



Settlement Agent

Helpful Tips

# SA Helpful Tips

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

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

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. At the top, there are sections for LOAN details (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: eClosing, Package #: 333727, Worksheet #: 1616630796081 (Version: 1)), LENDER information (Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362), and a COUNTDOWN TO CLOSING (0 Days, 6 Hours, 51 Minutes, 26 Seconds, Date: Mar 25, 2021 (Thu), Time: 12:00am PDT). Below these are tabs for Details, Journal, and Action Log, along with a Ready to Close button. The Signers (2) section lists Erica Sample (Borrower) and Sally Settlement (Settlement Agent). The Documents (15) section shows a list of documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Two icons above the document list are highlighted with green boxes: a document with a plus sign and a document with a checkmark. A blue arrow points from the top text box to the plus icon, and another blue arrow points from the bottom text box to the checkmark icon.

#	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	✓

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.



# SA Helpful Tips

## #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 Settlement Agent console. At the top, there's a header with the DocMagic logo and the user's name 'Sally'. Below the header, there are sections for 'LOAN' details (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Title: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1)), 'LENDER' information (Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362), and a 'COUNTDOWN TO CLOSING' timer showing 0 days, 6 hours, 51 minutes, and 26 seconds. A 'Ready to Close' button is visible on the right.

The 'Signers (2)' 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	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, there's a 'Documents (15)' section with a 'Browse' icon highlighted by a green box. An 'Open' file dialog window is overlaid on the console, showing the file explorer with 'AZACPRS.TTL.pdf' selected. The 'Browse' button in the dialog is also highlighted with a green box.



# SA Helpful Tips

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

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

**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

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

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

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



# SA 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 Settlement Agent Portal and fix it.

The screenshot displays a document titled "Closing Documents" with the specific document name "Borrower's Certification, Authorization and Consent". The user is identified as "JOHN SMITH Customer". A "Start signing" button is visible. The document content includes a section titled "BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION" with a list of purposes: (i) providing an offer; (ii) originating, maintaining, managing, monitoring, servicing, selling, insuring, and securitizing a loan; (iii) as otherwise permitted by applicable laws; and (iv) marketing. Below this, there are two paragraphs defining "The Lender" and "The Other Loan Participants". At the bottom of the document, there are two signature lines. The first line is labeled "Borrower JOHN SMITH" and has a red rectangular box around it, with a red arrow pointing to it from a text box below. The second line is labeled "Borrower" and is empty. The interface also shows a sidebar with icons for print, camera, document, user, and info.

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



# SA Helpful Tips

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

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

The screenshot displays the DocMagic eClose Console (Settlement Agent) interface. At the top, there is a purple header with the DocMagic logo and the user's name, Sally. Below the header, the interface is divided into several sections:

- LOAN:** Loan #: 701616630796081, Primary Borrower: Erica Sample, Type: E Closing, Package ID: 33727, Worksheet #: 106630796081 (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, 6 hours, 51 minutes, and 26 seconds. Date: Mar 25, 2021 (Thu), Time: 12:00am PDT.
- Signers (2):** A table with columns: #, 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, Not Started) and Sally Settlement (Settlement Agent, Ready to Sign).
- Documents (15):** A table with columns: #, eSign Enabled, Page(s), Signer(s), and Completed. One document is listed: Uniform Residential Loan Application (9 pages, 1 signer, Completed).

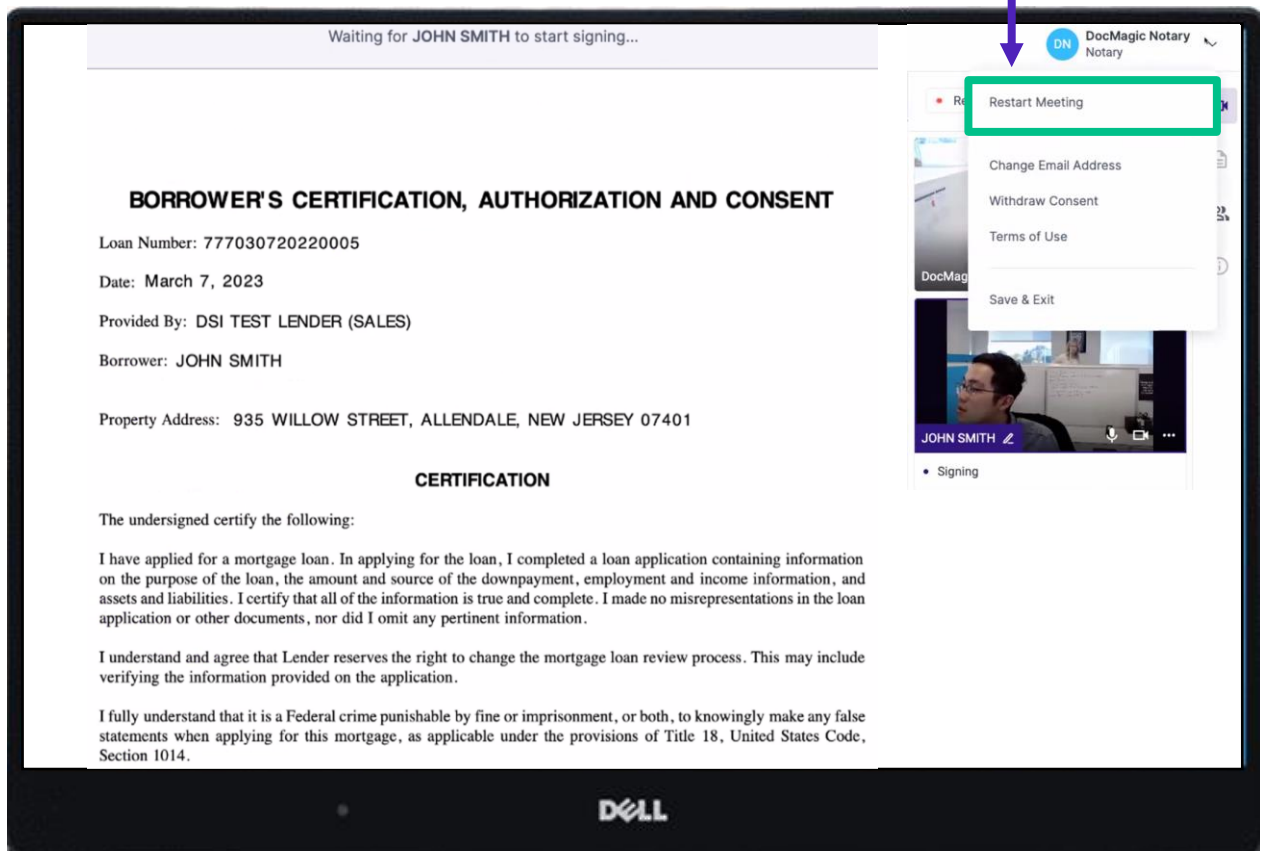
A callout box with a green border and a purple arrow points to a pencil icon in the Documents table, indicating the action to click on to fix incorrectly tagged documents. Below the Documents table, a preview of a document titled "California Deed of Trust (MERS)" is shown, featuring a signature field for John Smith and a notary field.



# SA Helpful Tips

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

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



The screenshot shows a DocMagic Notary signing session. At the top, a status bar reads "Waiting for JOHN SMITH to start signing...". The document content includes:

**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.

On the right side, a participant menu is open for "JOHN SMITH". The menu items are: Restart Meeting (highlighted with a green box), Change Email Address, Withdraw Consent, Terms of Use, and Save & Exit. A video feed of JOHN SMITH is visible below the menu.



# SA Helpful Tips

## #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

Recording 00:00:16

JOHN SMITH

Signing

DELL

