



Remote Online Notary

Helpful Tips

RON Helpful Tips

#1: Don't Confuse These Buttons!

Click here to upload *new* documents to the package.

The screenshot shows the DocMagic interface for a loan closing console. At the top, there are sections for LOAN, LENDER, and SETTLEMENT AGENT. A 'COUNTDOWN TO CLOSING' widget shows 0 days, 21 hours, 35 minutes, and 21 seconds remaining. Below this is a 'Signers (3)' 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 'Documents (6)' section is at the bottom, with a table listing documents like 'Closing Disclosure', 'Multistate Fixed Rate Electronic Note', etc. Two buttons are highlighted with green boxes and arrows: a document icon button and a document with a checkmark icon button.

#	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@mailin...	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 here to upload *ink-signed* documents.

NOTE: It is extremely important that you do not mix up these two buttons and upload documents to the wrong place.



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#1: Don't Confuse These Buttons!

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

The screenshot displays the DocMagic interface for a loan package. The top navigation bar includes 'Close Console (Notary)' and a user profile 'Doc'. The main content area is divided into sections for 'LOAN', 'LENDER', 'SETTLEMENT AGENT', and a 'COUNTDOWN TO CLOSING' timer. Below these is a 'Signers (3)' table and a 'Documents (6)' section. A red box highlights the 'Add Document' icon (a document with a plus sign) in the 'Documents (6)' section. An 'Open' file dialog is overlaid on the interface, showing a file named 'AZACPRS.TTL.pdf' selected. A red box highlights the 'Browse' button in the dialog.

#	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@mail.com	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"/>

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

Name	Date modified	Type	Size
WVN	8/6/2020 3:06 PM	File folder	
61G1jfC9qPL_AC_SL1000.jpg	8/25/2020 9:30 AM	JPG File	72 KB
ad_users.csv - Shortcut	1/13/2020 12:59 PM	Shortcut	2 KB
Adobe Connect	11/17/2017 1:04 PM	Shortcut	1 KB
appraisal.pdf	4/22/2019 11:51 A...	Adobe Acrobat D...	737 KB
articulate-360.exe	5/17/2019 2:54 PM	Application	85,422 KB
AutoprepDocs.zip	11/8/2019 2:25 PM	Compressed (zipp...	3,106 KB
AZACPRS.TTL.pdf	6/19/2018 9:29 AM	Adobe Acrobat D...	109 KB
Cisco Webex Meetings	7/9/2020 10:57 AM	Shortcut	3 KB
DMO Script.docx	10/29/2020 7:13 A...	Microsoft Word D...	36 KB
DocMagic - Chrome	9/8/2020 3:49 PM	Shortcut	3 KB
DocMagic eSign Demo.pptx	5/7/2019 3:57 PM	Microsoft PowerPo...	5,786 KB
DocMagic Intranet	1/30/2020 1:18 PM	Internet Shortcut	1 KB
DocMagic Online	12/16/2020 7:59 A...	Shortcut	3 KB



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#1: Don't Confuse These Buttons!

The rightmost icon allows you to upload documents that have been ink signed.

The screenshot displays the DocMagic eClose Console (Notary) interface. On the left, there is a 'LOAN' summary with fields for Loan # (1636481916201), Primary Borrower (John Smith), Type (EClosing), Package ID (417659), and Worksheet # (1636481916201). Below this is a 'LENDER' section with fields for Company (SAMPLE), Contact (Michael S...), Email (michael@...), and Phone (650) 555-... A 'Signers (3)' table lists John Smith (Borrower), Oliver Originator (Originator), and Sally Settlement (Settlement Agent). A 'Documents (6)' list includes Closing Disclosure, Multistate Fixed Rate Electronic Note, MERS New Jersey Mortgage, Specific Closing Instructions, Occupancy and Financial Status Affidavit, and Signature Affidavit and AKA Statement. A 'Documents' section at the bottom shows a list of documents with icons for each. A red box highlights the rightmost icon in this list, which is a QR code. A blue arrow points from this icon to a callout box at the bottom of the page. On the right side of the interface, a document preview is shown with a red border. At the top of the preview is an 'IMPORTANT' notice: '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.' Below this is an 'INSTRUCTIONS' section with three main steps: 1. Print this document, 2. Carefully review and sign each document, and 3. Return the document. Step 3 includes sub-instructions for using the LoanMagic App, the eSign website, or a fax machine. At the bottom of the preview, there is a QR code with the text '75605744-3' below it. A blue arrow points from this QR code to the callout box at the bottom of the page.

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 1-866-620-1583

Loan: 777435612
Pages: 25
From: STEVE SAMPLE

75605744-3

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



RON Helpful Tips

#2: Fix Incorrectly Tagged Docs While Signing!

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

The screenshot displays a document signing interface. At the top, there are navigation buttons: Review, Sign, Notarize, and Completed. The user is identified as JOHN SMITH, Customer. The document title is "Closing Documents" and "Borrower's Certification, Authorization and Consent". The document content includes a section titled "BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION" and a list of purposes for which tax return information can be used. At the bottom, there are two signature lines for the Borrower, JOHN SMITH, and two date lines. A green box highlights the first signature line, which is empty, indicating a missing signature field. A blue arrow points from a text box below to this signature line.

In this example, there's a missing signature field for the borrower to sign.



RON Helpful Tips

#2: Fix Incorrectly Tagged Docs While Signing!

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

The screenshot displays the DocMagic eClosing Console (Notary) interface. At the top, there are sections for LOAN, LENDER, SETTLEMENT AGENT, and a COUNTDOWN TO CLOSING timer. Below these are tabs for Details, eJournal, and Action Log, along with a Start eClosing button. The main area shows a list of Signers (3) with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Below the signers is a Documents (6) section with a pencil icon highlighted in a green box. An inset window shows the document editing interface for a 'California Deed of Trust (MERS)' document, with a 'Tags' panel on the right.

#	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@mailinat...	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		5	1	<input checked="" type="checkbox"/>	

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 purposes of:

- (i) providing an offer;
- (ii) originating, underwriting, managing, monitoring, servicing, selling, insuring, and securitizing a loan; or
- (iii) an otherwise permitted by applicable laws, including state and federal privacy and data security laws; or
- (iv) 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 acquirers of any beneficial or other interest in the loan, any mortgage insurer, guarantor, any servicers or service providers for those parties and any of aforementioned parties' successors and assigns.

John Smith

Borrower JOHN SMITH Date Borrower Date

[Previous Page](#) [Next Page](#)

Tags

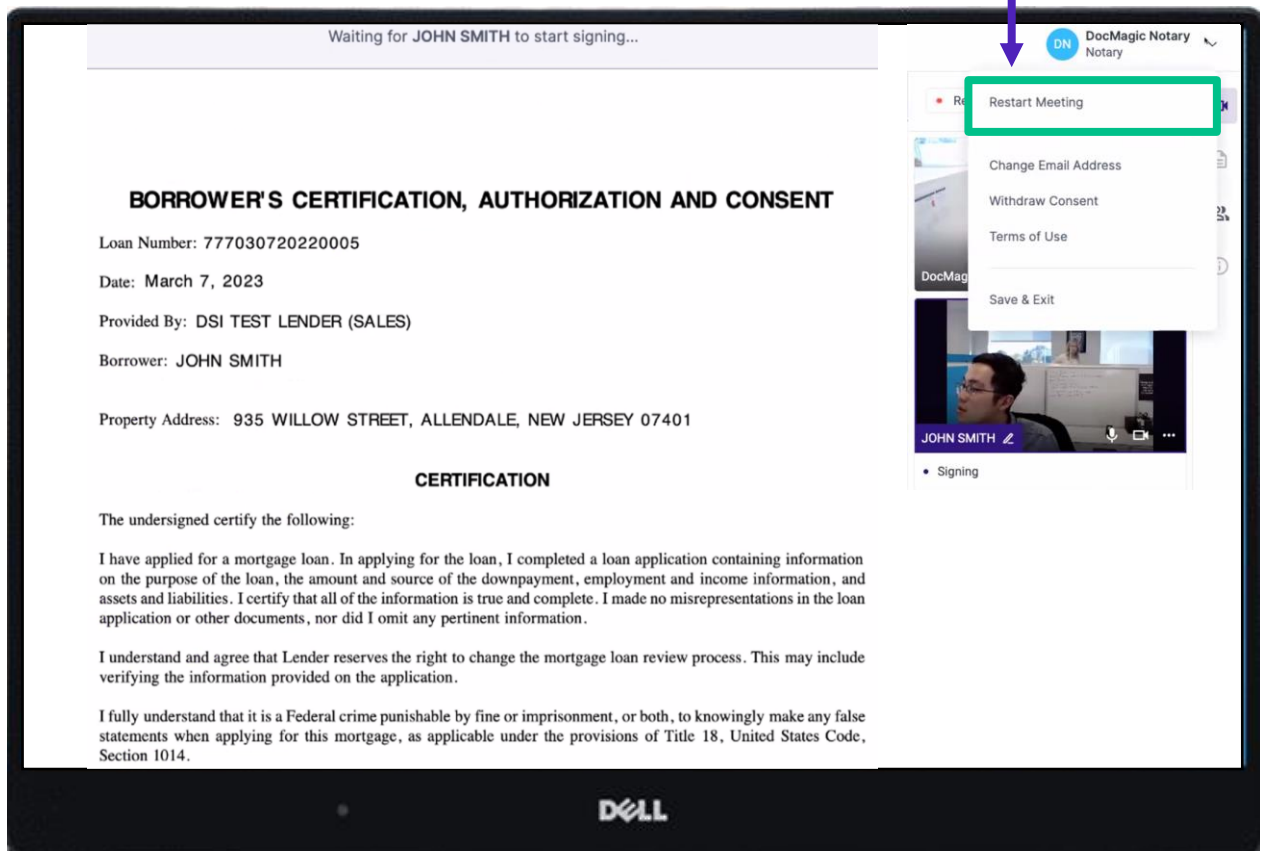
- Signature & Initials
 - Signature
 - Initials
- PostFill
 - Textbox
 - Phone Number
 - Date
 - Checkbox
 - Radio
- Notary Field
 - Signature
 - Notary Seal
 - Notarization State
 - Notarization County
 - Signing Date
 - Notary Name
 - RON text
 - Commission Expiration
 - Appearance Day



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#2: Fix Incorrectly Tagged Docs While Signing!

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



Waiting for JOHN SMITH to start signing...

BORROWER'S CERTIFICATION, AUTHORIZATION AND CONSENT

Loan Number: 777030720220005

Date: March 7, 2023

Provided By: DSI TEST LENDER (SALES)

Borrower: JOHN SMITH

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

CERTIFICATION

The undersigned certify the following:

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

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

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

DocMagic Notary

Restart Meeting

Change Email Address

Withdraw Consent

Terms of Use

Save & Exit

JOHN SMITH

• Signing

DELL



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#2: Fix Incorrectly Tagged Docs While Signing!

Your changes will show.

Currently watching JOHN SMITH

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 purposes of:

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

Sign

Borrower JOHN SMITH _____ Date _____ Borrower _____ Date _____

DocMagic Notary Notary

Recording 00:00:16

DocMagic Notary

JOHN SMITH

Signing

DELL

