must always allow their screen to be observable.

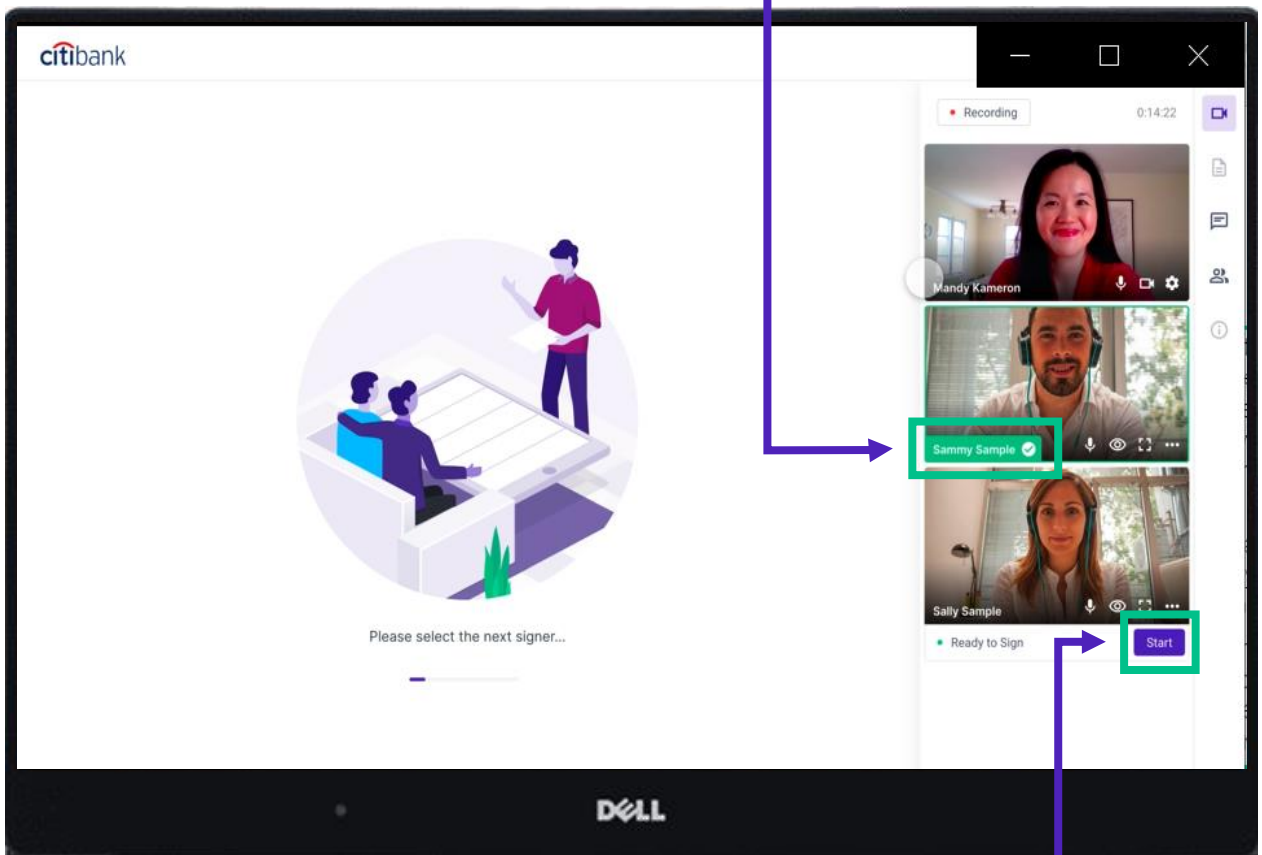


When the Notary clicks on the signature line, their signature and any other pertinent data, such as their Notary seal, will be automatically inserted.



# Status **Green** When Complete

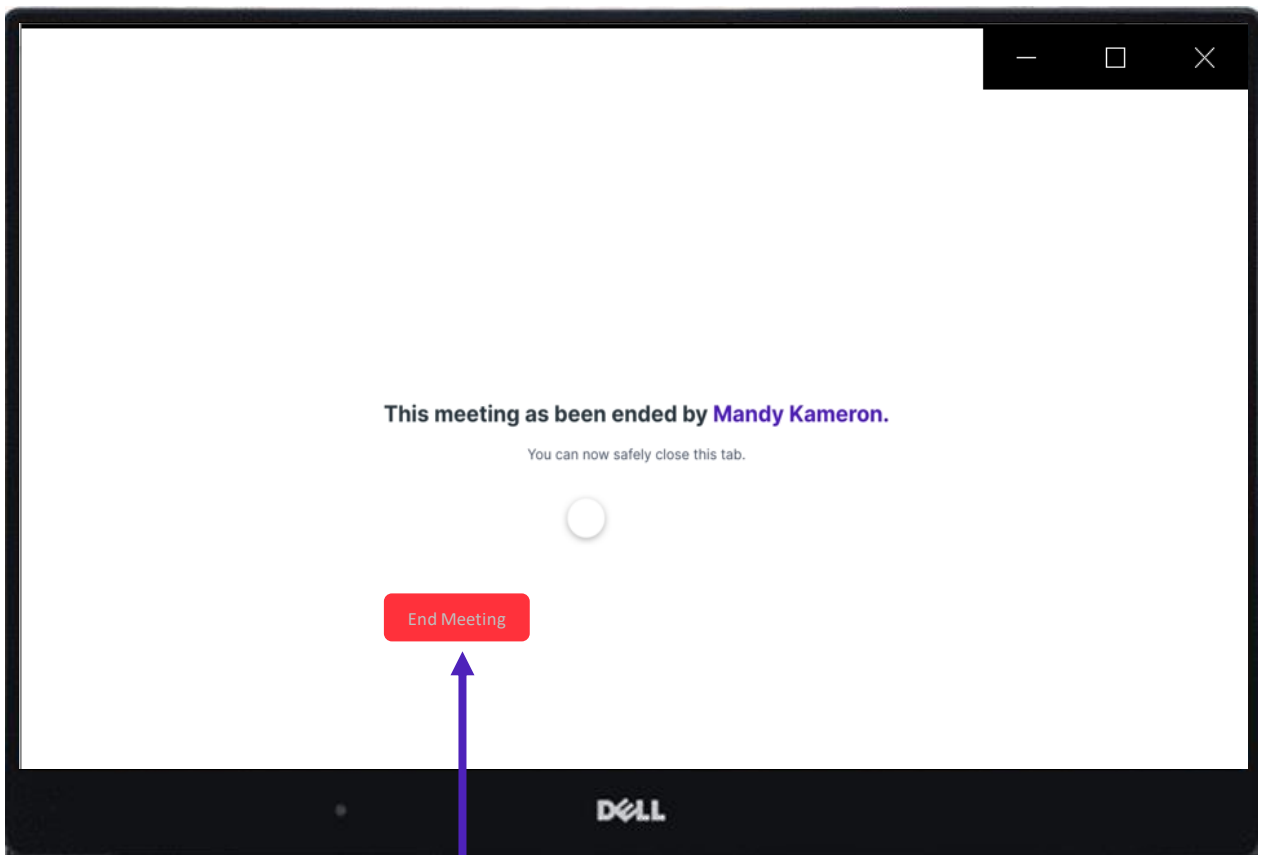
Once the first Signer is finished, the notary sees the status change to Signing Complete.



The Notary will repeat the process for the next Signer by clicking their Start button. They must do this for all Signers.



## Ending the Meeting



The process is done once all the documents have been signed and the notarization process has been completed. The meeting may now end.







Final Actions & Confirmation

# Back to the Settlement Agent Portal

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

**CLOSING COMPLETED** Congratulations!

Ready to Close

Notary Cam 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	✉️ ⓪	📄 ⓪	Finished	Open Signing Room
2	Sally Settlement sally.settlement@exempl...	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



# eClose Console Confirmation

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

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



## Email Confirmation

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.



# eJournal

Click on this tab to access the eJournal.

The screenshot displays the DocMagic eClose console interface. At the top, there is a navigation bar with the DocMagic logo, the text "eClose console (Notary)", and a user profile icon labeled "Doc". Below the navigation bar, there are four main sections: "LOAN", "LENDER", "SETTLEMENT AGENT", and "CLOSING COMPLETED". The "LOAN" section includes fields for Loan #, Primary Borrower, Type, Package ID, and Worksheet #. The "LENDER" section includes Company, Contact, Email, and Phone. The "SETTLEMENT AGENT" section includes Company, Contact, Email, and Phone. The "CLOSING COMPLETED" section features a "Congratulations!" message with a house icon. Below these sections, there are tabs for "Details", "eJournal", and "Action Log". The "eJournal" tab is highlighted with a green box. Below the tabs, there is a "Journal" section with a table containing one entry. The table has columns for "#", "Signer", and "Notarization Date and Time". The entry shows "1", "John Smith", and "November 9, 2021 • 10:32am PST". A green box highlights a down arrow icon at the end of this row. Below the "Journal" section, there is a "Recordings" section with a table containing one entry. The table has columns for "#", "File", and "Date Recorded". The entry shows "1", "417659\_2021-11-09T18:27:54.132Z.mp4", and "November 9, 2021 • 10:27am PST". A green box highlights a down arrow icon at the end of this row. The Dell logo is visible at the bottom of the screen.

Click on the down arrow to access the borrower's journal.



# eJournal

Use the dropdown menus to select the type of Notarial Service. Toggle choices by clicking on the box and using the up and down arrow keys.

The screenshot displays the DocMagic eClose Console (Notary) interface. At the top, there is a navigation bar with the DocMagic logo, the text "eClose Console (Notary)", and a search bar. Below the navigation bar, there are four main sections: LOAN, LENDER, SETTLEMENT AGENT, and CLOSING COMPLETED. The LOAN section shows details for Loan # 1636481916201, Primary Borrower John Smith, Type EClosing, Package ID 417659, and Worksheet # 1636481916201. The LENDER section shows Company SAMPLE SONS L..., Contact Michael Morford, Email mikem@docmagic..., and Phone (555) 555-5555. The SETTLEMENT AGENT section shows Company Settlement Closing..., Contact Sally Settlement, Email struitt@docmagic.c..., and Phone (987) 555-4321. The CLOSING COMPLETED section shows a house icon and the text "Congratulations!".

Below these sections, there are tabs for Details, eJournal, and Action Log. The eJournal tab is selected, showing a "Journal" section with a list of signers. The first signer is John Smith, with a Notarization Date and Time of November 9, 2021 • 10:32am PST. Below the list, there is a form for the signer's details, including contact information and a signature field with the signature "John Smith".

The "Document Notarized" section shows a table with columns for "Document Notarized", "\*Notarial Service", and "Fee". The table contains three rows of data:

Document Notarized	*Notarial Service	Fee
MERS New Jersey Mortgage Nov 9, 2021 • 10:32am PST	Acknowledgement	\$0.00
Occupancy and Financial Status Affidavit Nov 9, 2021 • 10:32am PST	Jurat	\$0.00
Signature Affidavit and AKA Statement Nov 9, 2021 • 10:32am PST	Affidavit	\$0.00

At the bottom right of the form, there are "Cancel" and "Save" buttons.

Enter the fee for each Notarial Service performed here.



The notary journal contains the audio and video of each RON signing session.

The screenshot displays the DocMagic eClose Console (Notary) interface. At the top, there is a navigation bar with the DocMagic logo, the text "eClose Console (Notary)", and a user profile icon labeled "Doc". Below the navigation bar, there are several informational boxes: "Package ID: 437477", "Worksheet #: 2192 (Version: 1)", and two contact boxes for "leah@docmagic.com" with phone numbers (817) 881-2003 and (987) 555-4321. A "Congratulations!" message is also visible. The main content area is titled "Journal" and contains a table with the following data:

#	Signer	Notarization Date and Time
1	John Smith	December 15, 2021 • 1:40pm CST

Below the table, there is a detailed view of the notary service for John Smith. It includes sections for "Signer's Details" (John Smith, 222333 PEACHTREE PLACE, ATLANTA, GA 30318), "Contact Information" (Mobile: (562) 652-2578, Home: (502) 767-8509, shandi@docmagic.com), "Signature" (with a handwritten signature), and "Identification Details" (Driver's License: 123456 • Exp. 4/14/2022). The "Document Notarized" section lists "MERS New Jersey Mortgage" (Dec 15, 2021 • 1:39pm CST) and "Signature Affidavit and AKA Statement" (Dec 15, 2021 • 1:40pm CST). The "Notarial Service" section shows "Acknowledgement" and "Affidavit" with a fee of \$0.00 for each. There are "Cancel" and "Save" buttons at the bottom right of this section.

Below the detailed view, there is a "Recordings" table with the following data:

#	File	Date Recorded
1	437477_2021-12-15T19:35:38.012Z.mp4	December 15, 2021 • 1:35pm CST

A green box highlights the "Recordings" table, and a purple arrow points from it to the text box below.

This will be stored within the eJournal (console) under "Recordings" only for 90 days.



You must print out this journal, download and save the video internally before 90 days.

The screenshot displays the DocMagic eClose Console (Notary) interface. At the top, there is a navigation bar with the DocMagic logo, 'eClose Console (Notary)', and a user profile icon labeled 'Doc'. Below the navigation bar, there are several informational boxes: Package ID: 437477, Worksheet #: 2192 (Version: 1), and two contact emails with phone numbers. A 'Congratulations!' message is also visible. The main content area is divided into three tabs: 'Details', 'eJournal', and 'Action Log'. The 'eJournal' tab is active, showing a 'Journal' section with a table of notary entries. The first entry is for John Smith, dated December 15, 2021, at 1:40pm CST. Below the table, there is a detailed view of the notary service, including 'Signer's Details', 'Document Notarized', and 'Notarial Service' with a fee of \$0.00. A signature of John Smith is visible. Below the journal, there is a 'Recordings' section with a table of recorded files. The first recording is a video file named '437477\_2021-12-15T19:35:38.012Z.mp4', recorded on December 15, 2021, at 1:35pm CST. A blue arrow points from the 'Download' icon in the Recordings table to a text box below.

The best practice would be to store these materials right after the signing experience. Click here to download.





# Action Log

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, there are tabs for 'Details', 'eJournal', and 'Action Log', with 'Action Log' being the active tab. Below the tabs, there is a table with the following data:

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

At the bottom of the table, there is a text input field with a button labeled 'Add Internal Note To Action Log'.

You may also add notes at the bottom.

