



Total eClose with AutoPrep  
With Settlement Agent Portal and Borrower's Experience

GUIDEBOOK

# Total eClose

Total eClose means a seamless, fully paperless closing process.

## 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



# Total eClose Process

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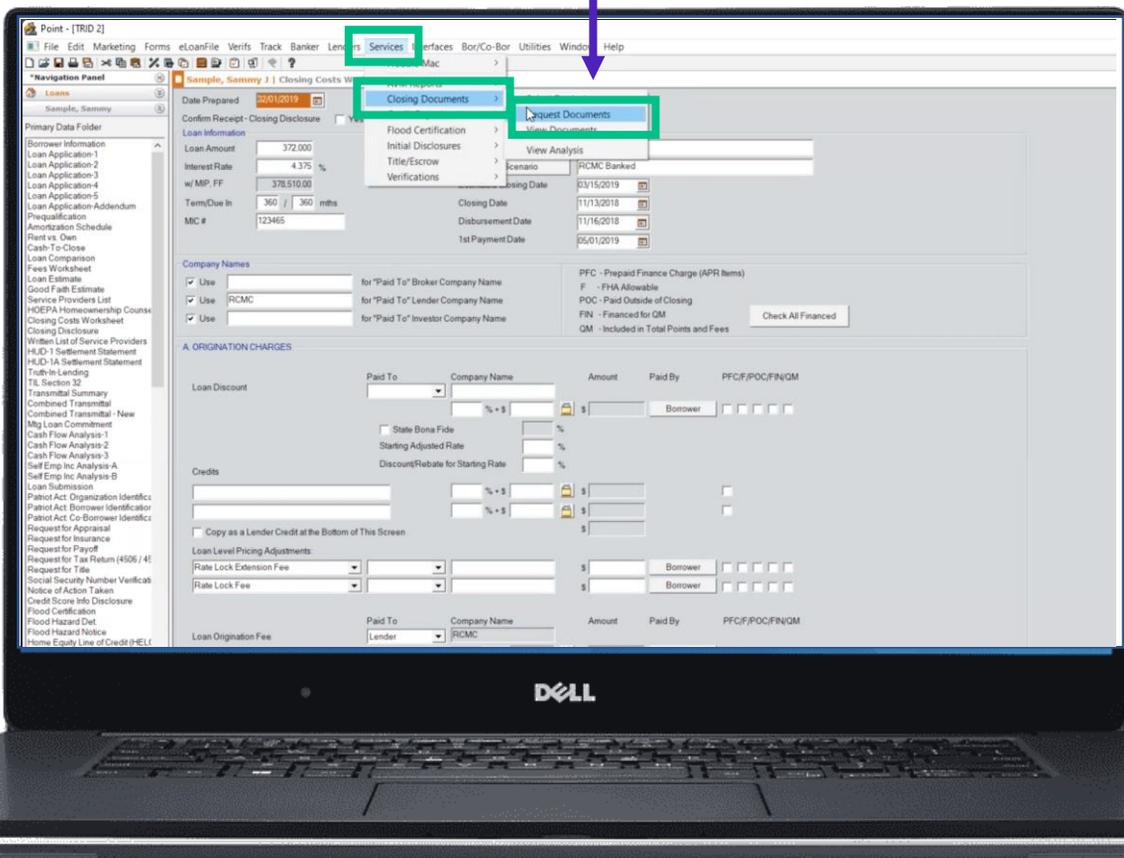




Processing Closing Documents in LOS

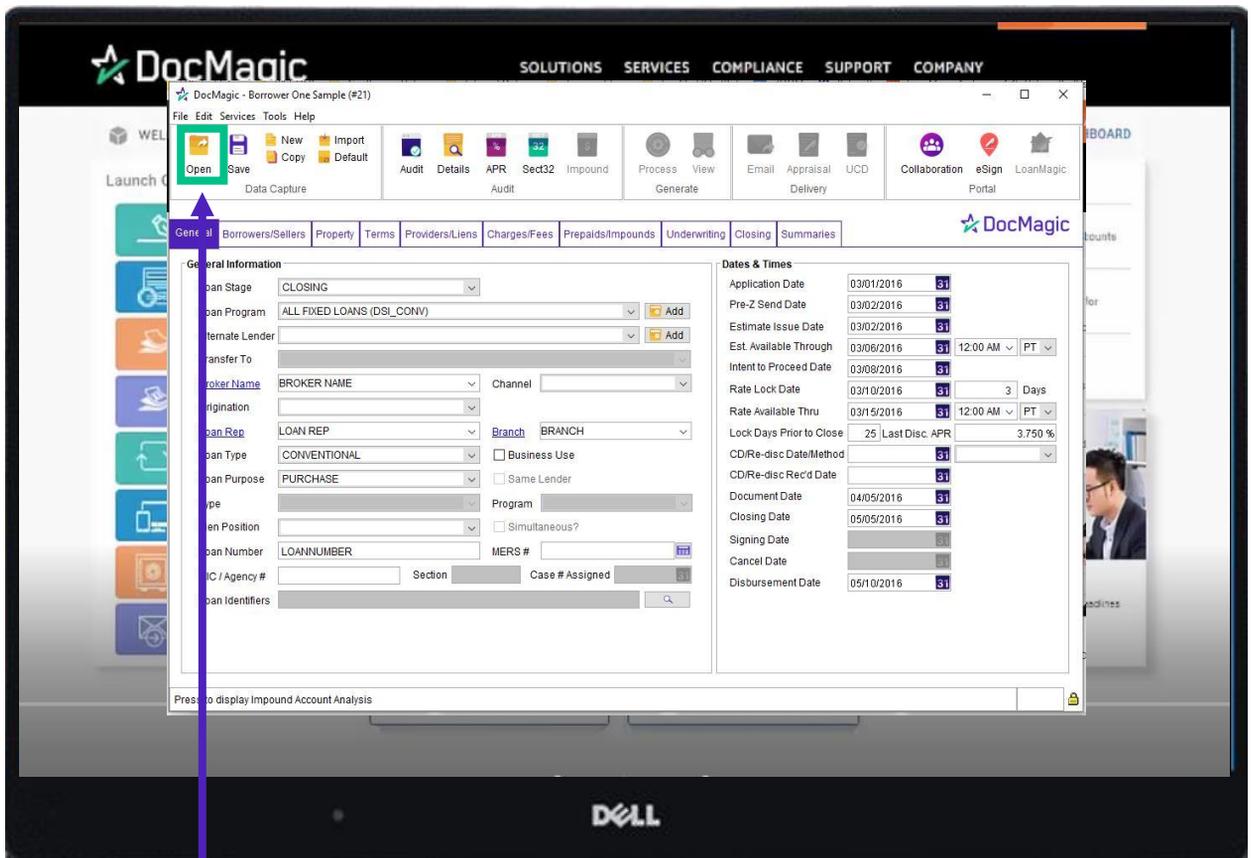
# Closing Documents in Your LOS

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



# Closing Documents in Your LOS

If your LOS does not allow for eNote and 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, Email, Appraisal, 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**

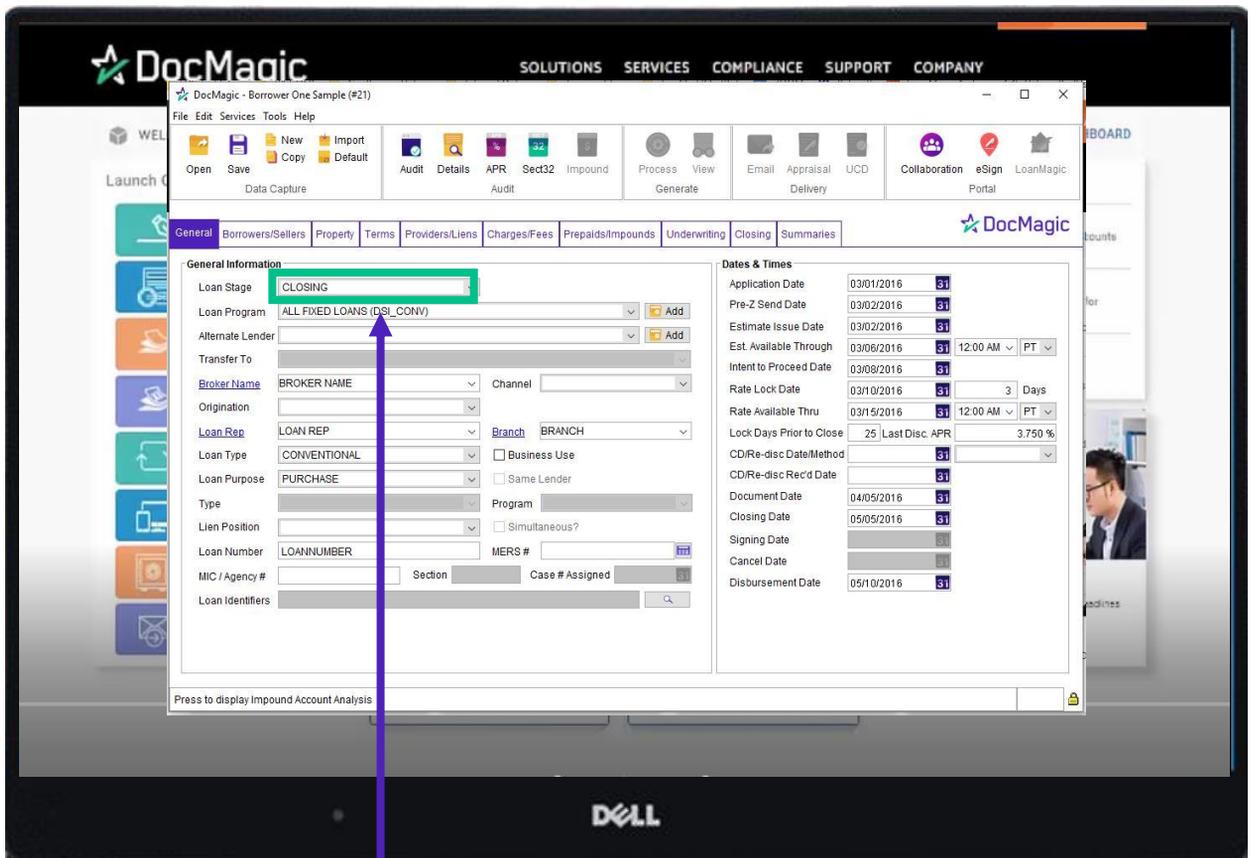
Application Date	03/01/2016	31
Pre-Z Send Date	03/02/2016	31
Estimate Issue Date	03/02/2016	31
Est. Available Through	03/06/2016	12:00 AM PT
Intent to Proceed Date	03/08/2016	31
Rate Lock Date	03/10/2016	31
Rate Available Thru	03/15/2016	12:00 AM PT
Lock Days Prior to Close	25	Last Disc. APR 3.750 %
CD/Re-disc Date/Method		31
CD/Re-disc Rec'd Date		31
Document Date	04/05/2016	31
Closing Date	05/05/2016	31
Signing Date		31
Cancel Date		31
Disbursement Date	05/10/2016	31

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

Transaction Details      Data Validation      Compliance Audit      Collapse all

**DETAILS**

**LENDER INFO**

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

**LOAN IDENTIFIERS**

Loan Number: 777012520220001      FHA/VA 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
\$0.00
\$100.00
\$250,000.00
\$100.00
\$249,900.00



# Processing Documents – Total eClose

Process the Document set to choose your Total eClose Option.

The screenshot shows the DocMagic software interface. A 'Data Validation' window is open, displaying a table of 8 warning issues and 2 messages. The 'Process' button in the window's toolbar is highlighted with a green box. A blue arrow points from the text above to this button. The background window shows a loan document with sections for 'Due from Borrower at Closing' and 'Paid Already by or on Behalf of Borrower'. The 'CALCULATION' section at the bottom shows the following values:

Description	Amount
Total Due Already from Borrower at Closing	\$250,000.00
Total Paid by or on Behalf of Borrower	\$100.00
Cash to Close From/To Borrower	\$249,900.00



# Processing Documents – Total eClose

Choose "Closing" for Package Type.

Worksheet #22 (SAMPLE) is queued for processing.

**General Options**

Package Type: Closing

File Format:  Adobe PDF  DBK (PCL)

**Loan Application**

FNMA 3.x File:  Browse

**Electronic Delivery**

DocMagic eSign Edit

eSignature enable

eNotary enable  Include SMARTDoc eNote

Send to Mobile App

Event Notification

E-Mail Secure Link to

**Security**

Require Password

Retrieval Notification

Disable Recipient Printing

**Additional Services**

Print and Deliver Enter Delivery Information

Flood Certification Life of Loan?  Yes  No

MERS Registration

Process Cancel

Check all four boxes for Total eClose.

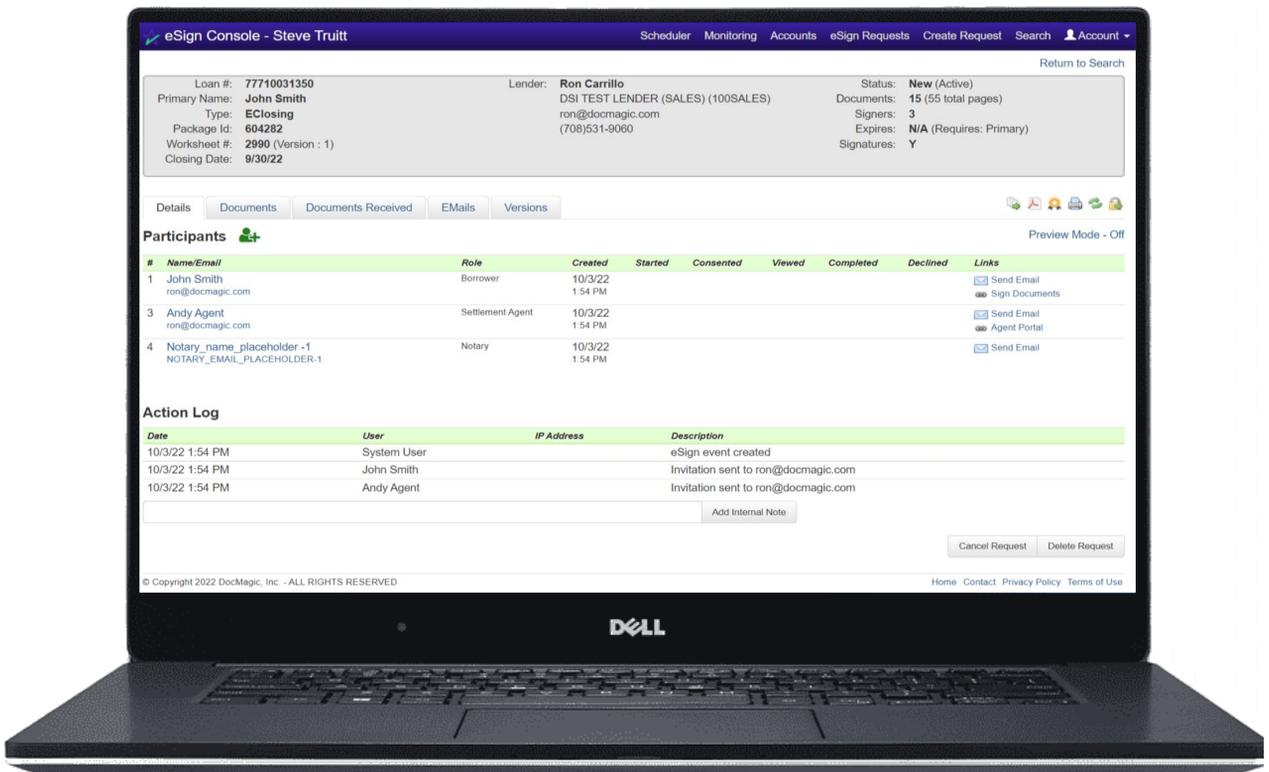




Lender Portal

# 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.

**eSign Console - Steve Truitt** Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Return to Search

Loan #: 77710031350 Lender: Ron Carrillo Status: New (Active)  
Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES) Documents: 15 (55 total pages)  
Type: EClosing ron@docmagic.com Signers: 3  
Package Id: 604282 (708)531-9060 Expires: N/A (Requires: Primary)  
Worksheet #: 2990 (Version : 1) Signatures: Y  
Closing Date: 9/30/22

Details Documents Documents Received EMail Versions

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith ron@docmagic.com	Borrower	10/3/22 1:54 PM						<a href="#">Send Email</a>
3	Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						<a href="#">Send Email</a> <a href="#">Agent Portal</a>
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	10/3/22 1:54 PM						<a href="#">Send Email</a>

Action Log

Date	User	IP Address	Description
10/3/22 1:54 PM	System User		eSign event created
10/3/22 1:54 PM	John Smith		Invitation sent to ron@docmagic.com
10/3/22 1:54 PM	Andy Agent		Invitation sent to ron@docmagic.com

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# Lender Portal

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

The screenshot shows 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.

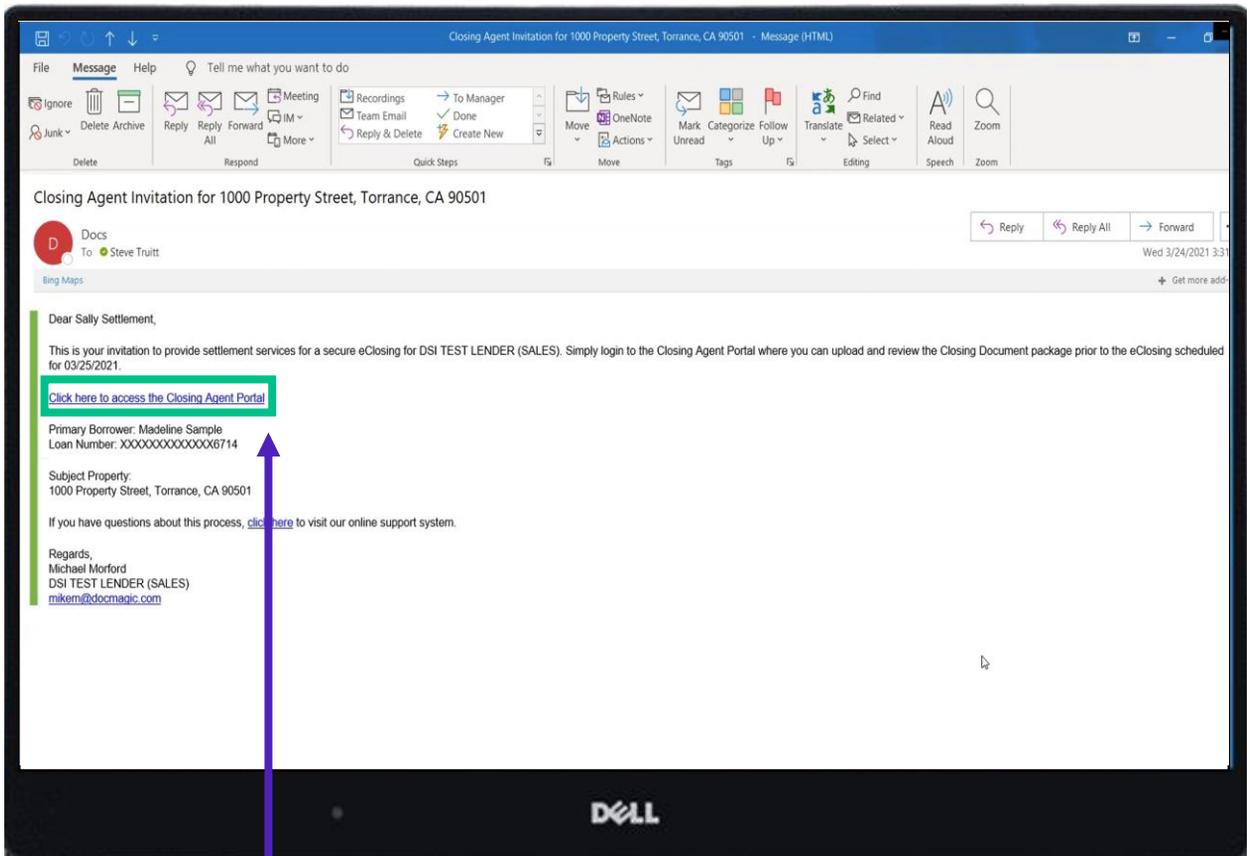
You can check the status of the signature process here.





# Settlement Agent Invitation Email

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

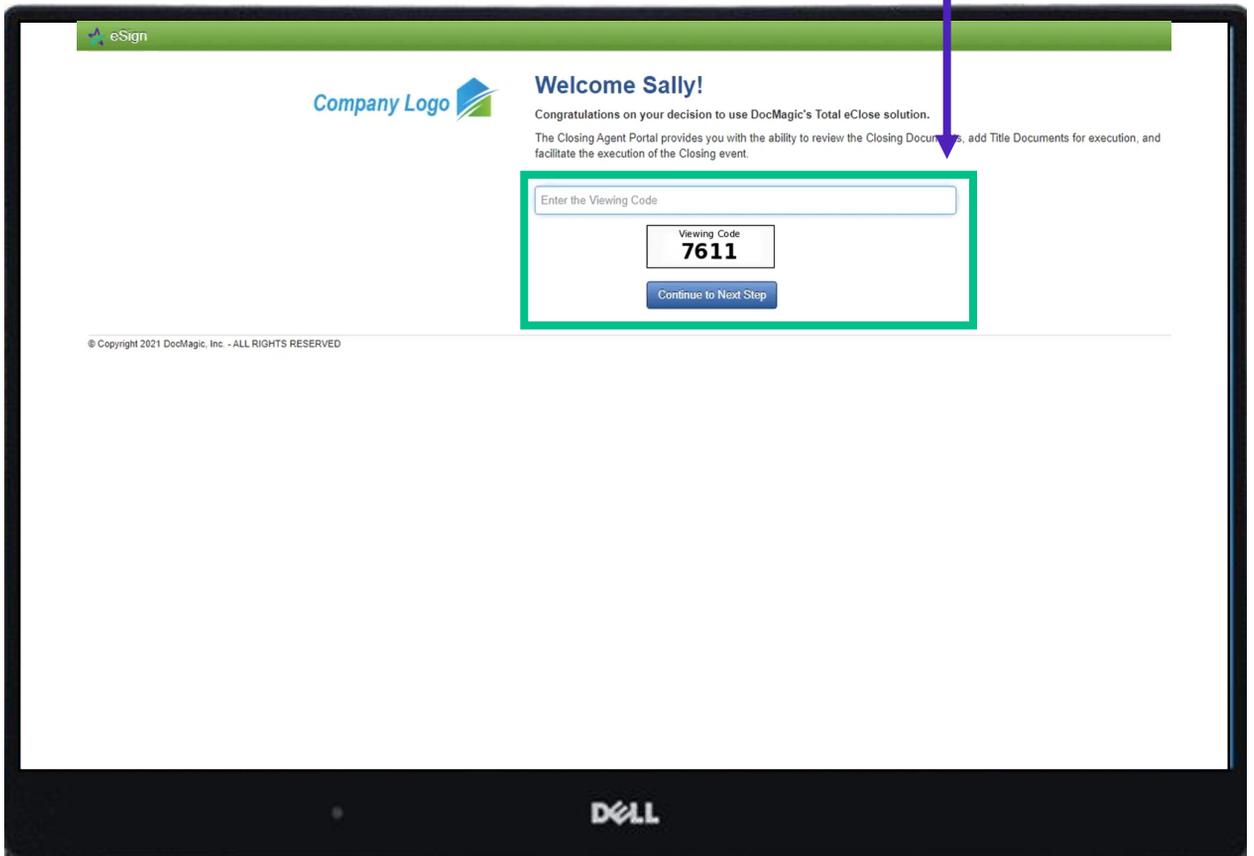


This link, along with the email is specific to this particular transaction.



# 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 digital clock showing 0 Days, 6 Hours, 51 Minutes, and 26 Seconds. Date: Mar 25, 2021 (Thu), 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)

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

**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	📧 ⦿	📷 ⦿
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned			

**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	✓



# 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 'Signers (2)' section is highlighted with a green box and 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	<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 table showing document details:

#	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 in a green box. The "Documents (15)" list is also visible, showing various documents related to the loan.



# 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 for the following information:

- First Name:
- Last Name:
- Email:
- Phone Number:
- Access Code:
- Role:

At the bottom of the dialog box, there are 'Cancel' and 'Add' buttons. The 'Add' button is highlighted with a green box. In the background, the 'Signers (2)' list shows two participants: Erica Sample and Sally Settlement. The 'Documents (15)' list shows various documents with their respective page counts and completion status.

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			● 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'. Below the navigation bar, there are sections for 'LOAN' details (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1)), 'LENDER' information (Company: DOSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362), and a 'COUNTDOWN TO CLOSING' widget showing 0 days, 0 hours, 0 minutes, and 0 seconds, with a date of Apr 19, 2023 (Wed) and time of 12:00am PDT. Below these are tabs for 'Details', 'eJournal', and 'Action Log', along with a 'Ready to Close' button. 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 table is 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	✓



# 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.

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'. Below the navigation bar, there are three main sections: 'LOAN' details (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: 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' widget showing 0 days, 0 hours, 0 minutes, and 0 seconds, with a date of Apr 19, 2023 (Wed) at 12:00am PDT. Below these sections are tabs for 'Details', 'eJournal', and 'Action Log', along with a 'Ready to Close' button. The 'Signers (2)' section contains a table with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, and Status. Two signers are listed: Erica Sample (Borrower, Not Started) and Sally Settlement (Settlement Agent, Ready to Sign). A 'Preview Mode' toggle is located in the bottom right of the signers section, currently set to 'ON'. Below the signers is a 'Documents (15)' section with a table listing documents such as 'Uniform Residential Loan Application', 'MERS California Deed of Trust', and 'California Hazard Insurance Disclosure'. The Dell logo is visible at the bottom center of the screen.

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	Sign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉️ ⓪	📄 ⓪	● Not Started	Get Signer Room View Signer Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	View Signer 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

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 for a Settlement Agent. The top navigation bar includes the DocMagic logo, the user name 'Sally', and the role 'Settlement Agent'. 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, with a date of Apr 19, 2023 (Wed) and time of 12:00am PDT.
- Signers (2):** A table listing two signers: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing 15 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.

#	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	✓



# Documents Section

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

**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

**Signers (2)**

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

**Documents (15)** | Preview Mode: ON

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



# 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 displays the DocMagic eClose Console interface for a Settlement Agent. The main area shows a list of 14 documents with their respective page counts and completion status. A green box highlights the 'Print and Sign' section at the bottom, which lists documents that require wet signatures. A blue arrow points from the text box above to this section.

#	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	✓

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



# 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".

Key sections of the interface include:

- LOAN Details:** Loan # 777-1616630796081, Primary Borrower Erica Sample, Type 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.
- COUNTDOWN TO CLOSING:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds, with a date of Apr 19, 2023 (Wed) and time of 12:00am PDT.
- Signers (2):** A table listing Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing various documents such as "Uniform Residential Loan Application", "MERS California Deed of Trust", and "California Hazard Insurance Disclosure".

A blue arrow points from the text box to a document icon (a blue square with a white document symbol) 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	✉️ ⓪	📄 ⓪	● 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

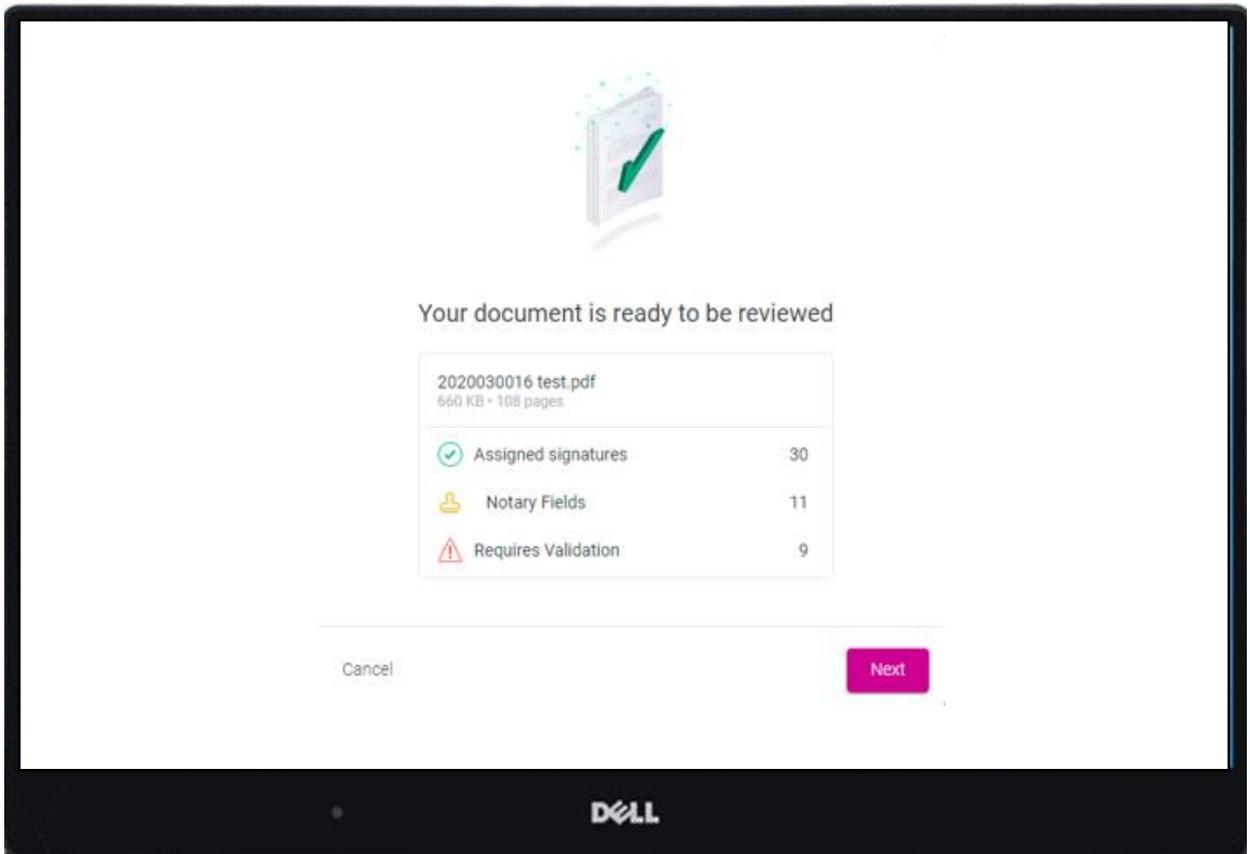
Click the Browse button to navigate to the document you would like to add to the package.

The screenshot displays the DocMagic eClose Console interface. At the top, the user is identified as Sally. The console shows loan details for Loan # 777-1616630796081, with Primary Borrower Erica Sample and Package ID 333727. The lender is DSI TEST LENDER (SALES), with contact Michael Morford. A countdown timer shows 0 days, 0 hours, 0 minutes, and 0 seconds remaining until closing on April 19, 2023, at 12:00am PDT. A document list is visible at the bottom, including items like California Hazard Insurance Disclosure and Borrower Consent to the Use of Tax Return Information. An 'Open' file dialog box is overlaid on the console, showing the Desktop directory with a list of files. The file 'AZACPRS.TTL.pdf' is selected. A green box highlights the 'Browse' button in the dialog, with a blue arrow pointing from the instruction text above to this button.



# 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 with two signature lines. The top signature line is associated with a green checkmark icon, indicating it is correctly assigned. The bottom signature line is associated with a red warning icon, indicating it is not assigned. A dropdown menu is open for the bottom signature line, showing a list of potential signers: Sammy Sample (Borrower 1), Sally Sample (Borrower 2), To be determined (Notary), and Belinda Helmick (Settlement Agent). The bottom signature line is currently labeled 'Borrower SALLY SAMPLE' and 'Date'.

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

proved to me on the basis of satisfactory evidence to be the person(s) w

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, which is highlighted in green. Below this, there is a line for "BORROWER - Terry M Mackey - DATE -". Further down, there are fields for "State of \_\_\_\_\_" and "County of \_\_\_\_\_". The text "This instrument was acknowledged before me on \_\_\_\_\_ by Terry M Mackey." is followed by a dropdown menu with "Notary" selected, which is highlighted in blue. Below this, there is a field for "Notary Public" and "My Commission Expires: \_\_\_\_\_". A plus sign icon 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. At the top, the DocMagic logo is visible. Below it, the document title "2020030016 test.pdf" is shown. The main content area contains a loan agreement document with several fields. A green callout bubble with a pencil icon points to a dropdown menu containing "Terry M Mackey (Borrower 1)". Another blue callout bubble with a pencil icon points to a dropdown menu containing "Notary". A third blue callout bubble with a plus sign icon points to a plus sign button in the bottom right corner of the document area. On the right side, a purple "Done" button is at the top. Below it is a toolbox with three sections: "Signature Fields" (containing "Signature" and "Initial" options), "Notary Fields" (which is currently collapsed), and "PostFill" (containing "Textbox", "Checkbox", and "Date" options). A green box highlights the plus sign button in the bottom right corner of the document area.



# AutoPrep

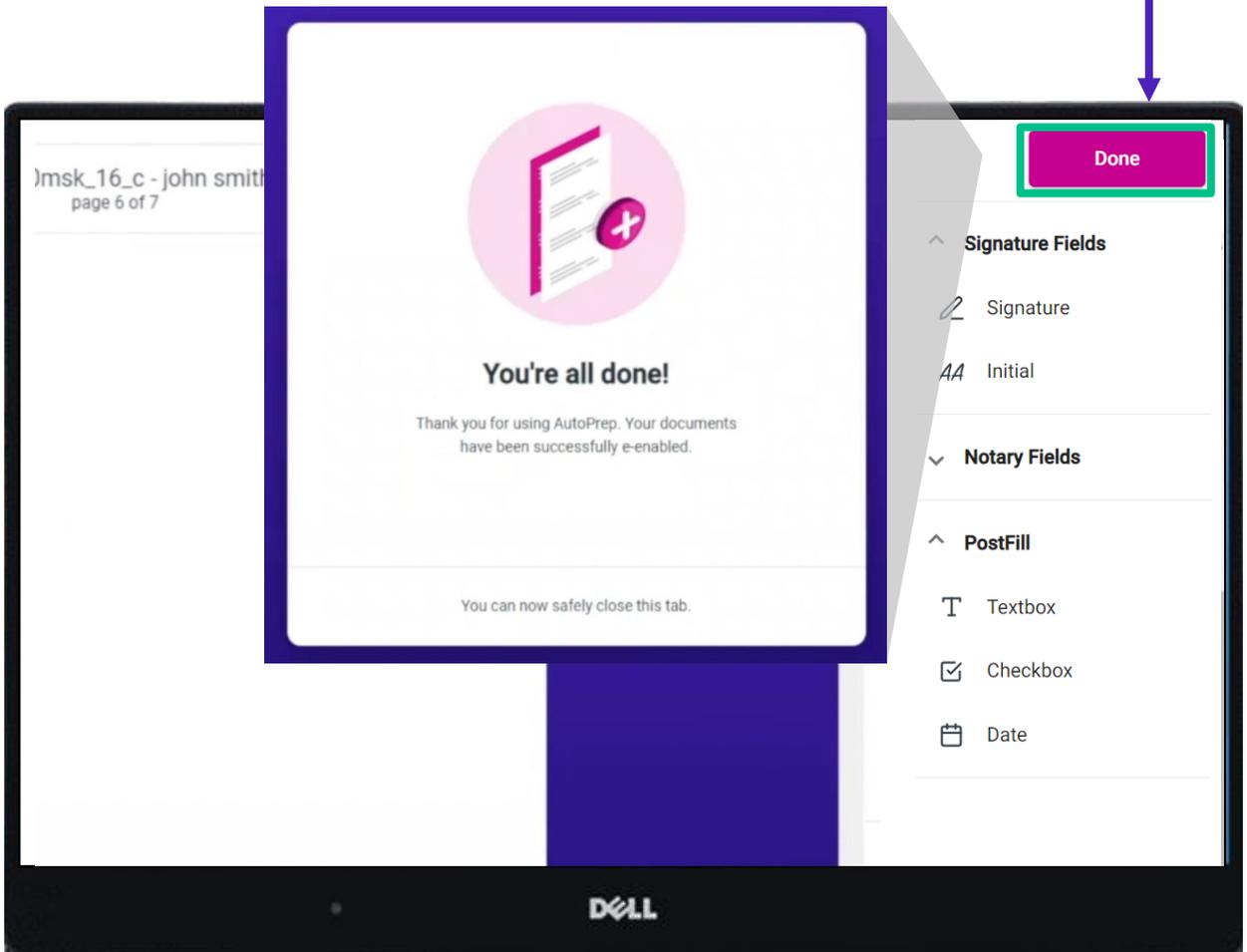
It is crucial that you assign fields correctly and fix wrongly identified fields every time so the system can learn from your edits.

The screenshot displays a document with several fields being assigned to a menu. The document text includes: "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", and "My Commission Expires:". A menu on the right side of the screen is titled "Done" and contains the following sections: "Signature Fields" (with options for "Signature" and "Initial"), "Notary Fields", and "PostFill" (with options for "Textbox", "Checkbox", and "Date"). A green box highlights the "Signature Fields" and "PostFill" sections. A purple arrow points from the text box above to the "Signature" option in the menu. Another purple arrow points from the text box above to the "Notary" field in the document. A third purple arrow points from the text box above to the "Notary Public" field in the document. A fourth purple arrow points from the text box above to the "My Commission Expires" field in the document. A fifth purple arrow points from the text box above to the "Date" option in the menu.



# 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.

**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](#)  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	✓

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.*

The screenshot displays the DocMagic eClosing Console (Settlement Agent) interface. At the top, there are sections for LOAN, LENDER, and SETTLEMENT AGENT. Below these 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. A red box highlights a pencil icon in the 'Documents (6)' section, which is linked to a document editor window. The document editor shows a 'California Deed of Trust (MERS)' document with a 'BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION' section. The document editor also has a 'Tags' sidebar 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 strullt@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@mailnat...	Originator					● Ready to Sign	<input type="button" value="Open Signing Room"/>
3	Sally Settlement strullt@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	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 the purposes 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: \_\_\_\_\_

**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 the tabs, there is a 'Journal' section with a table of journal entries. The first entry is for John Smith, Notarization Date and Time November 9, 2021 • 10:32am PST. A green box highlights a down arrow icon next to this entry. Below the journal is a 'Recordings' section with a table of recordings. The first recording is for file 417659\_2021-11-09T18:27:54.132Z.mp4, Date Recorded November 9, 2021 • 10:27am PST, with a download icon.

#	Signer	Notarization Date and Time
1	John Smith	November 9, 2021 • 10:32am PST

#	File	Date Recorded
1	417659_2021-11-09T18:27:54.132Z.mp4	November 9, 2021 • 10:27am PST

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.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar shows the user '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**: Tabs for Details, eJournal, and Action Log (highlighted with a green box).
- Action Log Table**:

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
- Footer**: A text input field with a button labeled 'Add Internal Note To Action Log'.

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 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, Not Started) and Sally Settlement (Settlement Agent, Ready to Sign).
- Documents (15):** A toolbar with icons for document actions, including a printer icon highlighted in a green box. Below the toolbar is a table with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are listed, all with 'Completed' status.

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 table lists 14 documents with their respective page counts and completion status. The bottom row, 'Multistate Fixed Rate Note', is highlighted with a green border and a green checkmark in the 'Completed' column. A blue arrow points from the text box above to this row.

#	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 value.
- 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 request, including the closing date and time.
- Buttons:** "Cancel" and "Assign Notary" buttons at the bottom.

The background interface shows a loan summary on the left, a list of documents, and a right-hand panel with a timer and "Assign Notary" button. A purple arrow points from the text box above to the "Assign Notary" button in the right-hand panel.

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 2 signers:

#	Name	Email	Role	Phone
1	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: [ ] AM 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 "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**  
WWN

**\*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" field is highlighted with a green box, showing "Remote Online Notary" selected. The "Request Summary" section indicates "1 participants for a RON eClosing for a property in Torrance, CA." and shows the "Estimate Closing Date" as 3/25/2021 at 12:00 AM in the America/Los Angeles time zone. The "Signers" table lists two signers: Erica Sample (Borrower) and Sally Settlement (Settlement Agent). The "Documents" table lists 16 documents, including Uniform Residential, MERS California Deed, Specific Closing Instructions, California Hazard Insurance, Hazard Insurance Authorization and Requirements, and Borrower Consent to the Use of Tax Return Information.

#	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' dialog box within the DocMagic eClose Console. The dialog 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 and highlighted by a green box.
- Notary Type:** A section with a red asterisk indicating it is required. It contains two radio buttons: 'In Person' (unselected) and 'Remote Online Notary' (selected).
- Signers:** A table listing the participants in the closing.
- Request Summary:** A section with a red asterisk indicating it is required. It contains a text box with '1 participants for a RON eClosing for a property in Torrance, CA.' and a form for closing details: 'Estimate Closing Date' (3/25/2021), 'Time' (12:00 AM), and 'America/Los Angeles'. This section is highlighted by a green box.
- Buttons:** 'Cancel' and 'Assign Notary' buttons are located at the bottom of the dialog. The 'Assign Notary' button is highlighted by a green box.

The background shows the eClose Console interface with a purple header, a sidebar with 'LOAN' and 'Details' tabs, and a main area with 'Signers (2)' and 'Documents (16)' sections. A 'DELL' logo is visible at the bottom center of the screen.

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
			TEST

City County State Zip  RON Capable **Search**

	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

**Cancel** **Request Notary Services**

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.

The screenshot displays the 'Assign / Notify Notary' window in the DocMagic eClose system. The window is divided into several sections:

- Loan Information:** Loan #: 777-1, Primary Borrower: Erica, Type: EClose, Package ID: 3337, Worksheet #: 1616.
- Search Form:** Includes fields for Company Name, First Name, Last Name, Client ID (TEST), City, County, State (MD), and Zip. A 'Search' button is present.
- Notary Type:** Radio buttons for 'In Person' and 'Remote Online Notary (RON)' (selected).
- Search Results Table:** A table with columns for Notary Name, Email, and status. The third row is selected with a radio button.
- Request Summary:** Shows '1 participants for a RON eClosing for a property in Sample, NJ.' and fields for 'Estimate Closing Date' (12/21/2022), 'Time' (01:00 PM), and 'America/Los Angeles'.
- Buttons:** 'Cancel' and 'Request Notary Services' buttons are at the bottom.

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

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**  
 In Person  
 Remote Online Notary (RON)

**Search**

Company Name	First Name	Last Name	Client ID
			TEST

City County State Zip  RON Capable Search

MD

**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

Cancel      Request Notary Services

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".

**LOAN** section:

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

**LENDER** section:

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

**COUNTDOWN TO CLOSING** section:

- Days: -
- Hours: -
- Minutes: -
- Seconds: -
- Date: Apr 19, 2023 (Wed) Time: 12:00am PDT
- Edit

A blue arrow points from the text box to the "Ready to Close" button in the bottom right corner of the interface.

**Signers (2)** section:

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

**Documents (16)** section:

#	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 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.

**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

**Signers (2)**

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

**Documents (16)**

#	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  off

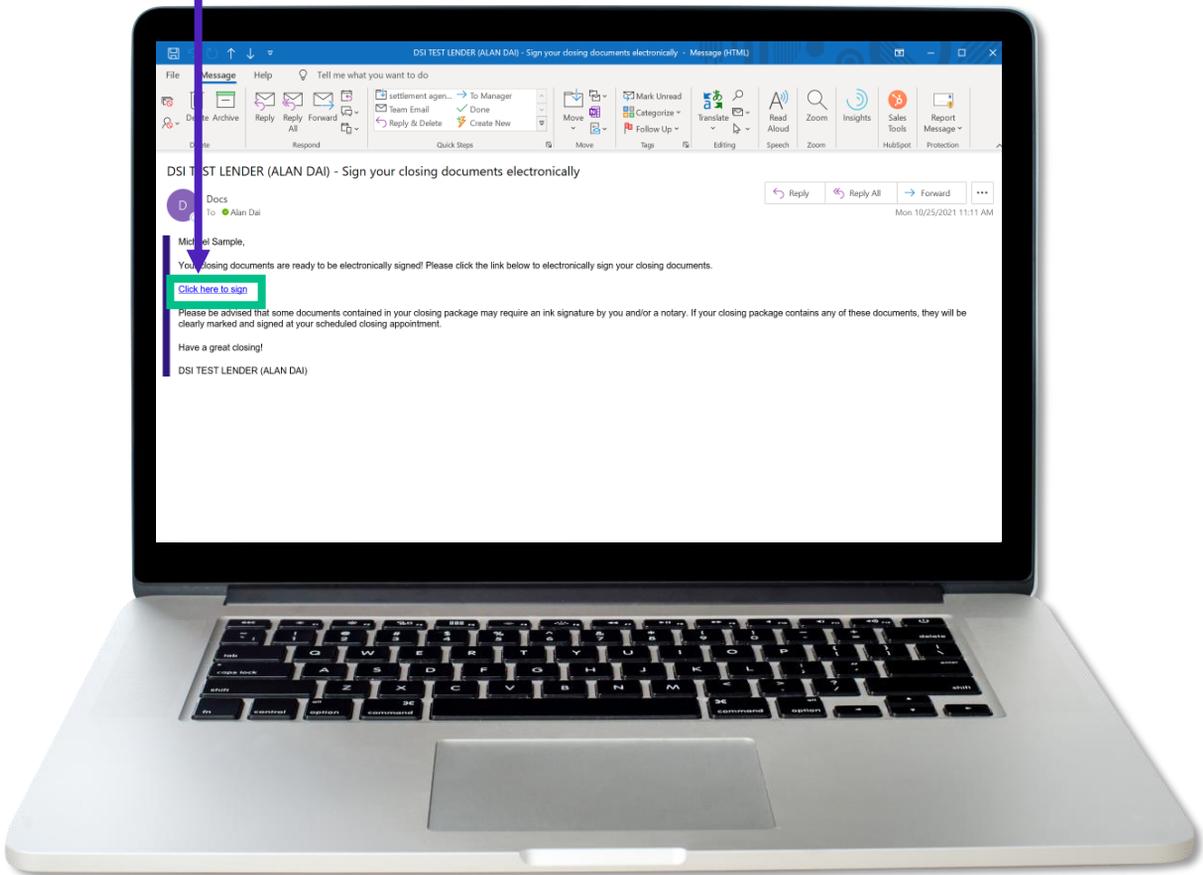




V3 Signing (Borrower's Experience)

# 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.

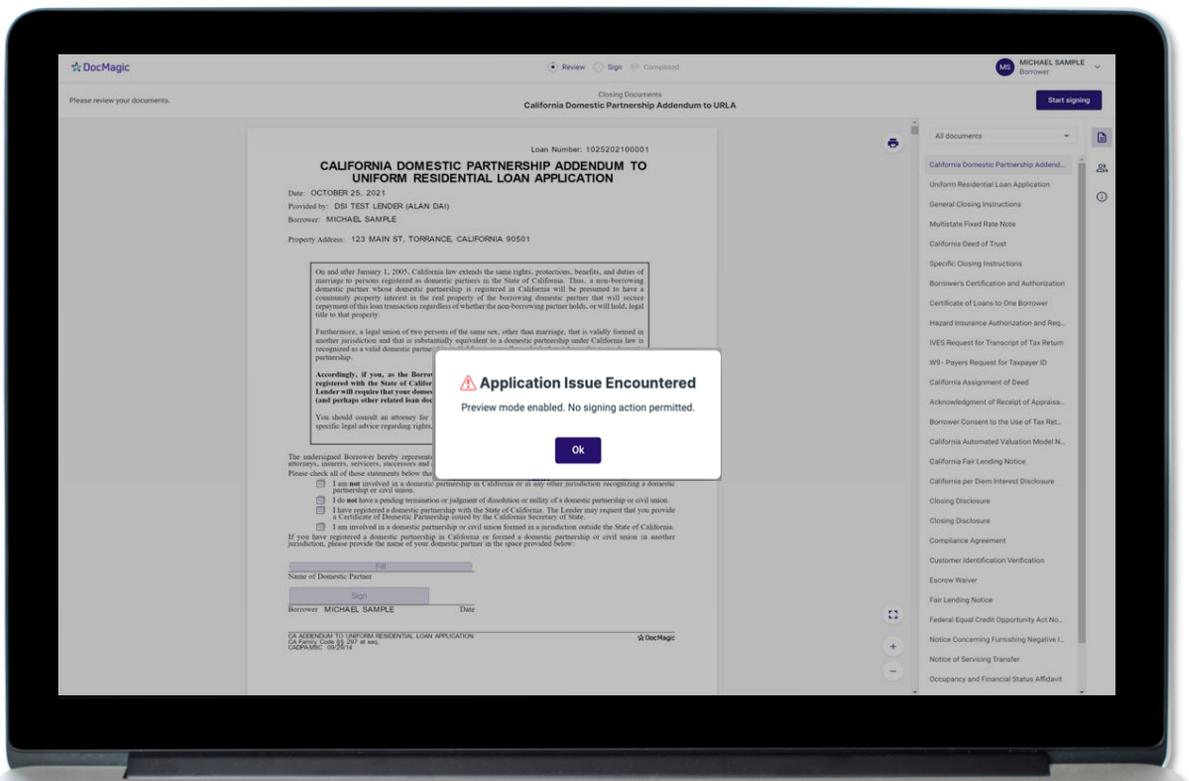
Get Started

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.

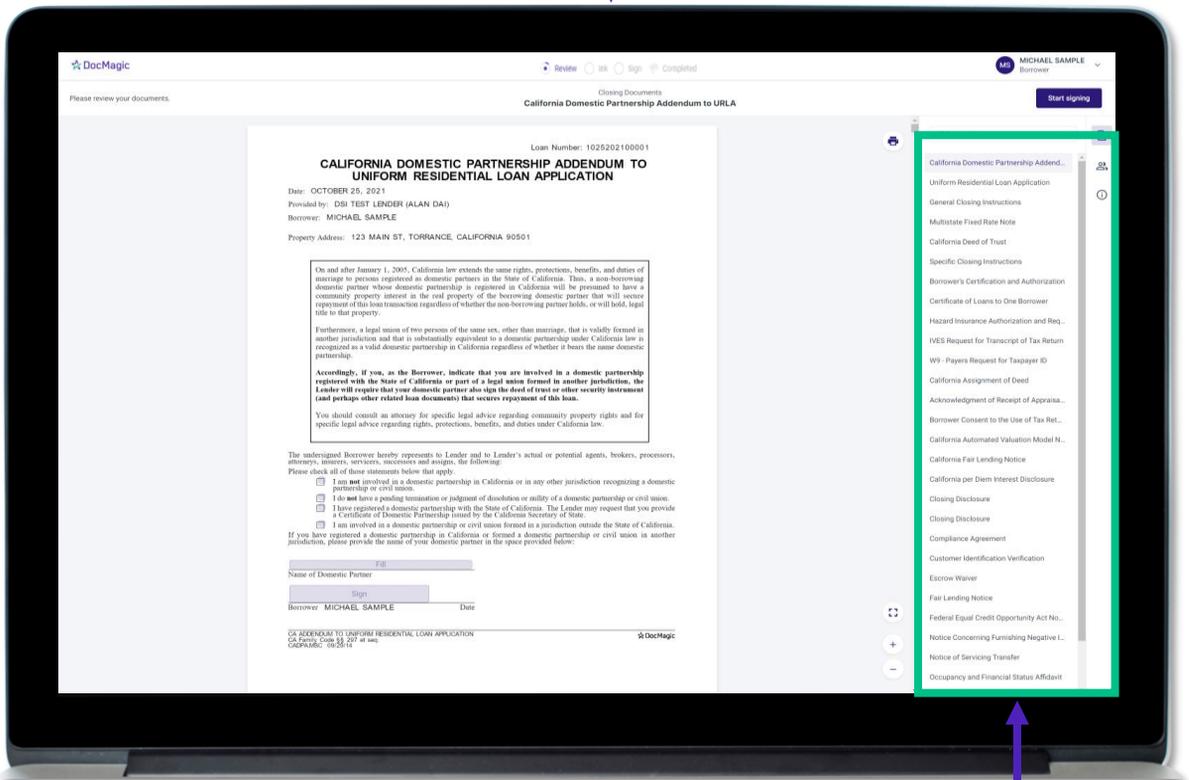


If repeated technical glitches occur, try clearing browser cache or running the experience in an incognito window.



# Page Features

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

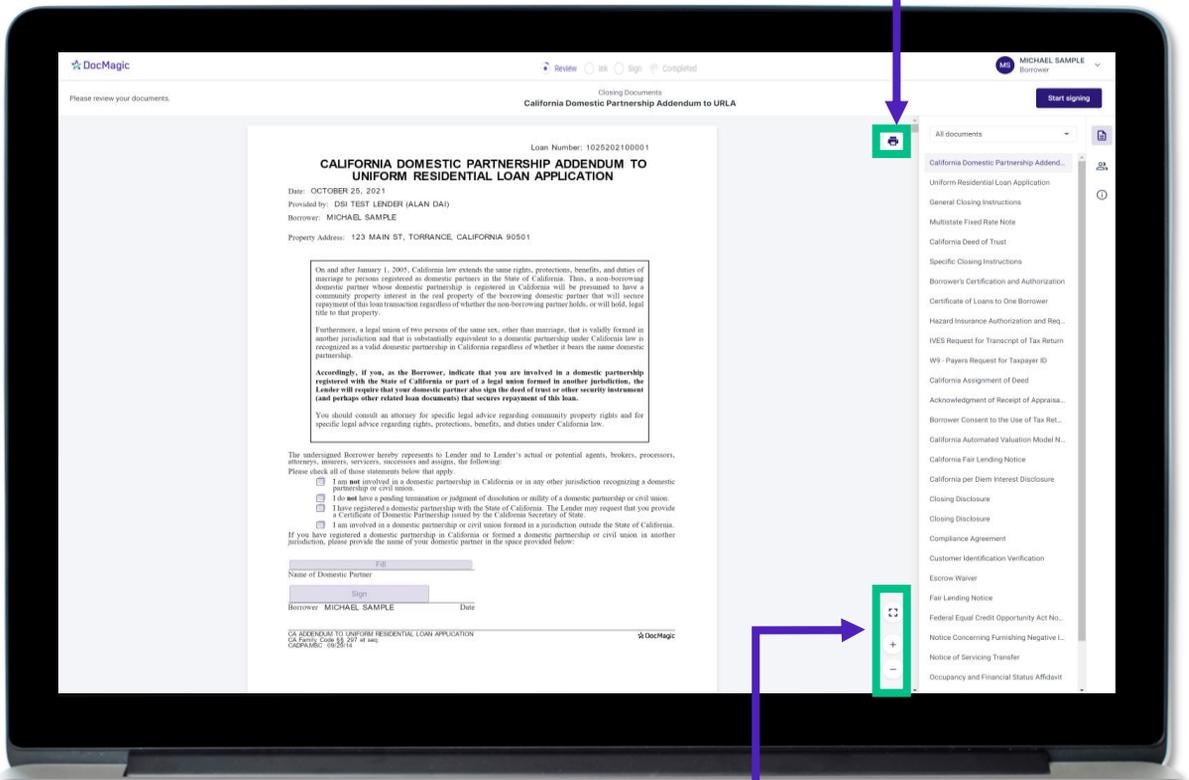


All documents are listed in this column on the right.



# Page Features

The print icon allows you to print the documents.

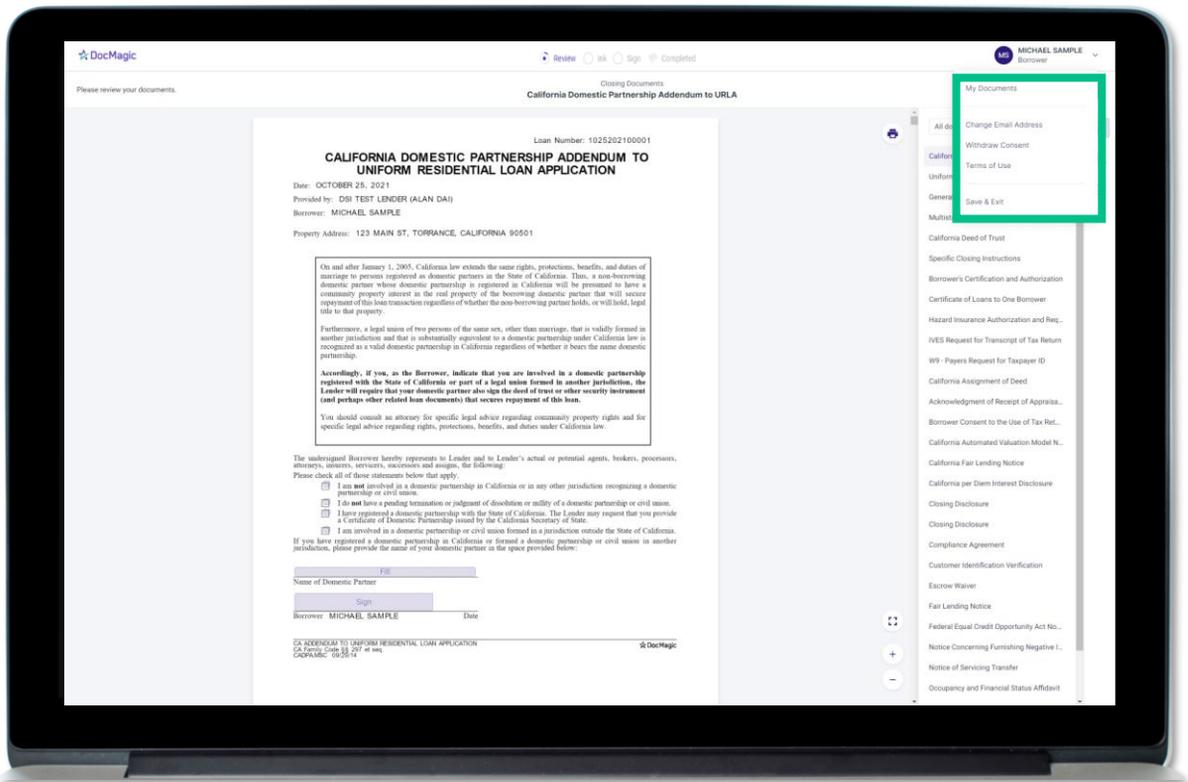


You can expand the signing window and increase or decrease the zoom levels.

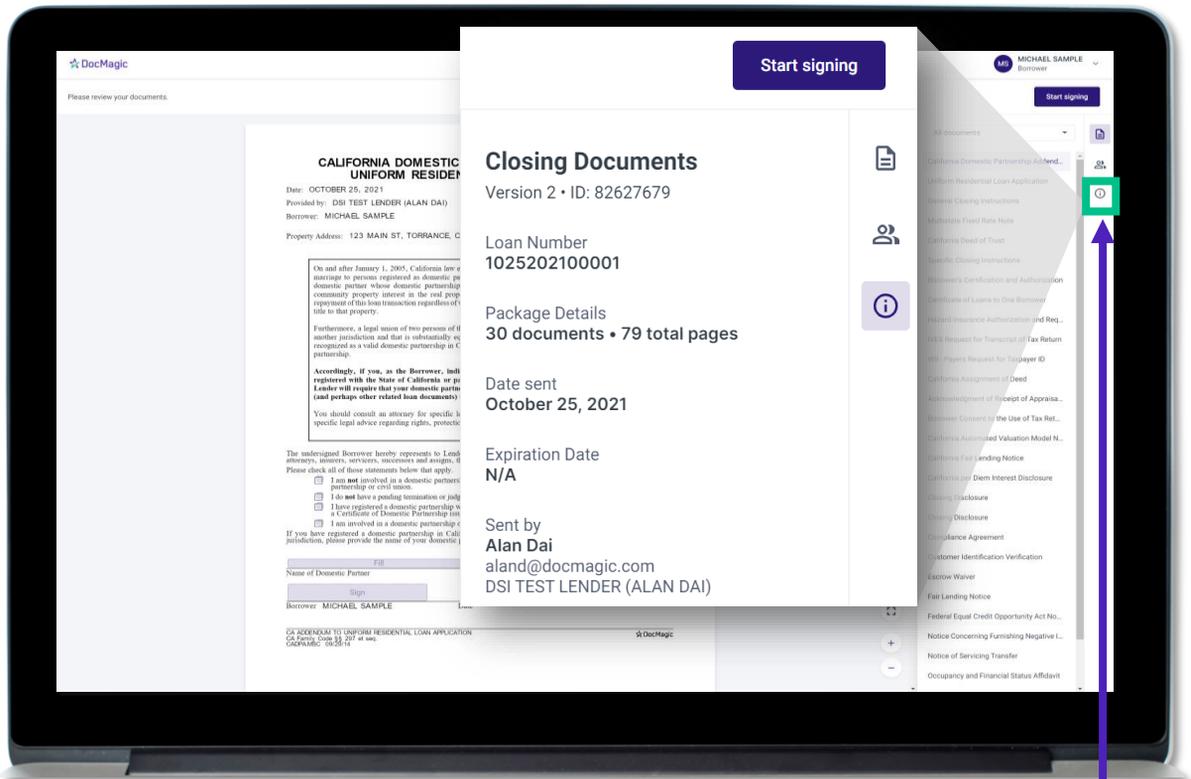


# Borrower Information

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



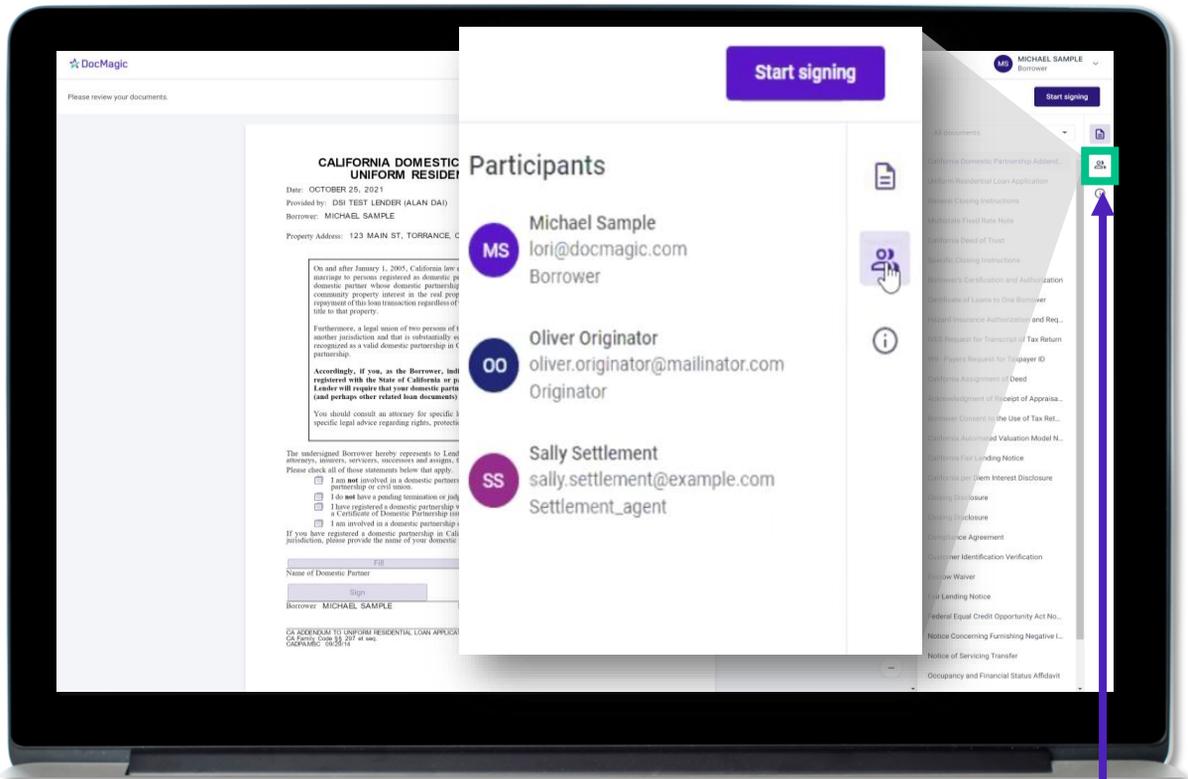
# Document Information



This button lists the document information.



# Participants

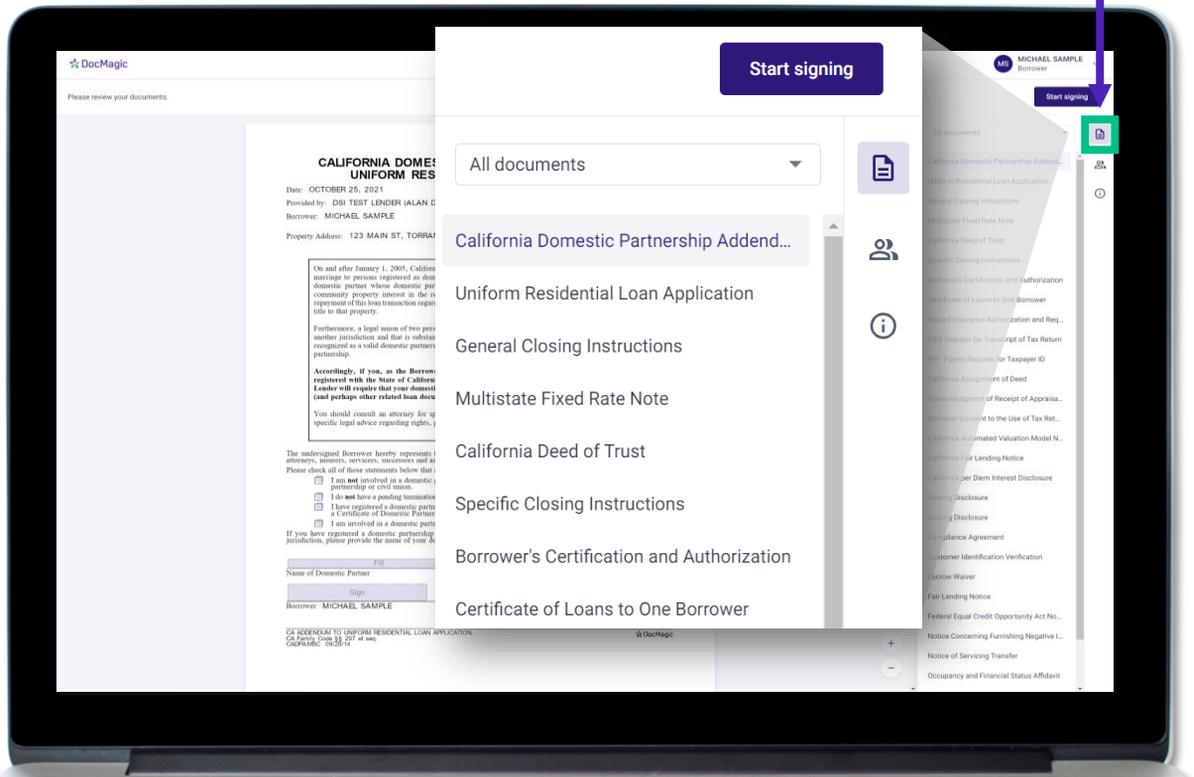


This button lists the participants.



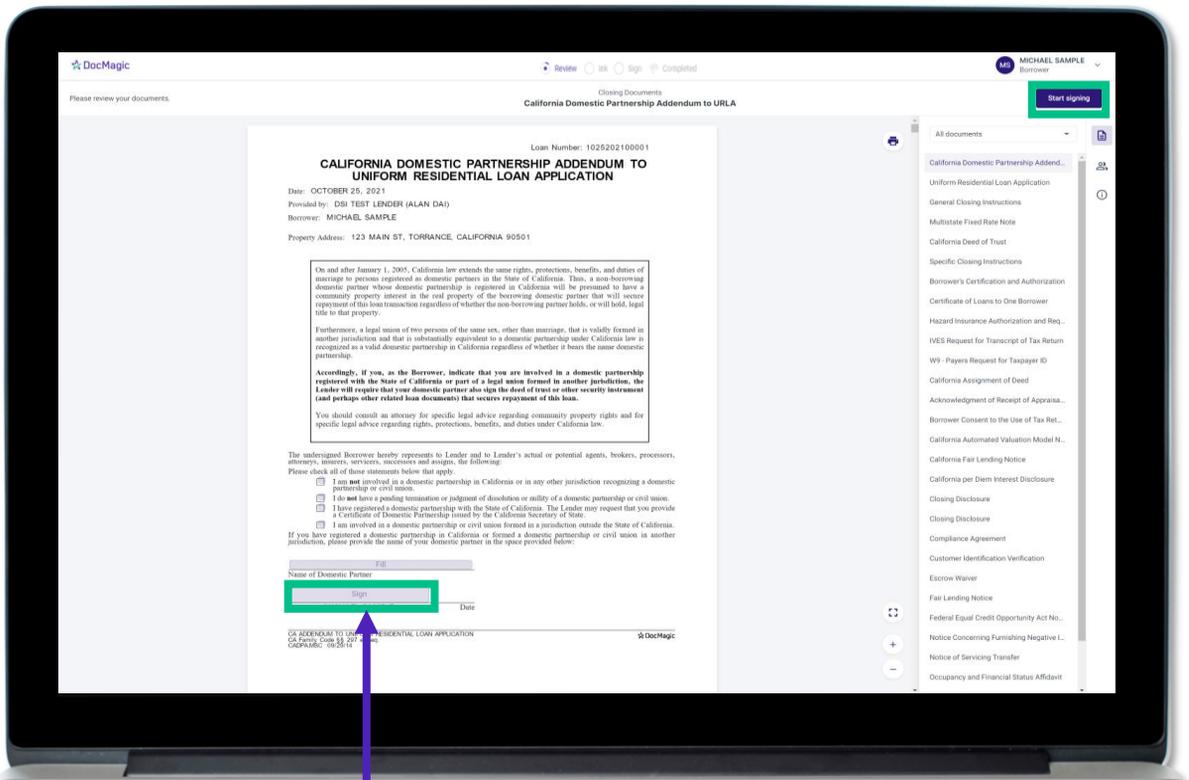
# Return to Documents List

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.

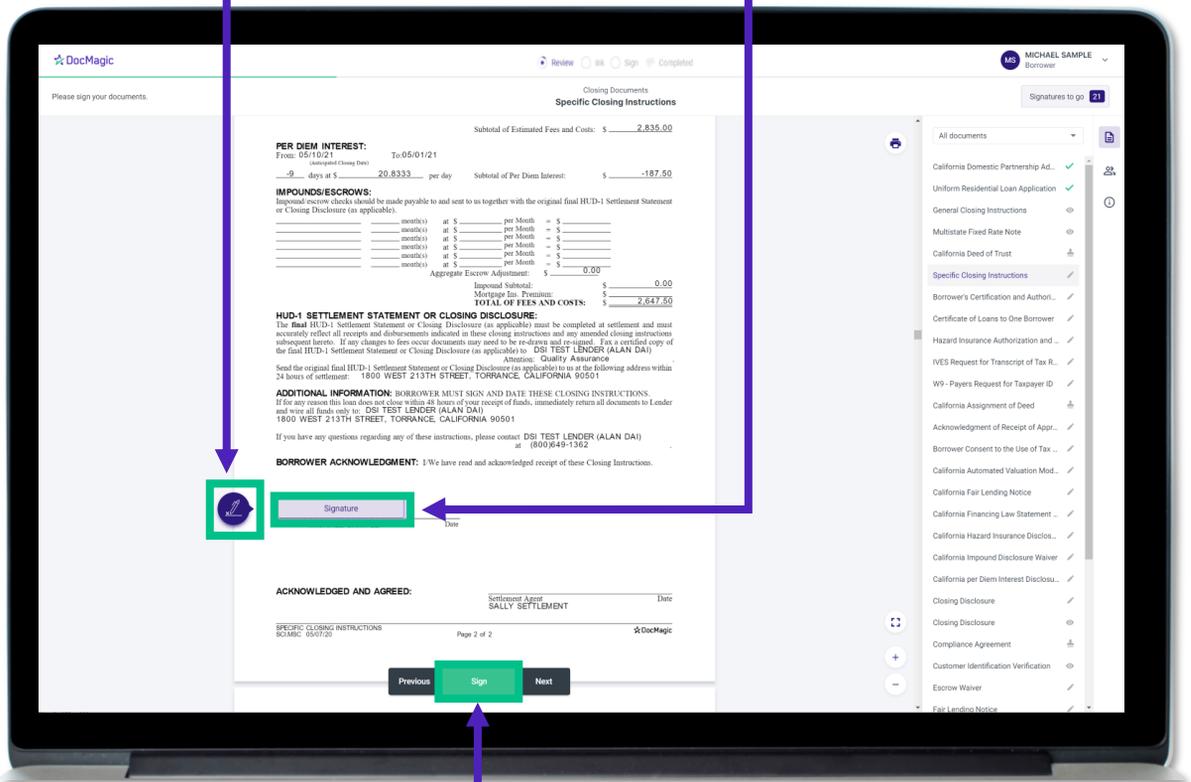


# Begin Click-Signing

You have three options for click-signing.

1. Clicking the pen icon.

2. Clicking on the signature box directly.

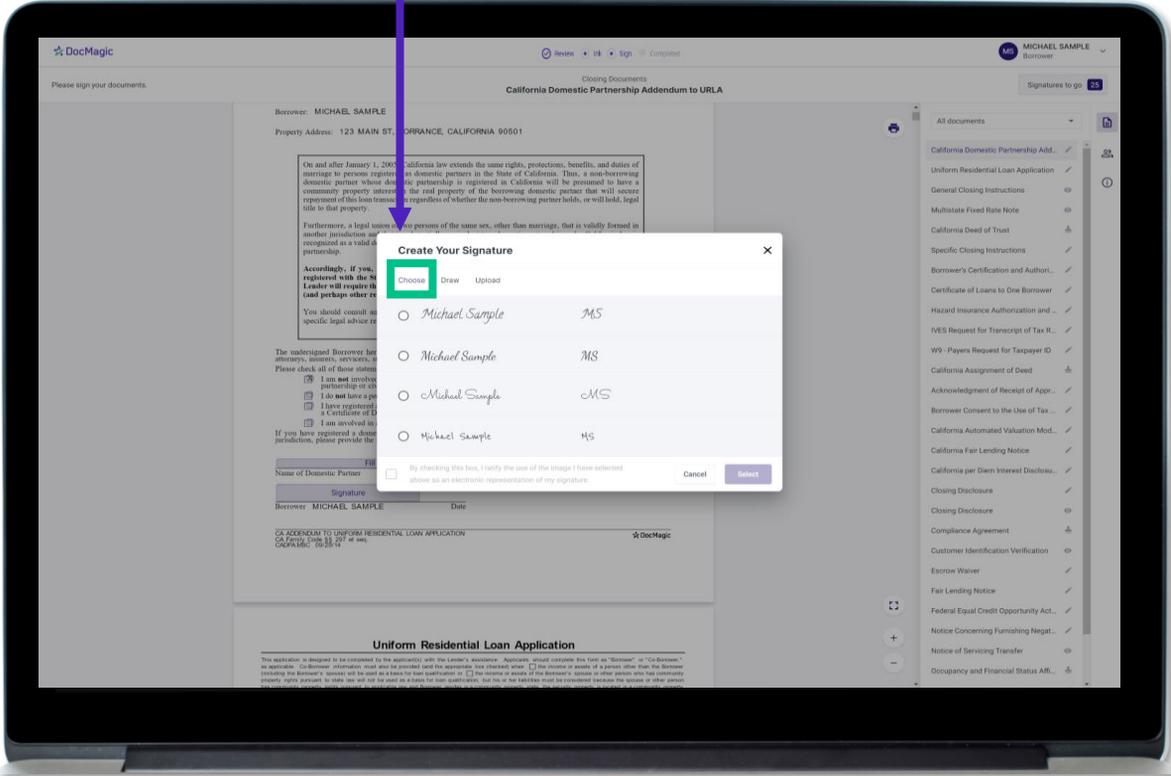


3. Clicking on the Green Sign box which will automatically advance to the next task each time.



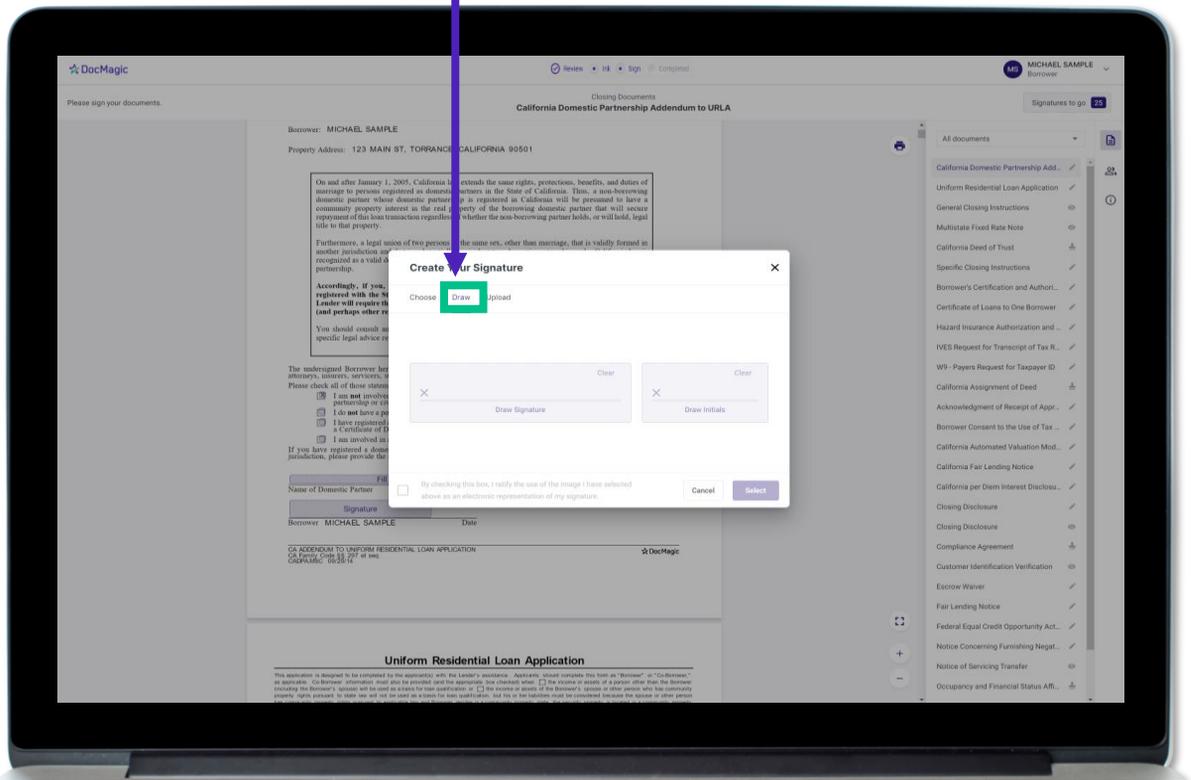
# Signature Options

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



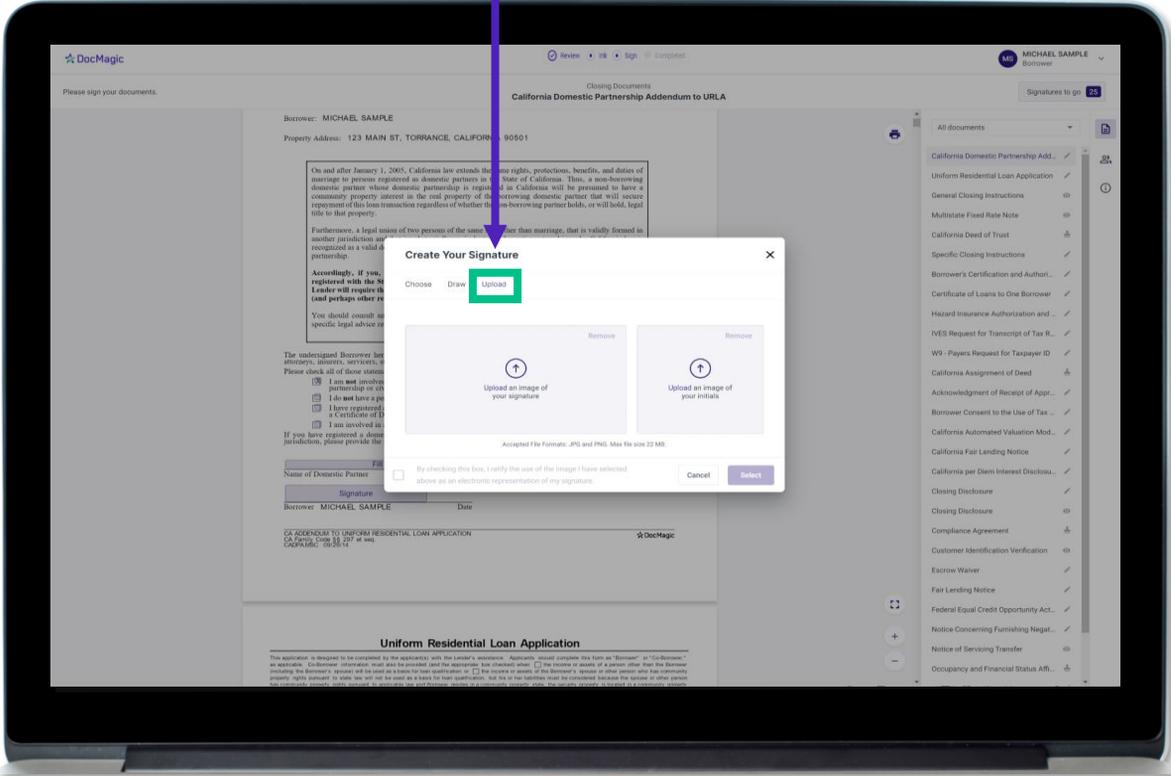
# Signature Options

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



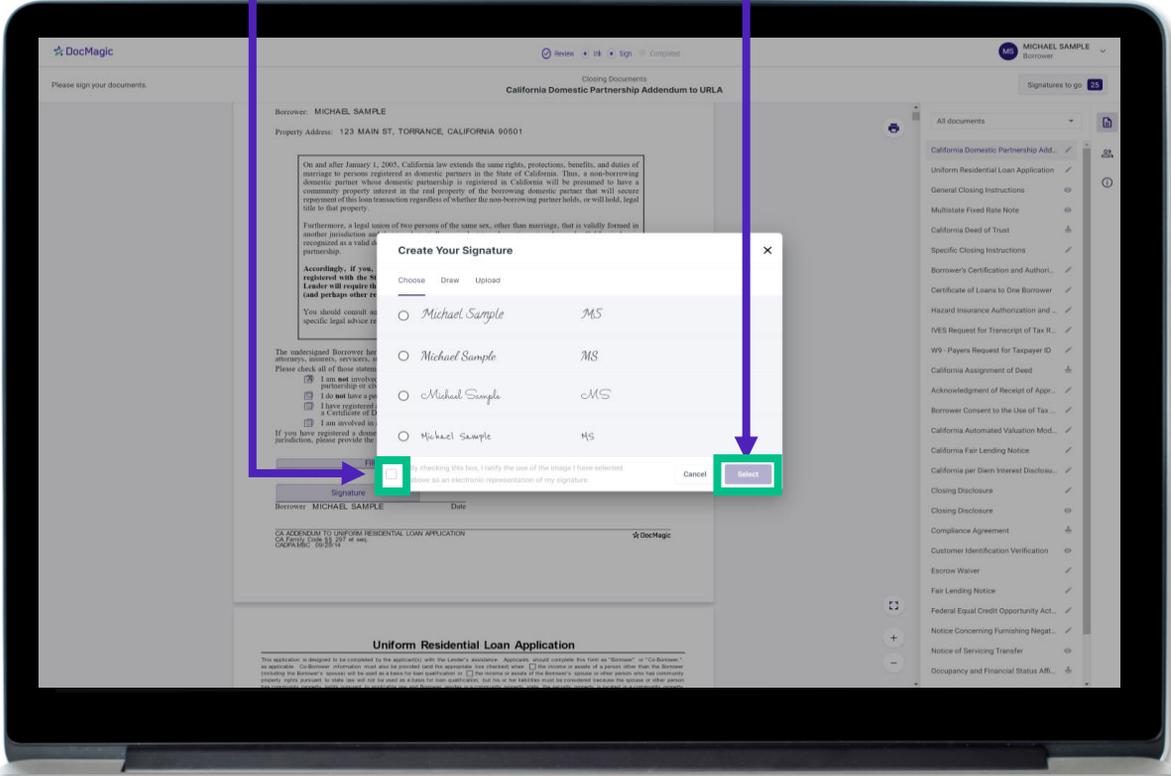
# Signature Options

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



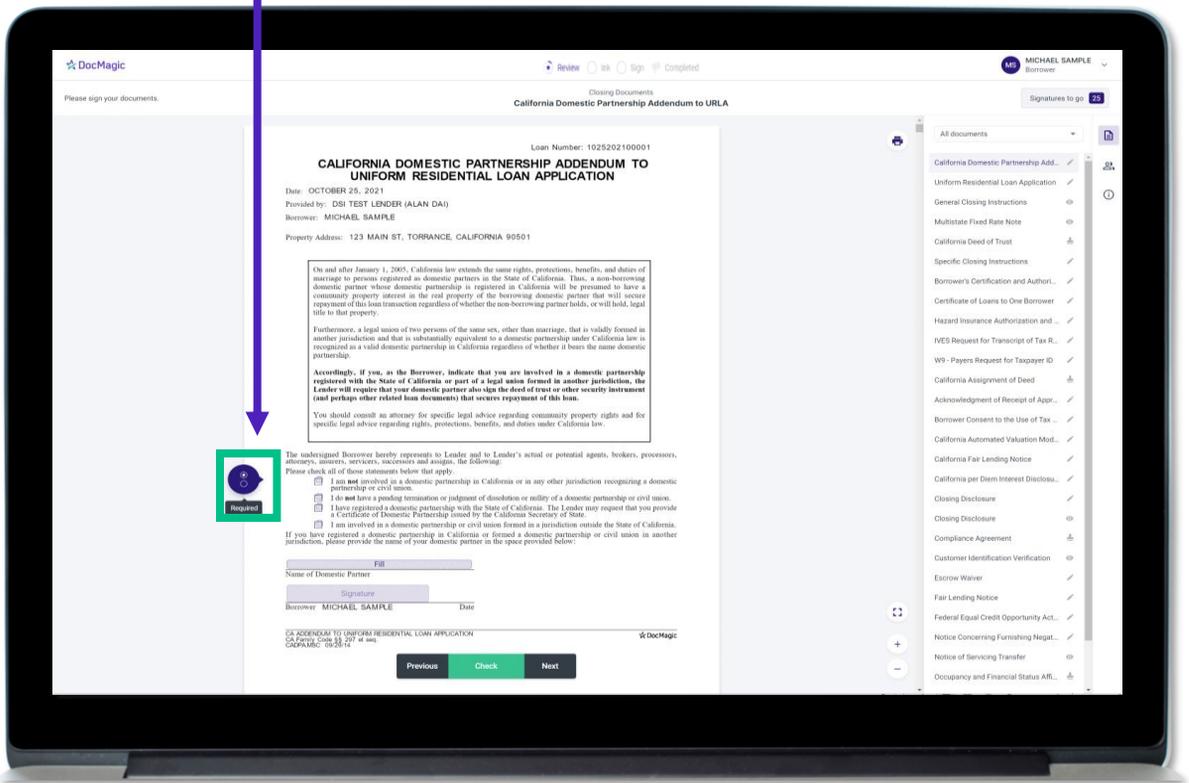
# Signature Options

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



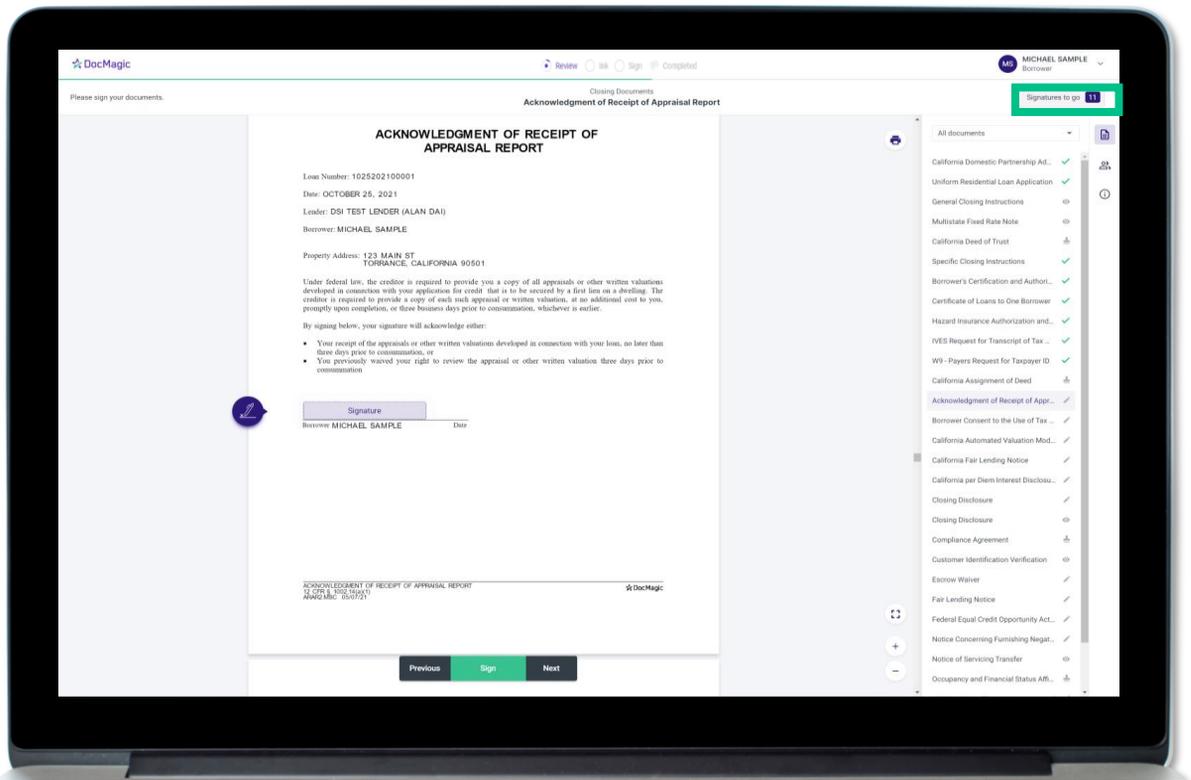
# Check Boxes Required

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



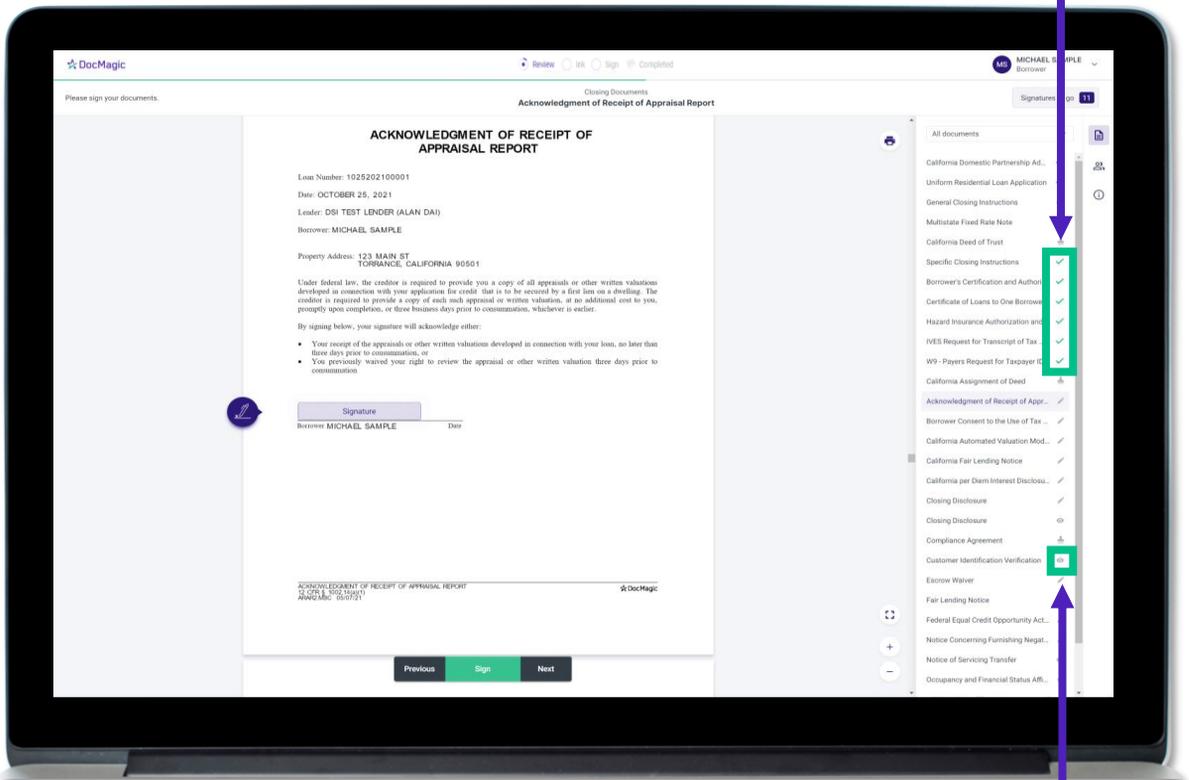
# Keeping Track of Your Progress

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.

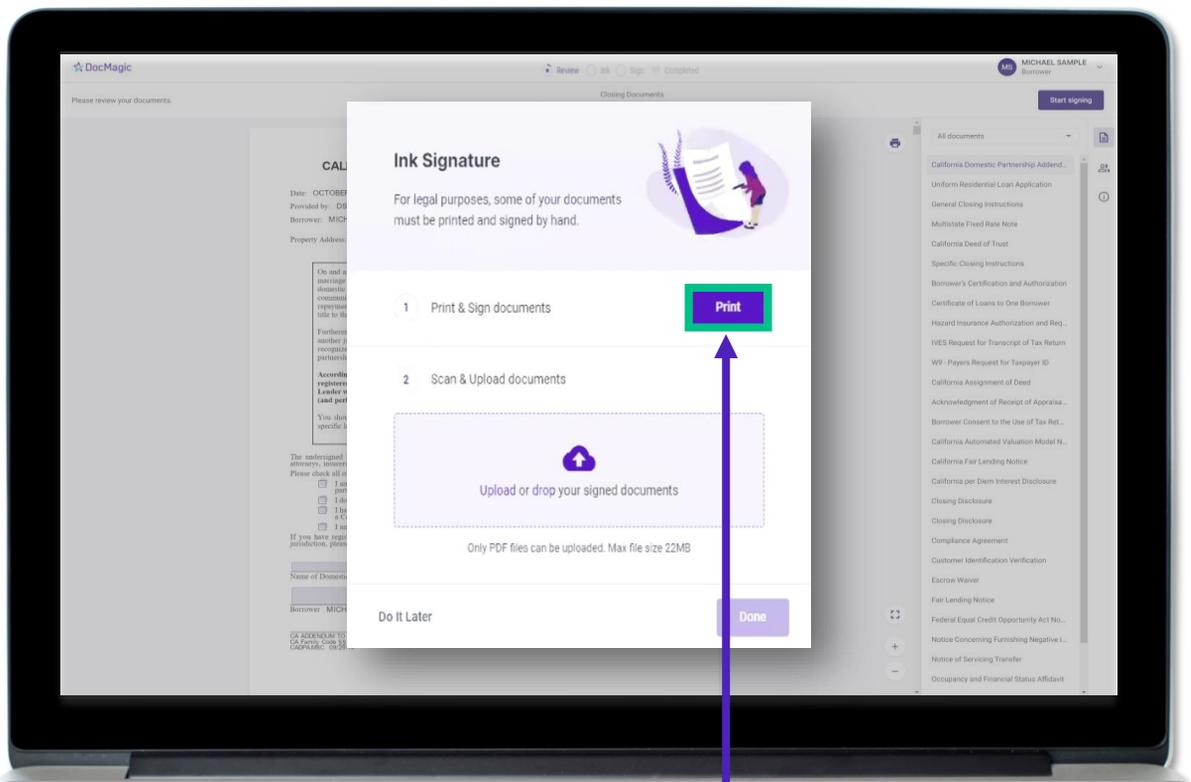


The eyeball icon indicates this is a document that does not require a signature.



# 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.

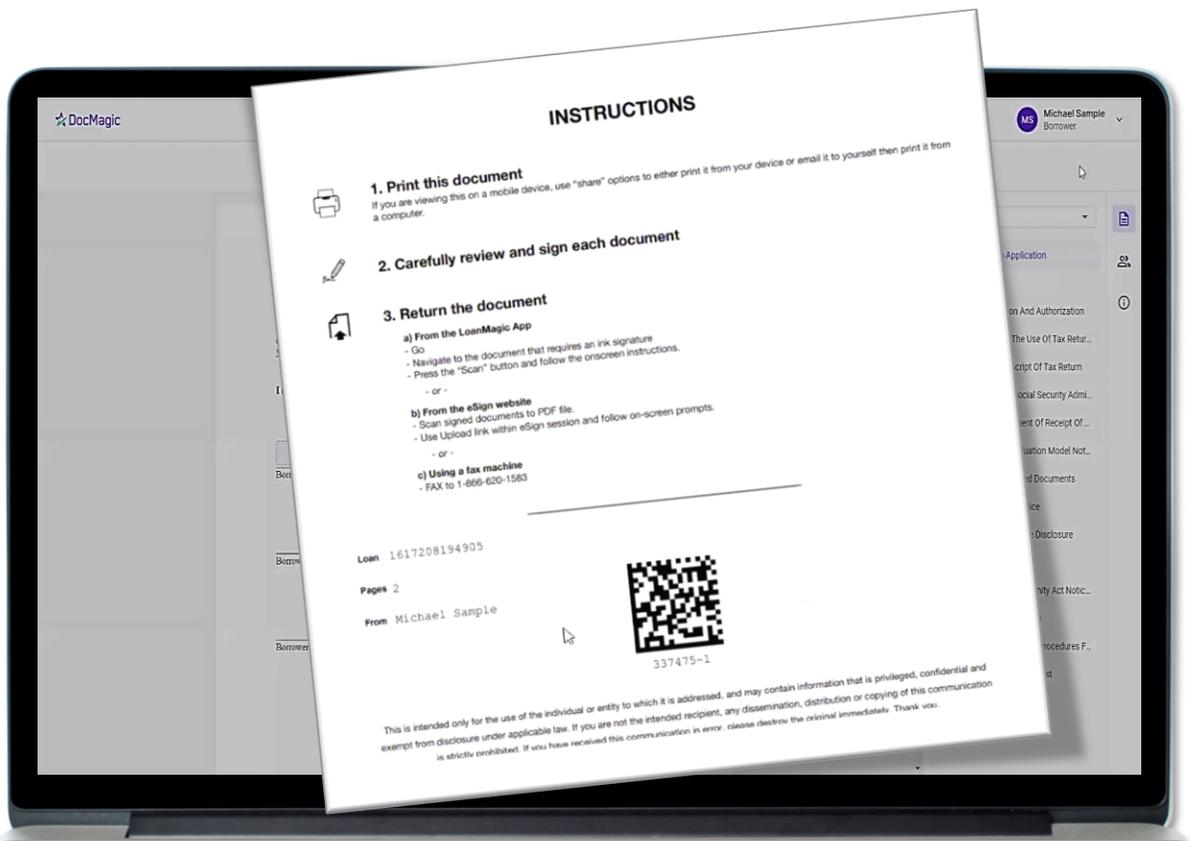


Click "Print" to start the ink-signing process.



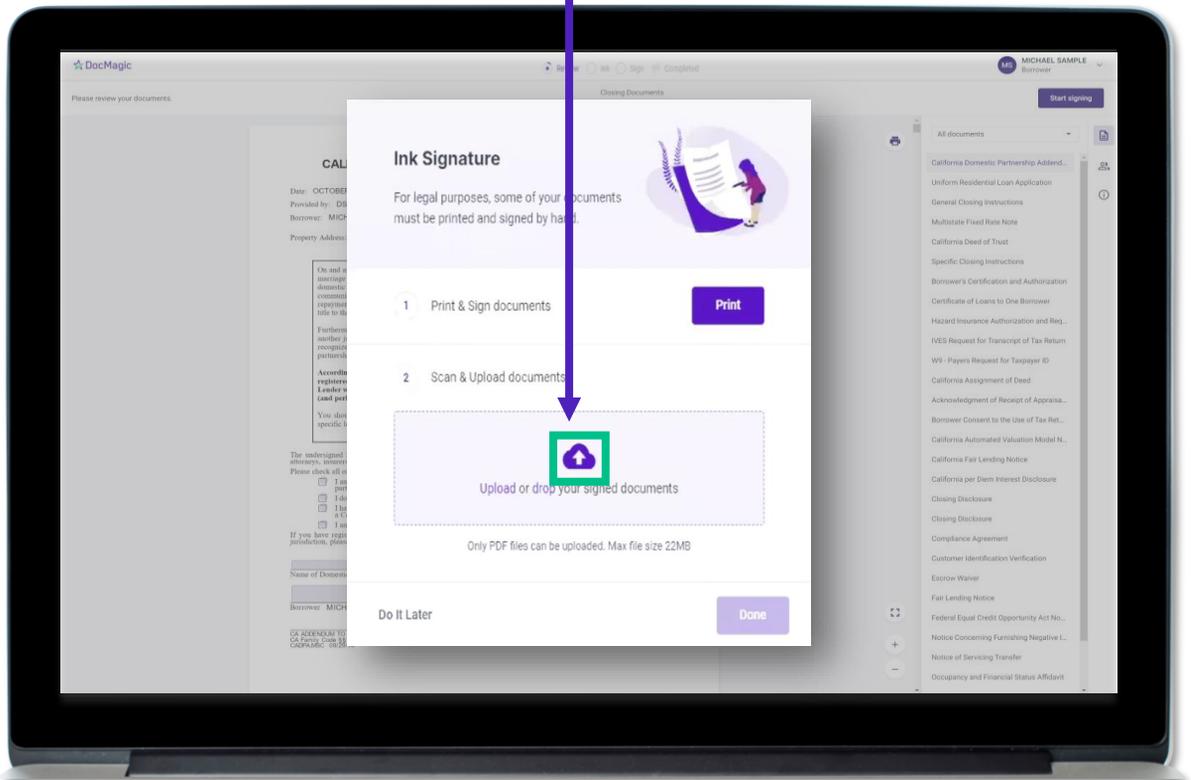
# Ink Signing: Download and Print

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 document titled 'Ink Signature' is visible, with text stating 'For legal purposes, some of your documents must be printed and signed by hand.' A QR code is located at the bottom of the document, with a blue arrow pointing to it from the text box above. The QR code is labeled 'DocuSign'. The document also 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 on-screen instructions.
    - or -
  - b) From the eSign website**
    - Scan signed documents to PDF file.
    - Use Shared link within eSign session and follow on-screen prompts.
    - or -
  - c) Using a fax machine**
    - FAX to 1-888-800-1583

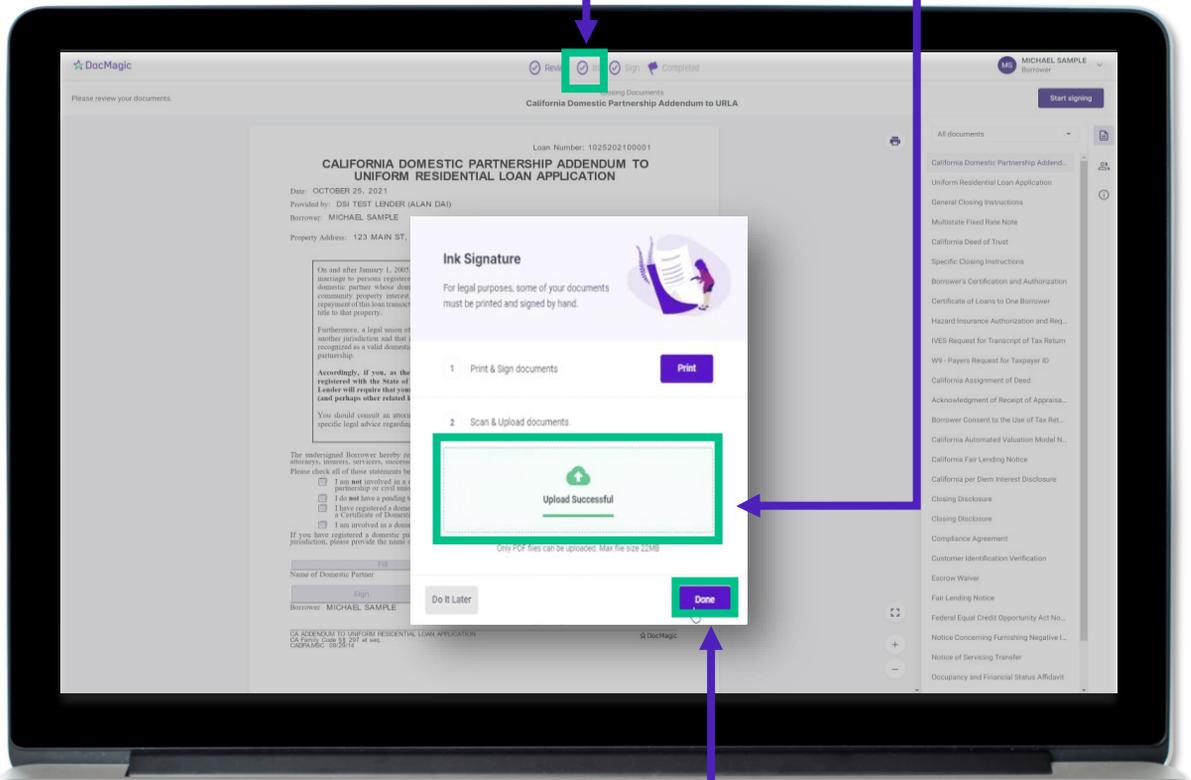
Loan: 777435612  
Pages: 25  
From: STEVE SAMPLE



# Ink Signing: Verification

Once uploaded, the Ink circle is checked.

You will also see "Upload Successful".



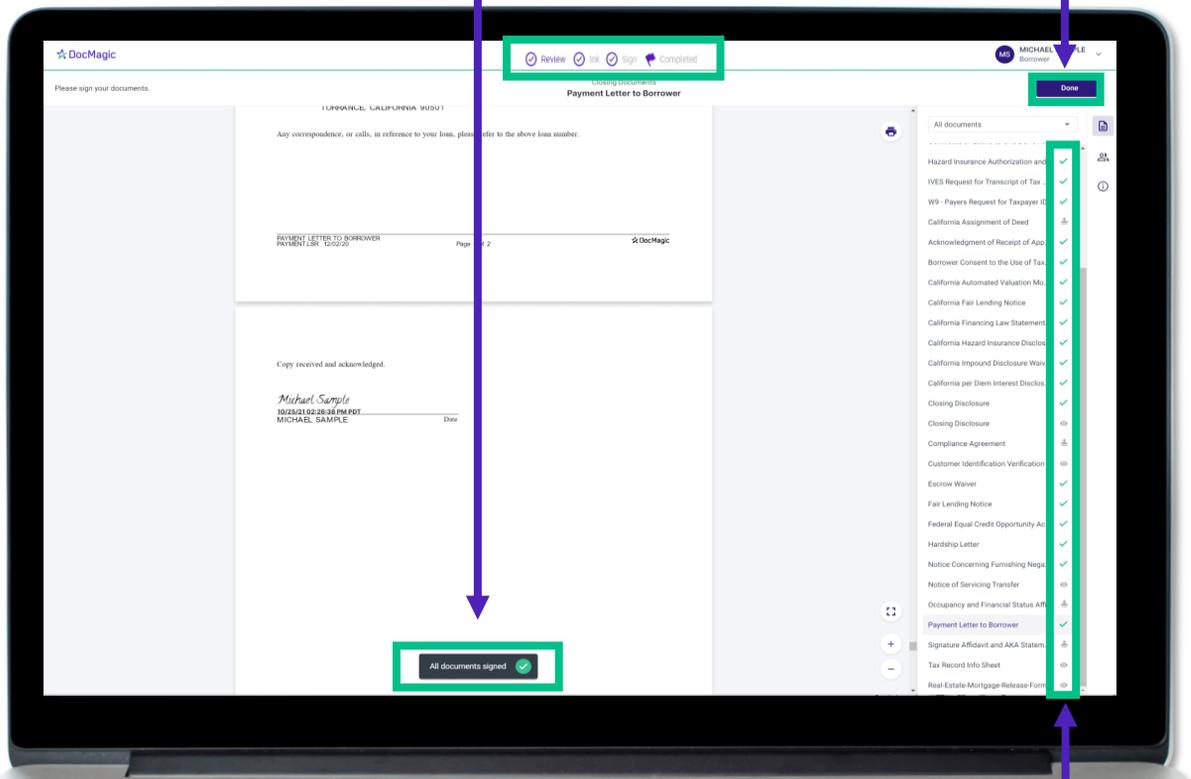
Click "Done" to complete the ink signing process, return to the stack, and click-sign the remaining documents.



# When Complete

These icons will indicate when all signatures are collected.

Click done to complete the process.

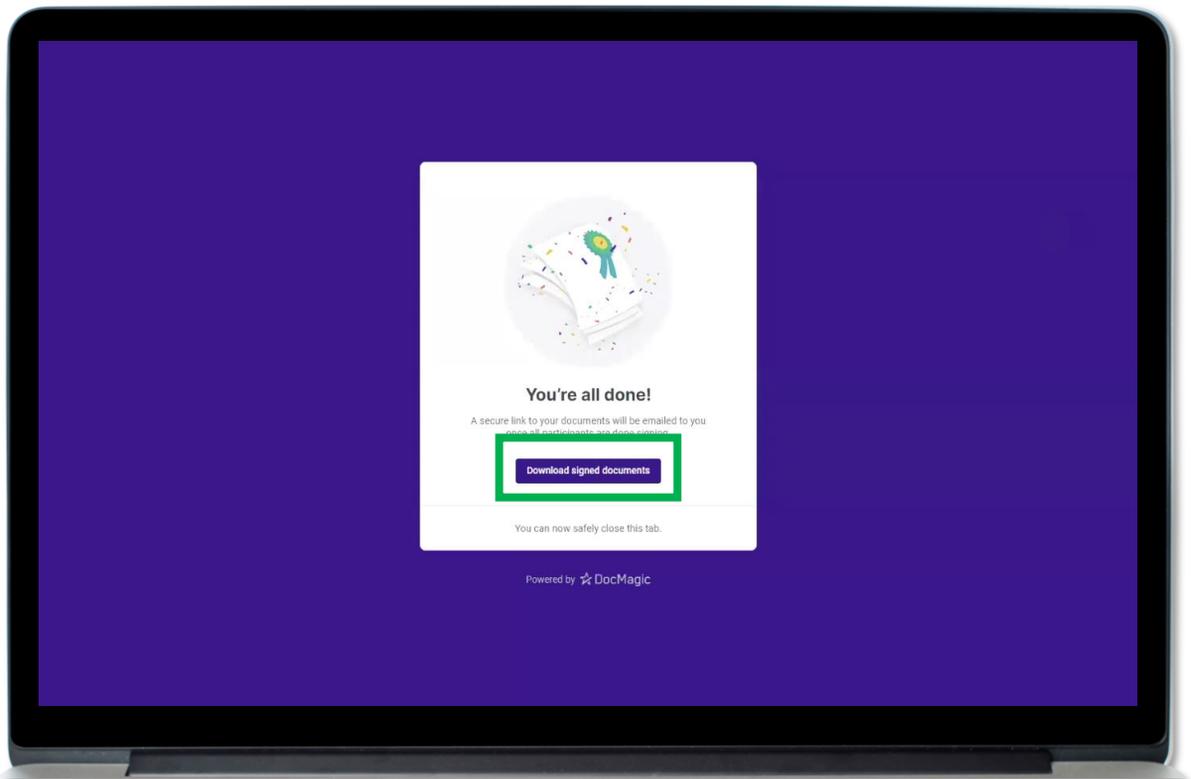


All applicable checkmarks will be green.



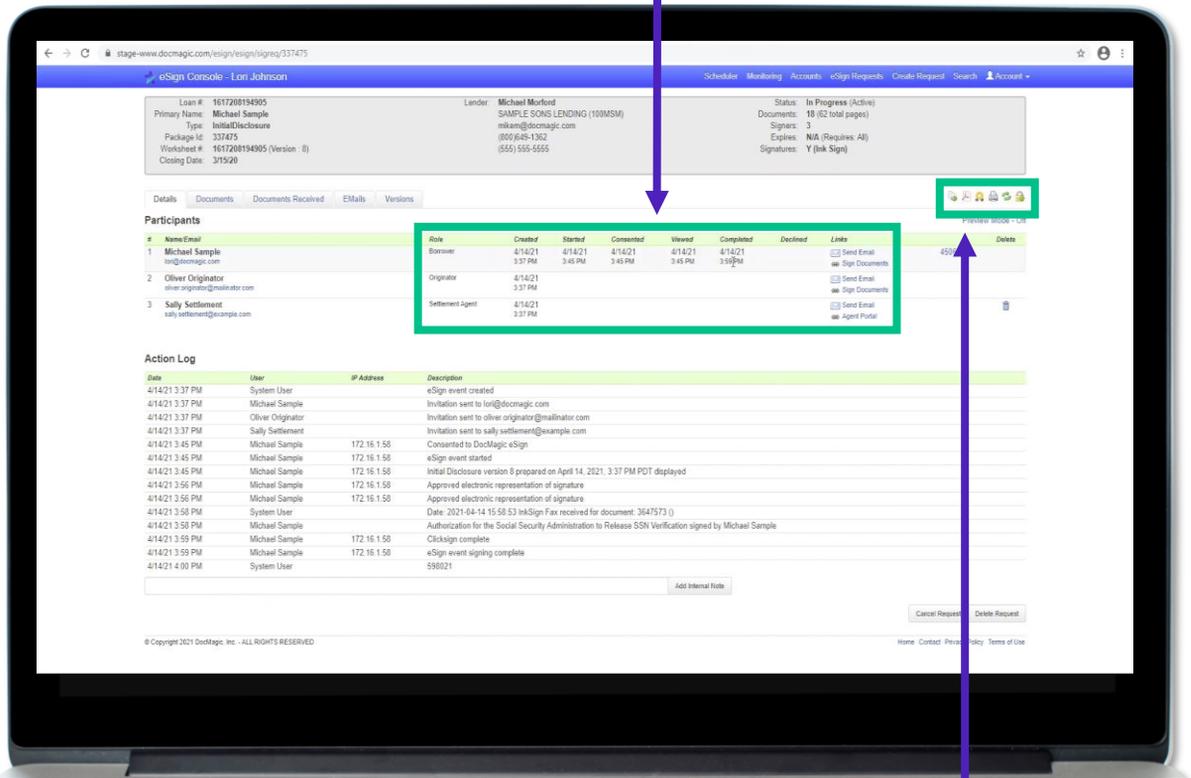
## When Complete

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.

**DocMagic**

## REMOTE ONLINE NOTARY (RON) REQUEST

Your notary services are being requested for a remote online closing  
⚠ Please respond within 2 hours\*

[Notary First Name],

We are requesting your services for the following remote online closing, on behalf of [lender]:

Closing Event Information	Property Information
Reference #: 019847-8594	County: Los Angeles
Date: June 25, 2020 at 11:30am PST	State: California
Participants: 4	
Notary Type: Total eClose Paperless	

**ACCEPT or DECLINE**

If you have any questions about this process, [click here](#) to view our training and support information.

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

**\*Please note:**  
If we do not receive a response within 2 hours, we may have to engage another service provider.

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1100 W. 213th St, Torrance, California 90501 | (800) 649-1362

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



# 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 interface. 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 are visible: a teal "ACCEPT" button and an orange "DECLINE" button. 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 displayed: "Thank You! Sally Settlement Settlement Closing Company sally.settlement223@mailinator.com". A blue arrow points from the text box above 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

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

**DocMagic**

## REMOTE ONLINE NOTARY (RON)

Congratulations!

DocMagic,

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 #: 777101120230001	Address: 935 WILLOW STREET
Date: October 12, 2023 at 12:00pm PDT	City: FRISCO
Participants: 1	State: GA
Notary Type: Remote Online	Zip Code: 75034

**Lender Information**

Company Name: DSI TEST LENDER (SALES)  
Contact: DSI TEST LENDER (SALES)

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 October 12, 2023.

If you have not conducted a Remote Online Notarization in the last 30 - 45 days, you have an opportunity to refresh your skills by re-taking our RON Certification course. Click [HERE](#) to access the course.

Take advantage of the **R.O.N. Guidebook!** Click [HERE](#) to download it.

**Thank You!**  
Byron Oden  
BYRON'S SETTLEMENT CLOSING COMPANY  
[struitt@docmagic.com](mailto:struitt@docmagic.com)



# 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: 00 HOURS: 00 MINUTES: 00 SECONDS: 00  
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 strullt@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 strullt@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	✓	

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...  
Phone: (555) 555-5555

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: sally@docmagic...  
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 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

**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	✓	

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 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

**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

DELL



# The eClose Console

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

The screenshot displays the DocMagic eClose Console (Notary) interface. At the top, there's a navigation bar with the DocMagic logo and 'eClose Console (Notary)'. Below this, 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: strull@docmagic.c..., Phone: (987) 555-4321). To the right is a 'COUNTDOWN TO CLOSING' widget showing a timer for days, hours, minutes, and seconds, with a date of 09/18, 2023 (Wed) and time of 12:00am PDT. Below these 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	eSign
1	John Smith strull@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"/> <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 strull@docmagic.com	Settlement Agent					● Ready to Sign	<input type="button" value="Open Signing Room"/>

Below the signers table is the 'Documents (6)' section, which includes a table with columns for '#', 'eSign Enabled', 'Page(s)', 'Signer(s)', 'Completed', and 'Delete'. The documents listed are:

#	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: strullt@docmagic.c...  
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 strullt@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@mailnat...	Originator					● Ready to Sign	<input type="button" value="Open Signing Room"/>
3	Sally Settlement strullt@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 (DATE, HOURS, MINUTES, SECONDS). A 'Start eClosing' button is visible.

The 'Signers (3)' table lists the following participants:

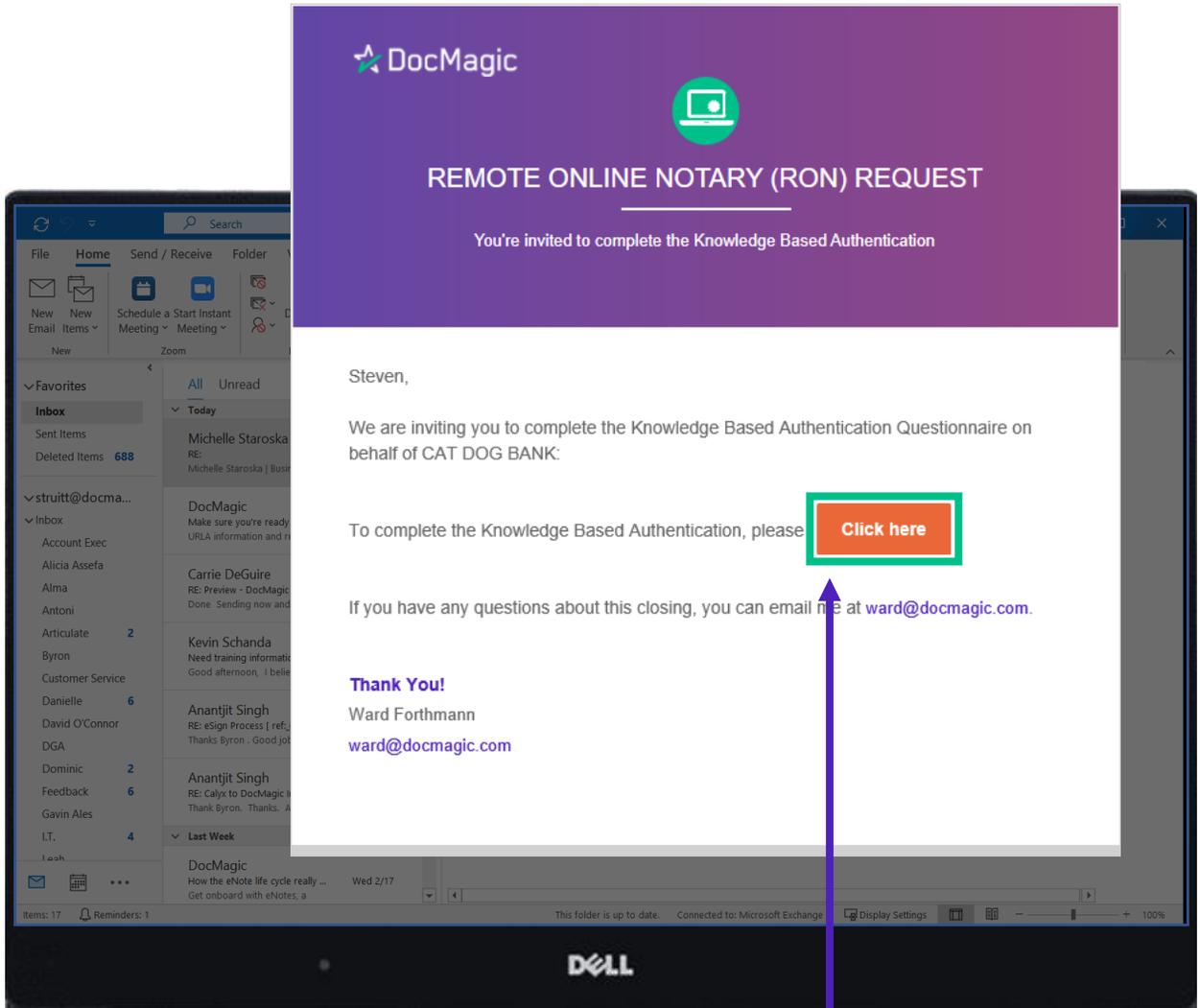
#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	John Smith strull@docmagic.com	Borrower	Doc Magic ron-lesl@docmagic.com	DocMagic RON 11/9/2021 - 12:00am	✉ ○	👤 ○	● Not Started	Open Signing Room
2	Oliver Originator oliver.originator@mailinat...	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 overlaid on the interface. It contains the following elements:

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



# KBA Invitation Email

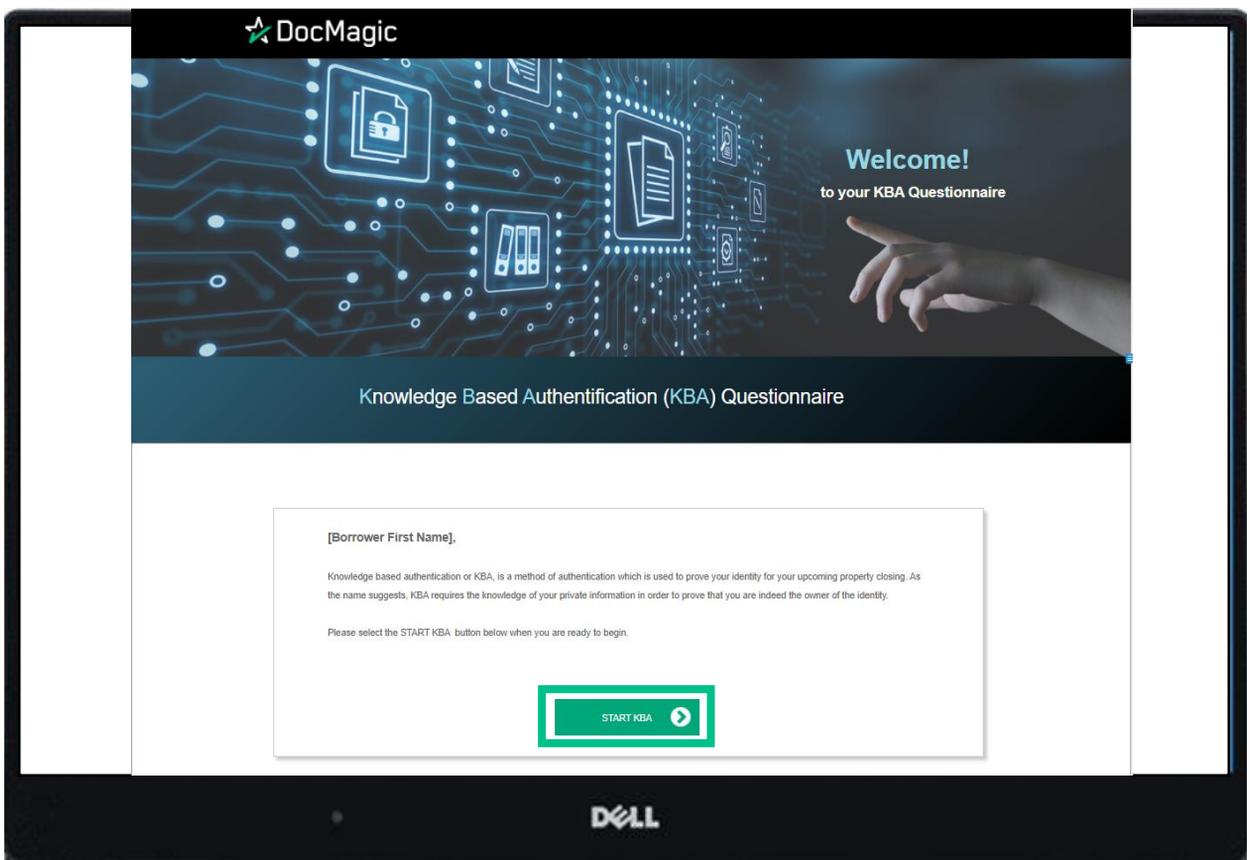


The Participant will receive this invitation email to complete the KBA process.



# 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.

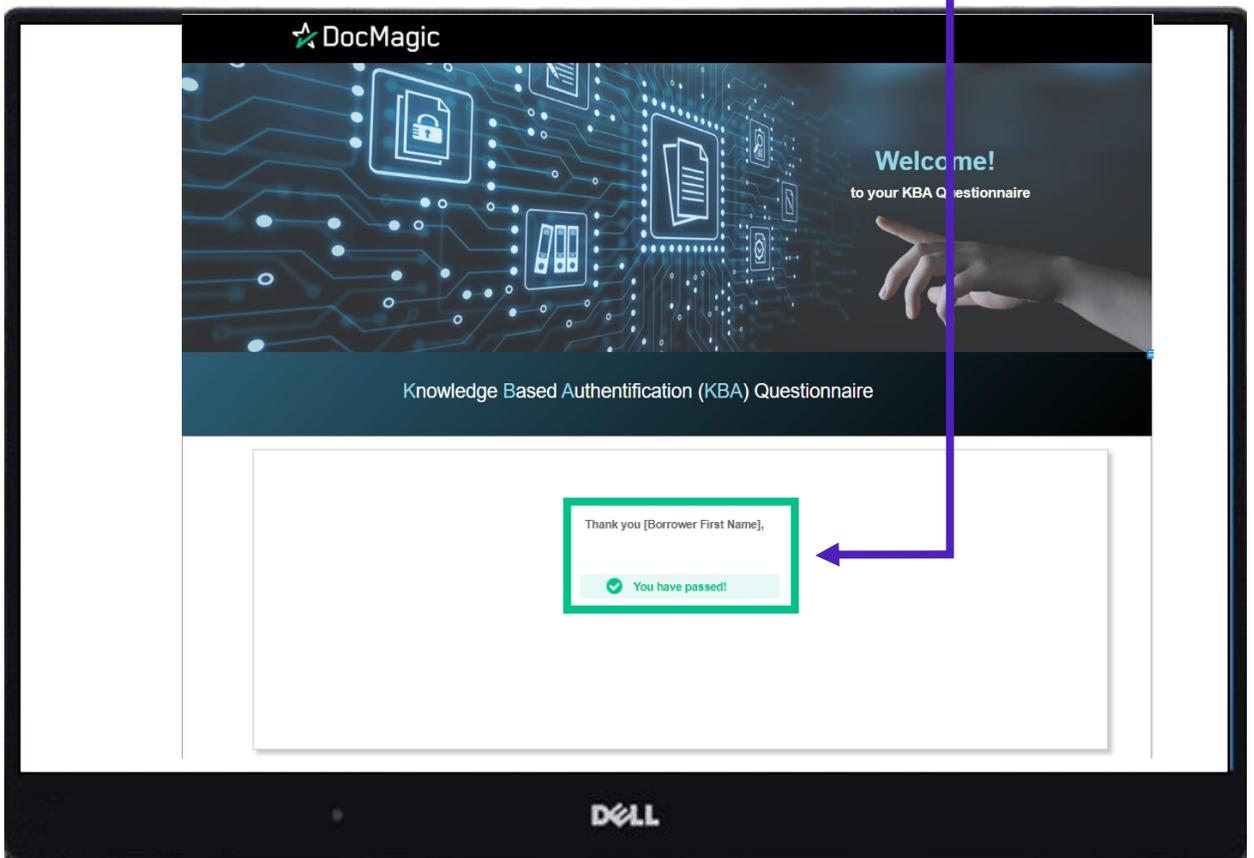


The Participant will then complete the questions and hit Submit to register their answers.



# 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 these are sections for 'LOAN', 'LENDER', and 'SETTLEMENT AGENT'. A 'COUNTDOWN TO CLOSING' widget shows the time remaining. 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. A blue arrow points to the 'ID Verify' button for the first signer, John Smith. Below the signers is a 'Documents (6)' section with a table listing documents and their completion status.

#	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@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"/>

#	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"/>	

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. The dialog box contains a 'Text Identity Verification' section with a 'Mobile Phone #' field (highlighted with a red box). Below this is a text area for 'Enter additional comments to be sent with the Identity Verification'. At the bottom of the dialog box, there is an 'Identity Verification Link' section and a 'Copy Link' button. The 'Text Identity Verification' button at the bottom right of the dialog box is also highlighted with a red box. Red arrows point from the text above to the 'Mobile Phone #' field and the 'Text Identity Verification' button.

#	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: struitt@docmagic.c..., Phone: (987) 555-4321). To the right of these cards is a "COUNTDOWN TO CLOSING" widget showing a timer for Days, Hours, Minutes, and Seconds, with the date "Apr 19, 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 struitt@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 struitt@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		

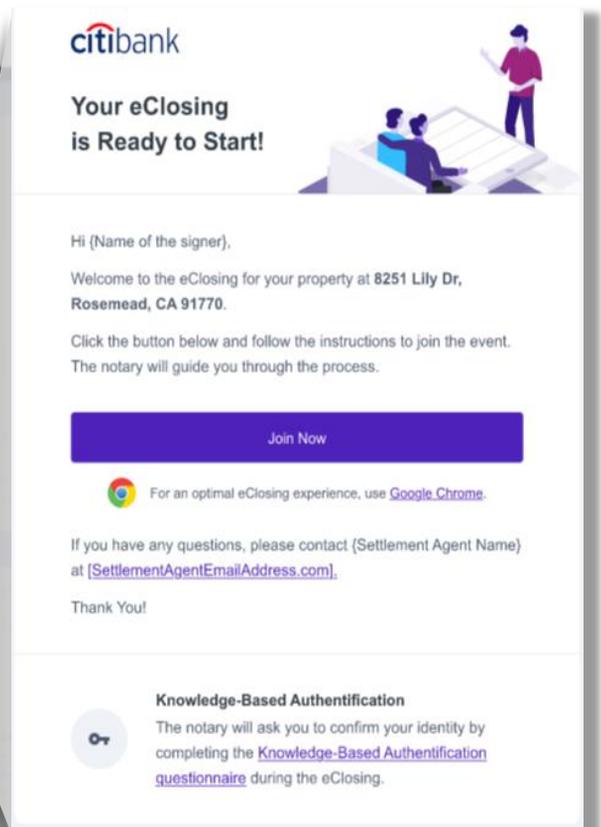
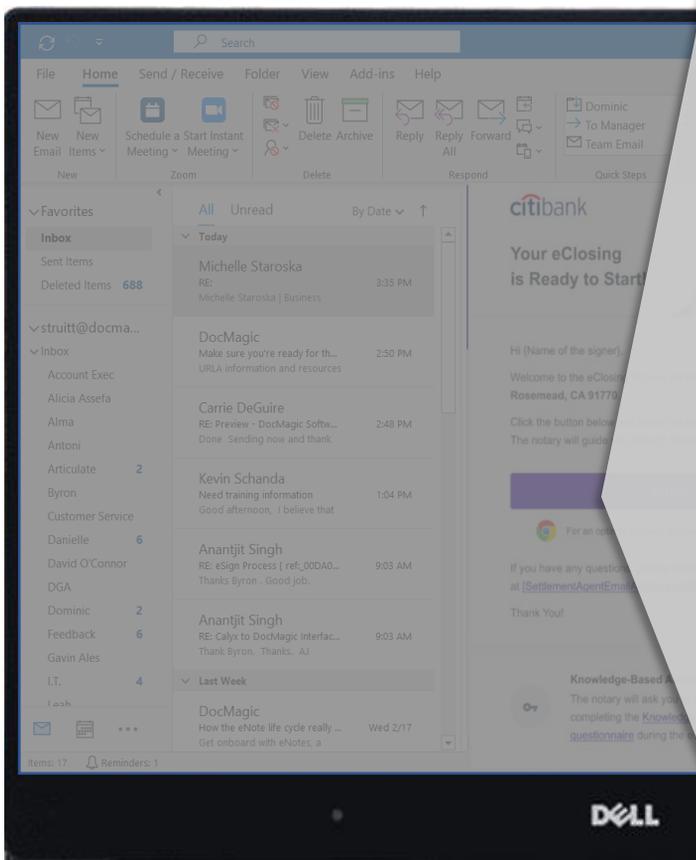
include link for knowledge-based authentication (KBA)

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



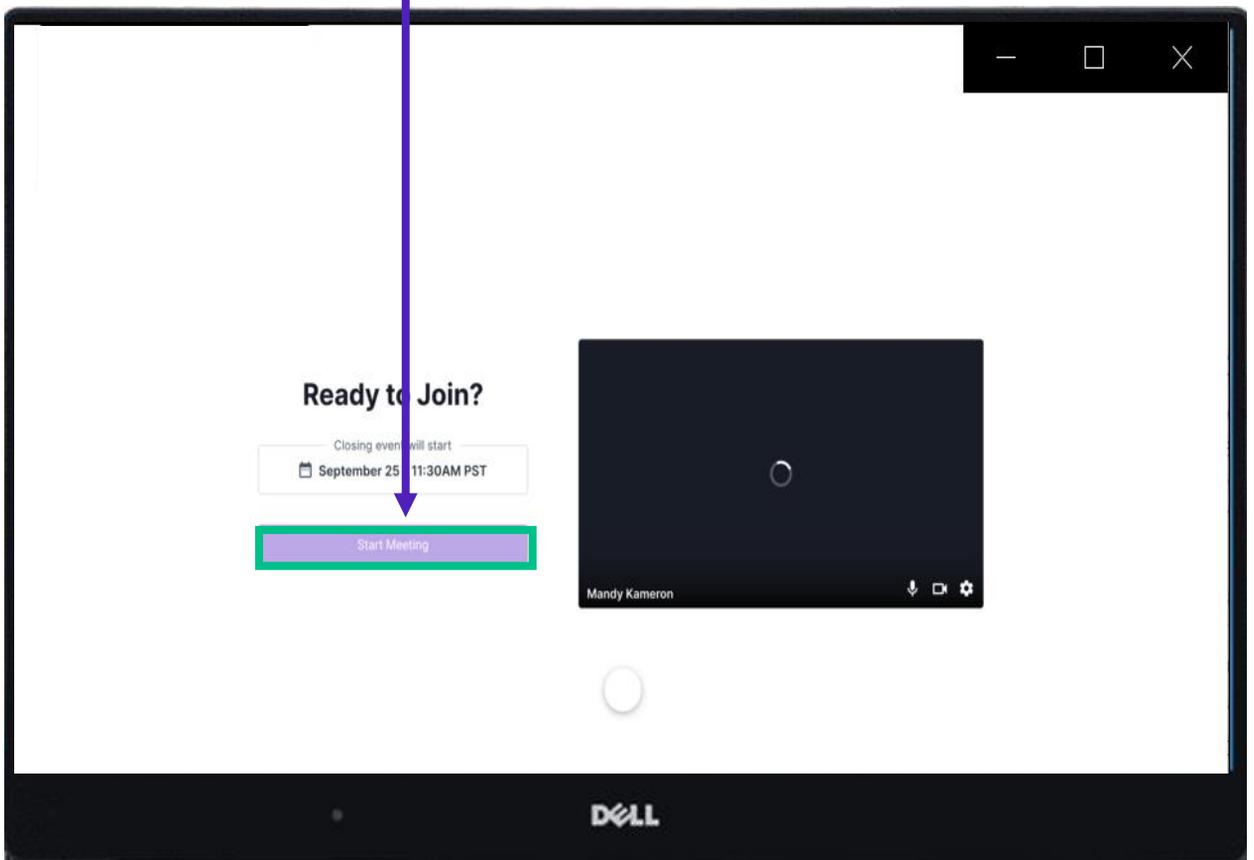
# Invitation Email

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



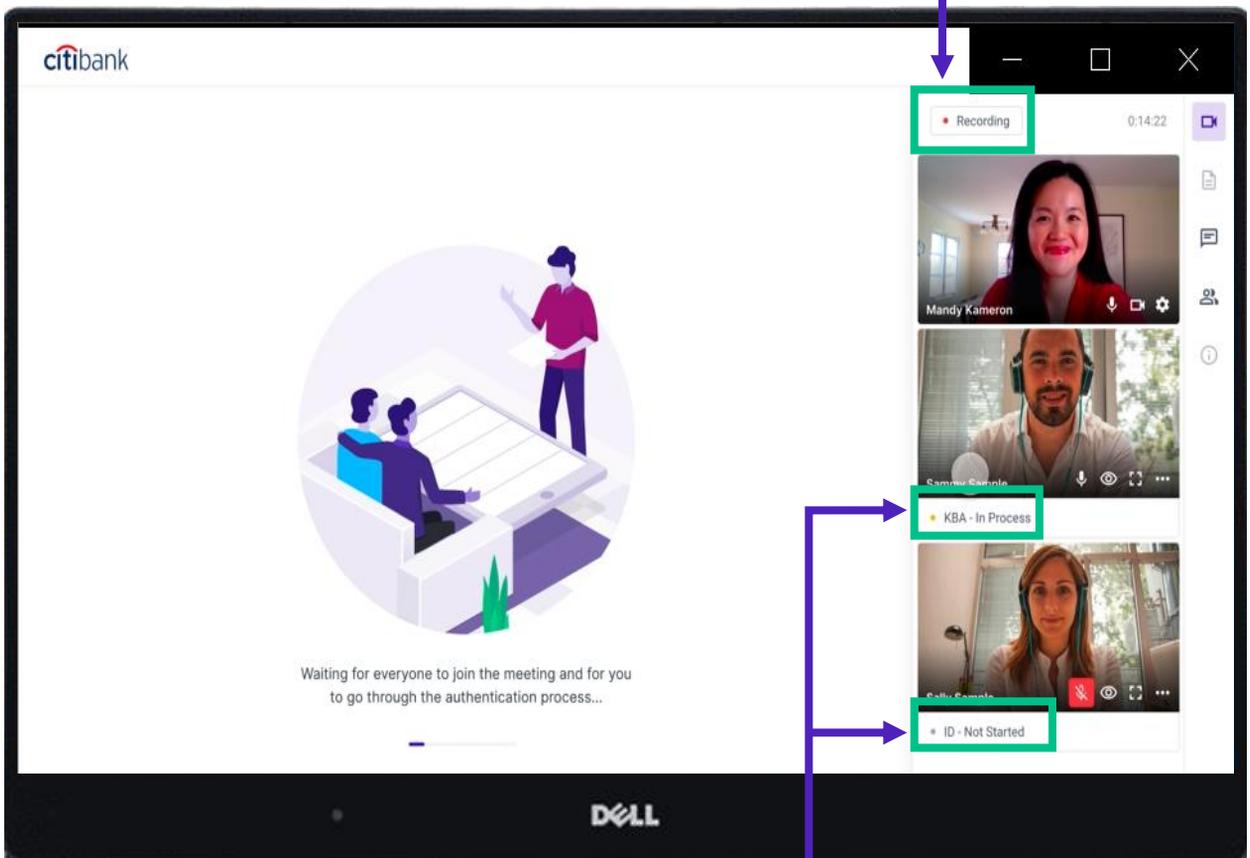
# Join Participants

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.

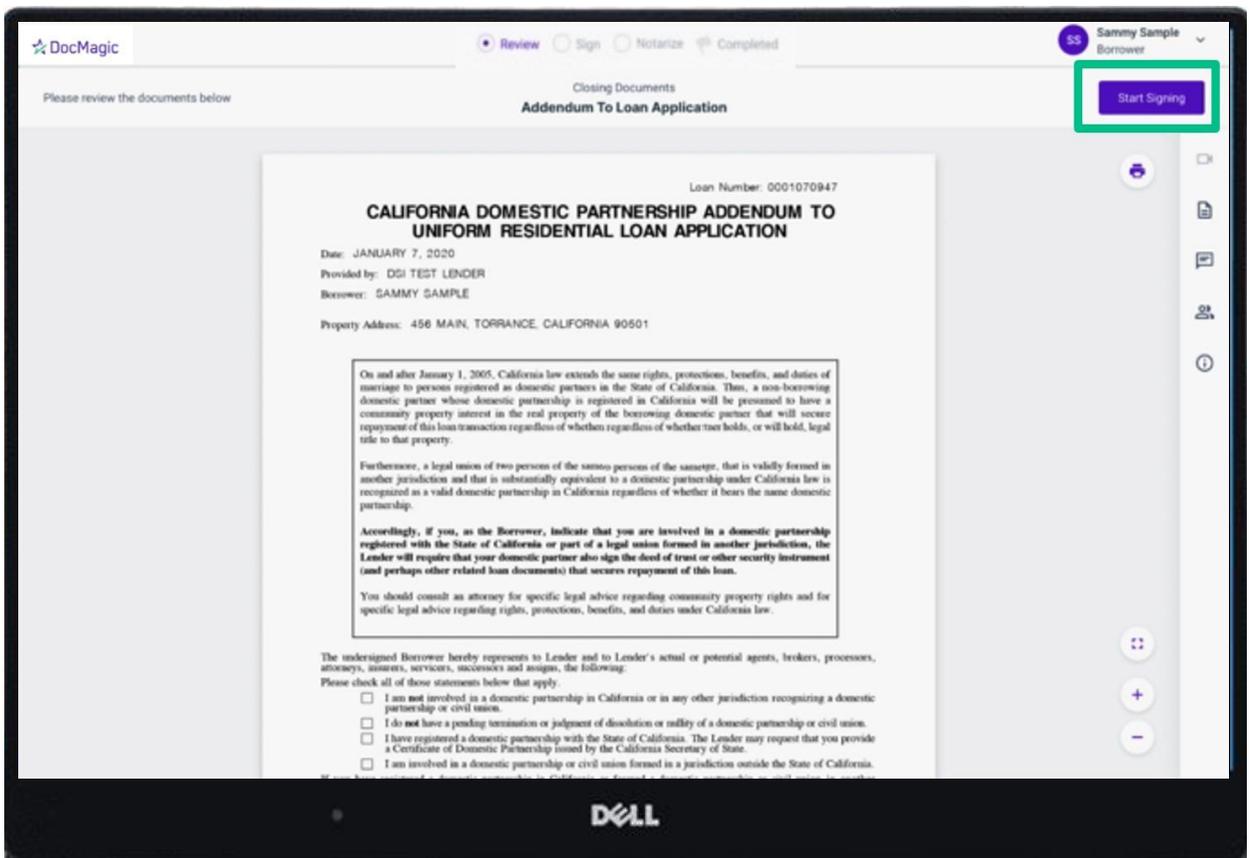
The screenshot displays a Citibank video meeting interface. On the left, a circular illustration shows a person standing and presenting to two seated individuals. Below the illustration, the text reads: "Waiting for everyone to join the meeting and for you to go through the authentication process...". On the right, a video call window shows three participants: Mandy Kameron, Sammy Sample, and Sally Sample. Below each video feed, a status bar indicates "Ready to Sign" and a "Start" button. A purple line with arrows points from the text box above 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 interface for reviewing a document titled "CALIFORNIA DOMESTIC PARTNERSHIP ADDENDUM TO UNIFORM RESIDENTIAL LOAN APPLICATION". The document includes the following text:

Loan Number: 0001070947

Date: JANUARY 7, 2020

Provided by: DSI TEST LENDER

Borrower: SAMMY SAMPLE

Property Address: 456 MAIN, TORRANCE, CALIFORNIA 90501

On and after January 1, 2005, California law extends the same rights, protections, benefits, and duties of marriage to persons registered as domestic partners in the State of California. Thus, a non-borrowing domestic partner whose domestic partnership is registered in California will be presumed to have a community property interest in the real property of the borrowing domestic partner that will secure repayment of this loan transaction regardless of whether it is registered in California.

Furthermore, a legal union of two persons of the same sex persons of the same that is validly formed in another jurisdiction and that is substantially equivalent to a domestic partnership under California law is recognized as a valid domestic partnership in California regardless of whether it bears the same domestic partnership.

Accordingly, if you, as the Borrower, indicate that you are involved in a domestic partnership registered with the State of California or part of a legal union formed in another jurisdiction, the Lender will require that your domestic partner also sign the deed of trust or other security instrument (and perhaps other related loan documents) that secures repayment of this loan.

You should consult an attorney for specific legal advice regarding community property rights and for specific legal advice regarding rights, protections, benefits, and duties under California law.

The undersigned Borrower hereby represents to Lender and to Lender's actual or potential agents, brokers, processors, attorneys, insurers, servicers, successors and assigns, the following:

Please check all of these statements below that apply:

- I am not involved in a domestic partnership in California or in any other jurisdiction recognizing a domestic partnership or civil union.
- I do not have a pending transaction or judgment of dissolution or nullity of a domestic partnership or civil union.
- I have registered a domestic partnership with the State of California. The Lender may request that you provide a Certificate of Domestic Partnership issued by the California Secretary of State.
- I am involved in a domestic partnership or civil union formed in a jurisdiction outside the State of California.

The video conference interface on the right shows three participants: Mandy Kameron, Sammy Sample, and Gally Sample. All participants are in a "Ready to Sign" state. A "Recording" indicator is visible at the top of the video window.

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. 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. The document being signed is 'Borrower Consent To The Use Of Tax Return Information'. The form 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.

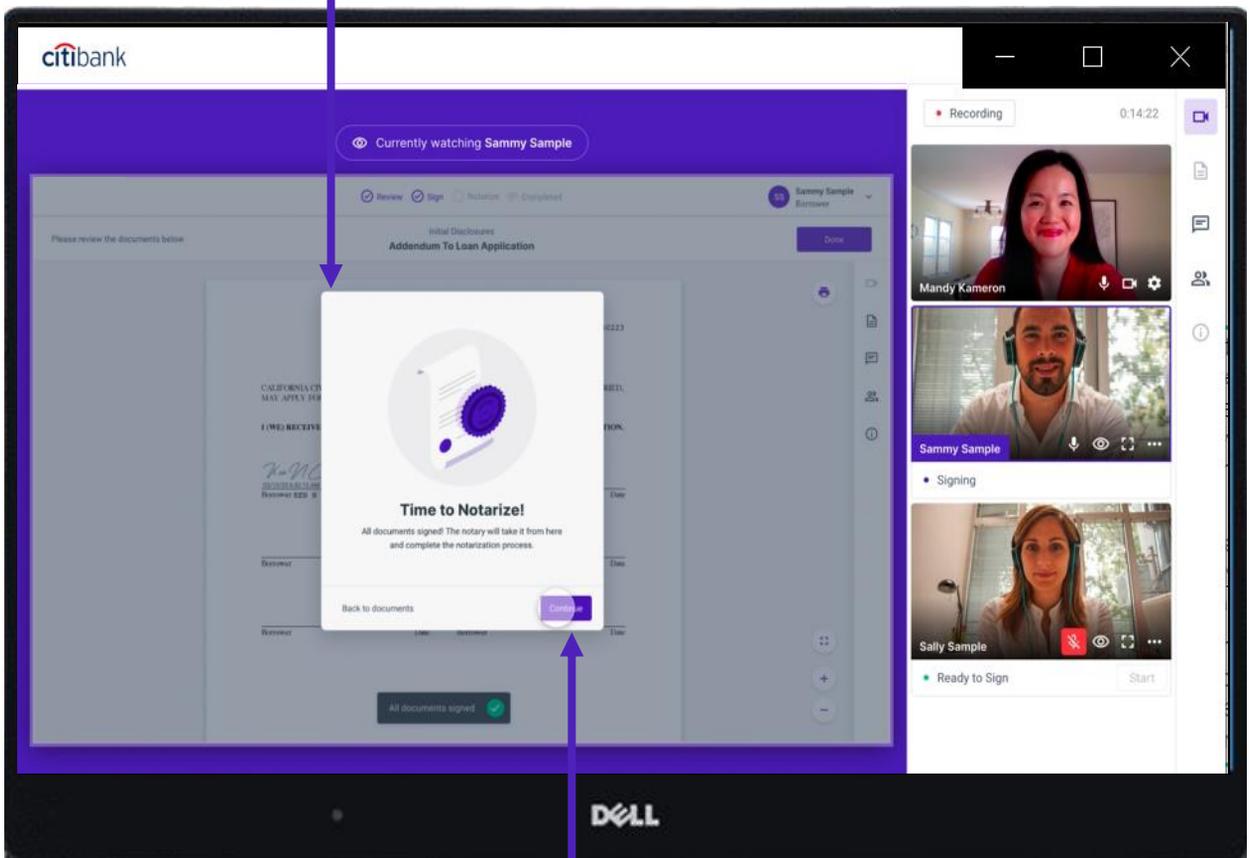
At the bottom of the form, there is a signature line for 'JOHN SMITH' with a 'Sign' button. Below this are 'Previous', 'Sign', and 'Next' navigation buttons. On the right side, a list of documents to be signed is shown, with 'Borrower Consent To The Use Of Tax Return Information' currently selected. A 'Signatures to Go' indicator shows 31 remaining documents.

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.

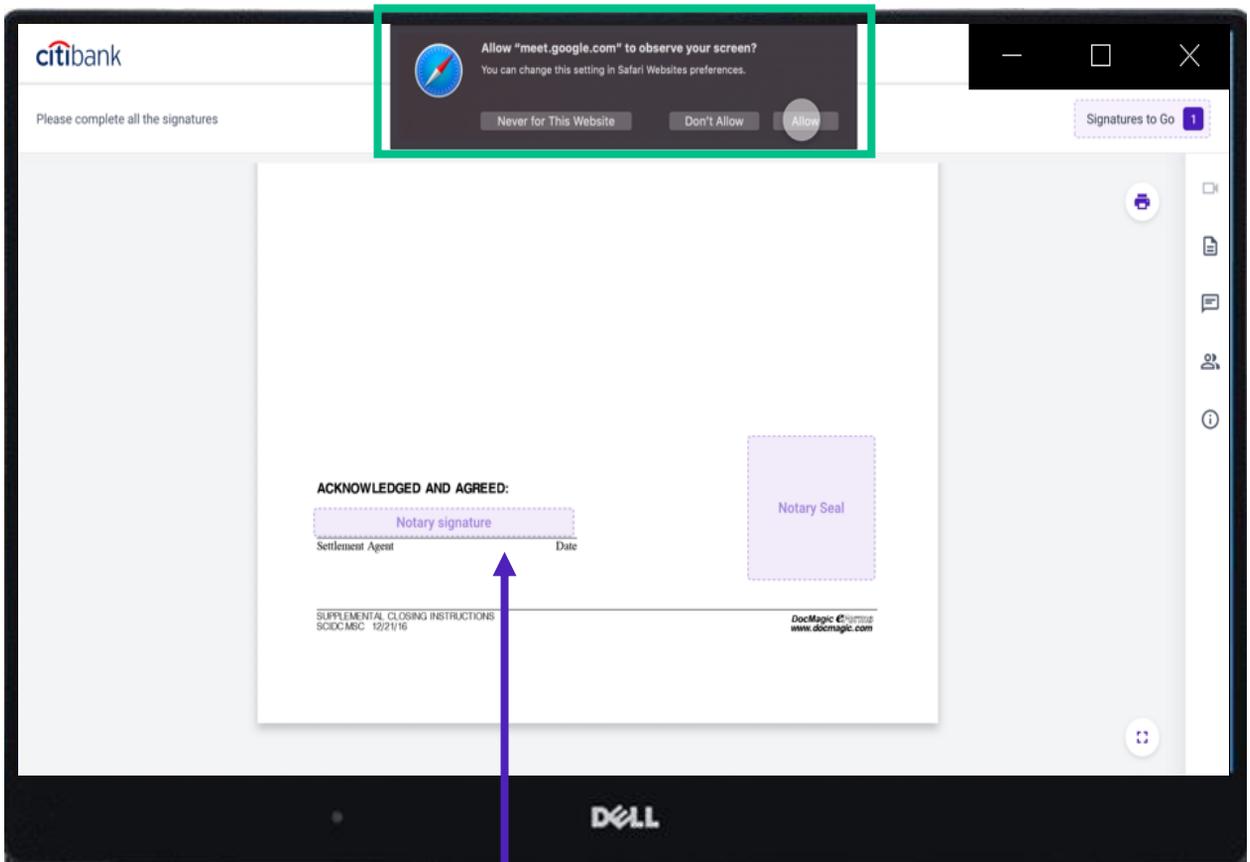


The Notary will click their way through the notarization process until all required documents have been successfully notarized.



# Add Your Signature, Seal, and more

The Notary must always allow their screen to be observable.

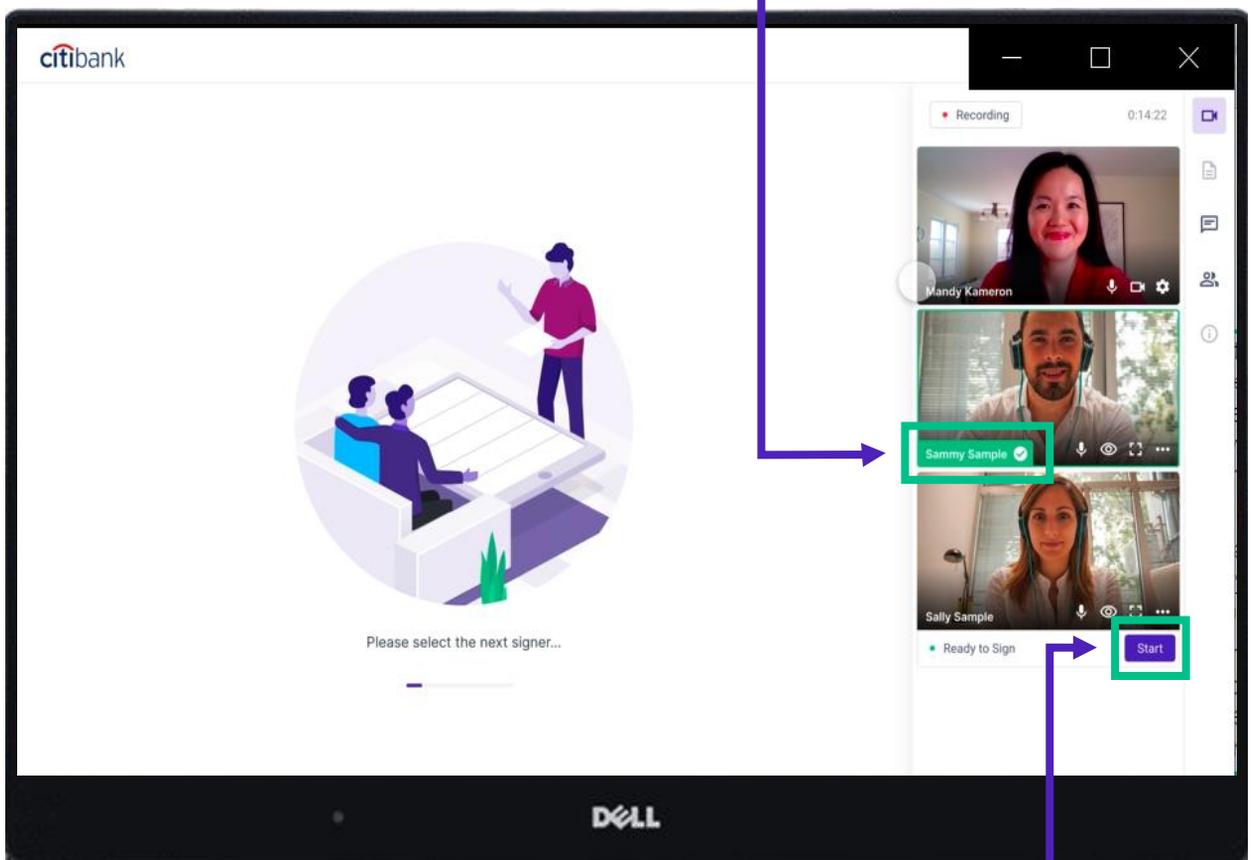


When the Notary clicks on the signature line, their signature and any other pertinent data, such as their Notary seal, will be automatically inserted.



## Status **Green** When Complete

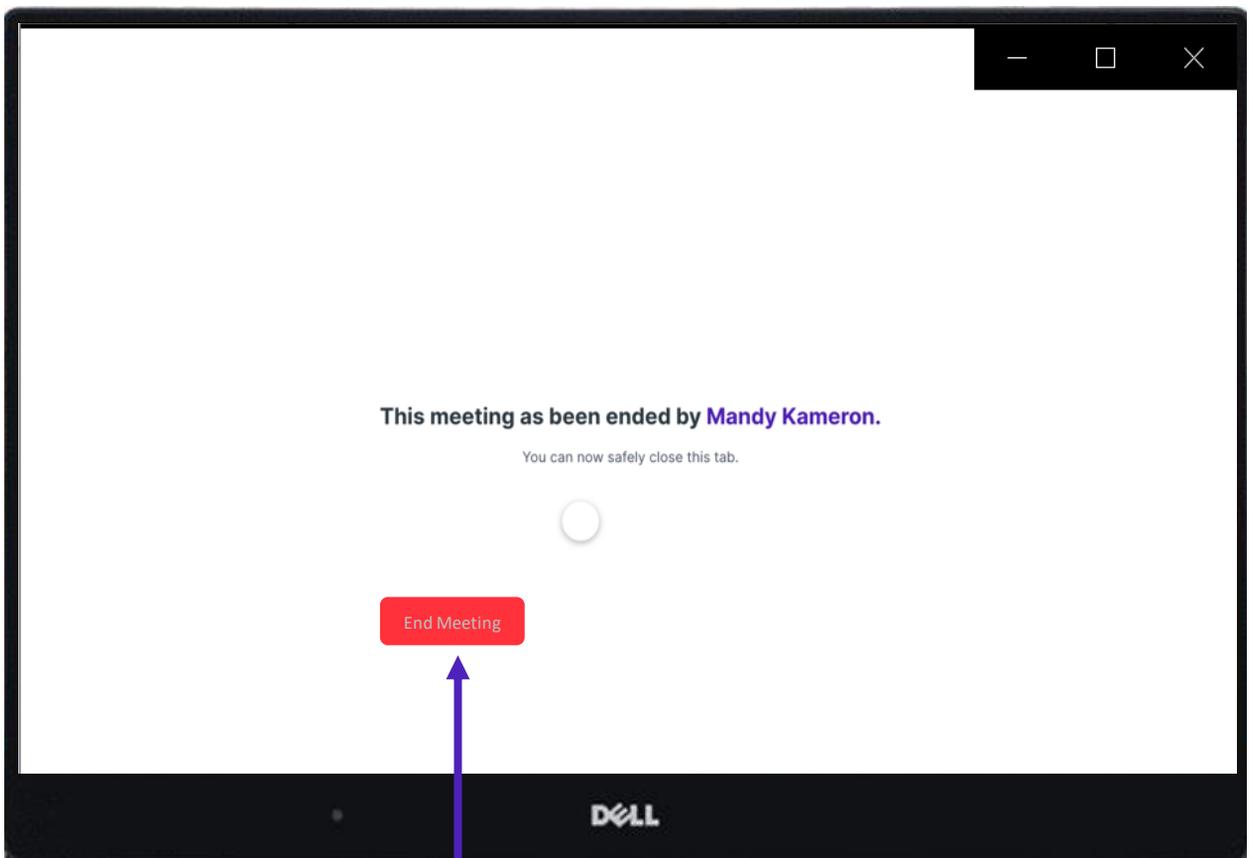
Once the first Signer is finished, the notary sees the status change to Signing Complete.



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.





eVault

# eVault – Hybrid 2

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

**Supports All Data Formats**  
Provides storage and support for all data types and formats

**Direct Connectivity**  
Direct eDelivery and seamless connectivity with the MERS® eRegistry

**End-to-end Workflow**  
Instant and easy delivery to investors, services and sub-servicers

**Limitless Options**  
Limitless integration options via robust API interface

**Validate Electronic Records**  
Automatically validates the integrity of transferable electronic records

**Manage eNote Processes**  
Manage current mortgage eNote processes and other transferable records

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

**Automated Reporting**  
Suite of automated reporting capabilities via platform

DELL



# Accessing eVault

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

The screenshot shows the DocMagic dashboard interface. At the top, there is a navigation bar with the DocMagic logo, contact information (INFO@DOCMAGIC.COM and PHONE (800) 649-1362), social media icons, and a 'DASHBOARD / LOG OUT' button. Below the navigation bar, the dashboard is personalized for 'DANIELLE! (#100DB)'. The main content area is divided into several sections:

- Launch Center:** A vertical list of application icons. The 'eVault' icon, which is a red folder with a white document, is highlighted with a red border. Other icons include eSign Console, AutoPrep, DocMagic, DocMagicXL, SmartCLOSE, LoanMagic Console, and SmartREGISTRY.
- My Documents:** A grid of document management tools including DOCUMENT FILES, FORMS MANAGER, STACKING ORDER, REPORT MANAGER, LOAN DEFAULTS, and SAMPLE DOCUMENT REVIEW.
- Account Settings:** A section for managing users, loan programs, and lender profiles.
- Compliance Edge:** Tools and resources for staying on top of compliance changes.
- Help Center:** Searchable knowledge base for common questions.
- Latest News:** A list of recent updates and deadlines.

At the bottom of the dashboard, there are two buttons: 'PARTNER ADMIN' and 'CLIENT MANAGER'. The Dell logo is visible at the very bottom of the screen.



# eVault - Information

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

The screenshot displays the eVault application interface. At the top, there is a search form with fields for Account # (100sales), Worksheet #, MIN, Loan #, and eVault Id. Below the search form are three buttons: Back, Clear, and Search. A dropdown menu shows '10' entries. A search bar is also present. Below the search form is a table with the following columns: LOAN #, BORROWER, WORKSHEET #, MIN, CONTROLLER, LOCATION, MASTER SERVICER, MODIFIED, and ACTIONS. The table contains several rows of loan data. A blue arrow points from the text box above to the first row of the table. Another blue arrow points from the text box below to the 'ACTIONS' column of the first row.

LOAN #	BORROWER	WORKSHEET #	MIN	CONTROLLER	LOCATION	MASTER SERVICER	MODIFIED	ACTIONS
77704210946	SAM SAMPLE	1496	999935377042109467	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/21/2021	  
1618938989939	Nicole Sample	1618938989939	999935389389899394	100ECL0SE	100ECL0SE	100 Sales (9999353)	04/20/2021	  
1618939034620	Jazlyn Sample	1618939034620	999935389390346203	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/20/2021	  
1618938966733	Jaiden Sample	1618938966733	999935389389667338	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/20/2021	  
1618938623277	Boris Sample	1618938623277	999935389386232771	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/20/2021	  
77704191155	SAM SAMPLE	1492	999935377041911400	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/19/2021	  
77704191118	SAM SAMPLE	1488	999935377041911186	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/19/2021	  
77704151017	SAM SMITH	1481	999935377041510178	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/15/2021	  
77704121133	SAM SAMPLE	1471	999935377041211330	FHLB - San Francisco	FHLB - San Francisco	100 Sales (9999353)	04/12/2021	  
77704120857	SAM SMITH	1470	999935377041208575	100 Sales (9999353)	100 Sales (9999353)	100 Sales (9999353)	04/12/2021	  

Click any of these icons to access the Assets.



# eVault - Assets

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

eVault Directory > Assets

## Assets

Account #: 100SALES

Authoritative Copy: Yes

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

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

Search:

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

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

Assets

Account #: 100SALES

MIN: 999935377042109467 Loan Number: 77704210946

**NOTE**  
(For Electronic Signature)

November 15, 2018 [Date] TORRANCE [City] CALIFORNIA [State]

456 MADISON AVE, MONTEBELLO, NC 90640 [Property Address]

Borrower: SAM SAMPLE  
Modified: 04/21/2021

1. **BORROWER'S PROMISE TO PAY**  
In return for a loan that I have received, I promise to pay U.S. \$ 162,000.00 (this amount is called "Principal"), plus interest, to the order of the Lender. The Lender is DSI TEST LENDER (SALES), A CALIFORNIA CORPORATION. I will make all payments under this Note in the form of cash, check or money order.  
I understand that the Lender may transfer this Note. The Lender or anyone who takes this Note by transfer and who is entitled to receive payments under this Note is called the "Note Holder."

2. **INTEREST**  
Interest will be charged on unpaid principal until the full amount of Principal has been paid. I will pay interest at a yearly rate of 3.875%.  
The interest rate required by this Section 2 is the rate I will pay both before and after any default described in Section 6(B) of this Note.

3. **PAYMENTS**  
**(A) Time and Place of Payments**  
I will pay principal and interest by making a payment every month.  
I will make my monthly payment on the first day of each month beginning on DECEMBER 01, 2018. I will make these payments every month until I have paid all of the principal and interest and any other charges described below that I may owe under this Note. Each monthly payment will be applied as of its scheduled due date and will be applied to interest before Principal. If, on November 01, 2048, I still owe amounts under this Note, I will pay those amounts in full on that date, which is called the "Maturity Date."  
I will make my monthly payments at 1800 W. 213TH STREET, TORRANCE, CA 90501 or at a different place if required by the Note Holder.  
**(B) Amount of Monthly Payments**  
My monthly payment will be in the amount of U.S. \$ 761.78.

4. **BORROWER'S RIGHT TO PREPAY**  
I have the right to make payments of Principal at any time before they are due. A payment of Principal only is known as a "Prepayment." When I make a Prepayment, I will tell the Note Holder in writing that I am doing so. I may not designate a payment as a Prepayment if I have not made all the monthly payments due under the Note.  
I may make a full Prepayment or partial Prepayments without paying a Prepayment charge. The Note Holder will use my Prepayments to reduce the amount of Principal that I owe under this Note. However, the Note Holder will use my Prepayments to reduce the accrued and unpaid interest on the Prepayment amount, before applying my Prepayment to reduce the Principal amount of the Note. If I make a partial Prepayment, there will be no charges in the due date or in the amount of my monthly payment unless the Note Holder agrees in writing to those changes.

DELL



# eVault – Uploading Assets

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

The screenshot displays the 'Assets' interface with an 'Upload Asset' modal window open. The modal contains the following fields:

- File Name: \*  No file chosen
- Title: \*
- Document Class:
- Format Id:
- Reference Id:
- eNote?

Buttons for 'Cancel' and 'Upload' are located at the bottom of the modal. Below the modal, a table lists existing assets:

Asset Name	File Name	Date	Actions
Initial Amortization Schedule <i>AmortizationSchedule</i>	ias.pmi.xml	04/21/2021	[Icons]
North Carolina Notice of Information and Examples of Amortization of Home Loans <i>Notice-Amortization</i>	nchlas.msc.xml	04/21/2021	[Icons]

At the bottom of the page, there are 'Upload' and 'Back' buttons. A green box highlights the 'Upload' button, with a purple arrow pointing to it from a text box below.

Start by clicking "Upload".



# eVault – MERS eRegistry

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

Account #: 100sales  
Worksheet #:   
MIN:   
Loan #:   
eVault Id:   
Back Clear Search  
Show: 10 entries Search:   
The table below contains the following data:

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



# eVault – MERS eRegistry

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

The screenshot displays the eVault MERS eRegistry interface. At the top left, the breadcrumb navigation shows 'eVault Directory > MERS eRegistry'. The main heading 'MERS eRegistry' is highlighted with a green box and a blue arrow pointing to it from the text box above. The account number 'Account #: 100SALES' is visible in the top right corner.

**Details**

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

**eNotes** [Unregister](#) [Transfer](#) [Create eDelivery](#)

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

**Rights Holders** **Current** [Previous](#)

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

**Activity Log**

TYPE	TRACKING #	INITIATED DATE	EFFECTIVE DATE	STATUS	ACTIONS
------	------------	----------------	----------------	--------	---------

The DELL logo is visible at the bottom center of the interface.



# eVault – Authoritative Copy

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

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

The screenshot displays the MERS eRegistry interface for a specific loan. The 'Details' section shows the following information:

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

The 'eNotes' section includes buttons for 'Unregister', 'Transfer', and 'Create eDelivery'. The 'Active' status is 'Yes', and the 'Authoritative Copy' status is highlighted in a green box with the value 'Yes'. Other fields include 'Registered' (04/21/2021), 'Note Signed' (04/21/2021), 'Signature Validation' (Y), and 'Assumption' (N).

The 'Rights Holders' section shows the 'Current' holder as '100 Sales (9999353)' with an 'Updated' date of '04/21/2021'. Other fields include 'Location' (100 Sales (9999353)), 'Master Servicer' (100 Sales (9999353)), 'Subservicer', 'Secured Party', and 'Secured Party Delegatee' (Delegatee for Transfers).

The 'Activity Log' section has a table with columns: TYPE, TRACKING #, INITIATED DATE, EFFECTIVE DATE, STATUS, and ACTIONS.

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



# eVault – MERS Transfer

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

The screenshot displays the eVault MERS eRegistry interface. On the left, the 'MERS eRegistry' details for a specific note are visible, including the MIN # (999935377042109467) and Loan # (7770421094). The 'eNotes' section shows a 'Transfer' button highlighted with a green box. A modal window titled 'MERS Transfer' is open, showing a form with the following fields: 'Action: \*' (Transfer of Control & Location), 'Effective Date: \*' (04/21/2021), 'Controller: \*' (Fannie Mae), 'Location: \*' (Fannie Mae), and 'eDeliver: \*' (checked). The 'Transfer' button is highlighted in orange. The interface also includes sections for 'Rights Holders' and an 'Activity Log' table with columns for TYPE, TRACKING #, INITIATED DATE, EFFECTIVE DATE, STATUS, and ACTIONS.



# eVault – MERS Transfer

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

The screenshot displays the eVault MERS eRegistry interface. On the left, the 'MERS eRegistry' details are shown, including the MIN # (999935377042109467) and Loan # (7770421094). The 'eNotes' section has a 'Transfer' button highlighted with a green box. A modal window titled 'MERS Transfer' is open, showing the following fields: Action (Transfer of Control & Location), Effective Date (04/21/2021), Controller (Fannie Mae), and Location (Fannie Mae). The 'eDeliver' checkbox is checked and highlighted with a green box. At the bottom of the modal, the 'Transfer' button is highlighted with a green box. A blue arrow points from the top text box to the 'Transfer' button in the modal, and another blue arrow points from the 'Transfer' button in the modal to the bottom text box.

Click Transfer when done.



# eVault – Authoritative Copy

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

The screenshot displays the MERS eRegistry interface. At the top, it shows 'eVault Directory' and 'MERS eRegistry'. The main title is 'MERS eRegistry' with 'Account #: 100SALES' on the right. Below this is a 'Details' section with fields for MIN # (999935377041211330), Loan # (77704121133), Borrower # (SAM SAMPLE), and Created (04/12/2021). The 'eNotes' section includes buttons for 'Unregister', 'Transfer', and 'Create eDelivery'. A table shows 'Active' (Yes), 'Authoritative Copy' (No), 'Registered' (04/12/2021), 'Note Signed' (04/12/2021), 'Inactivated', 'Inactivated Status', 'Signature Validation' (Y), and 'Assumption' (N). The 'Rights Holders' section has tabs for 'Current' and 'Previous'. It lists 'Controller' (FHLB - San Francisco), 'Location' (FHLB - San Francisco), 'Updated' (04/14/2021), 'Secured Party', 'Master Servicer' (100 Sales (9999353)), 'Subservicer', and 'Secured Party Delegatee' (Delegatee for Transfers). The 'Activity Log' section has a table with columns: TYPE, TRACKING #, INITIATED DATE, EFFECTIVE DATE, STATUS, and ACTIONS. A row shows 'Delivery' with tracking # 471938, initiated date 04/14/2021, and status 'Success'. A Dell logo is at the bottom of the screen.

Here you can see the location of the rights holders.



# eVault – Transfer Servicing

To transfer servicing, you can click here again.

The screenshot displays the eVault MERS eRegistry interface. On the left, the 'MERS eRegistry' page shows details for a loan with MIN # 999935377041211330 and Loan # 7770412. The 'eNotes' section includes buttons for 'Unregister', 'Transfer', and 'Create'. A blue arrow points from a text box above to the 'Transfer' button. A 'MERS Transfer' modal window is open, showing the following fields:

- Action: \* Transfer of Servicer
- Effective Date: \* 04/21/2021
- Master Servicer: \* Midwest Loan Services
- Subservicer: Midwest Loan Services
- eDeliver:

At the bottom of the modal are 'Cancel' and 'Transfer' buttons. Below the modal, the 'Rights Holders' section shows 'Current' and 'Previous' tabs, with 'Current' selected. The 'Activity Log' table is visible at the bottom:

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





Final Actions & Confirmation

# Back to the Settlement Agent Portal

The Settlement Agent can eSign by clicking on the Open Signing Room Button.

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

Key sections of the interface include:

- 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: 12:00 PM 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. The Settlement Agent signer (Sally Settlement) has a green box around the "Open Signing Room" button.
- Documents (16):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. All listed documents are completed.

#	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	✉️ ⚙️	📄 ⚙️	● Finished	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	✓



# 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, the breadcrumb navigation reads "DocMagic eClose console (Notary)". Below this, there are four main sections: "LOAN", "LENDER", "SETTLEMENT AGENT", and "COUNTDOWN TO CLOSING". The "LOAN" section includes fields for Loan #, Primary Borrower, Type, Package ID, and Worksheet #. The "LENDER" section lists Company, Contact, Email, and Phone. The "SETTLEMENT AGENT" section lists Company, Contact, Email, and Phone. The "COUNTDOWN TO CLOSING" section shows a timer for Days (0), Hours (1), Minutes (26), and Seconds (43), along with the Date and Time.

Below these sections is a navigation bar with tabs for "Details", "eJournal", and "Action Log". The "eJournal" tab is highlighted with a green box. A purple arrow points from the text box above to this tab.

Under the "eJournal" tab, there is a "Journal" section with a table of entries. The first entry is for "John Smith" on "November 9, 2021 • 10:32am PST". A green box highlights a down arrow icon at the end of this row. A purple arrow points from the text box below to this icon.

Below the "Journal" section is a "Recordings" section with a table of entries. The first entry is for file "417659\_2021-11-09T18:27:54.132Z.mp4" recorded on "November 9, 2021 • 10:27am PST".

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)", a search bar containing "Who can see your viewing activity?", and a user profile icon labeled "Doc". Below the navigation bar, there are three main sections: "LOAN", "LENDER", and "SETTLEMENT AGENT".

- 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

On the right side, there is a "COUNTDOWN TO CLOSING" section with a table showing days, hours, minutes, and seconds. The date is Apr 19, 2023 (Wed) and the time is 12:00am PDT. There is an "Edit" link.

Below these sections, there are tabs for "Details", "eJournal", and "Action Log". The "eJournal" tab is selected.

The main content area is titled "Journal" and shows a table with columns for "#", "Signer", and "Notarization Date and Time". There is one entry for "John Smith" on "November 9, 2021 • 10:32am PST".

Below the table, there is a form for the signer's details. The "Notarial Service" section is highlighted with a green box. It contains a table with two columns: "\*Notarial Service" and "Fee".

*Notarial Service	Fee
Acknowledgement	\$0.00
Jurat	\$0.00
Affidavit	\$0.00

At the bottom right of the form, there are "Cancel" and "Save" buttons. The "Save" button is highlighted with a purple box.

Enter the fee for each Notarial Service performed here.



# eJournal

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, the header includes the DocMagic logo, the text "eClose Console (Notary)", and a user profile icon labeled "Doc". Below the header, there are several informational boxes: "Package ID: 437477", "Worksheet #: 2192 (Version: 1)", and two contact cards for "leah@docmagic.com" with phone numbers (817) 881-2003 and (987) 555-4321. The main navigation bar includes "Details", "eJournal", and "Action Log".

The "Journal" section is active, showing 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 for the first entry, including:

- 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: John Smith.
- Identification Details:** Driver's License: 123456 • Exp. 4/14/2022.
- Document Notarized:** MERS New Jersey Mortgage (Dec 15, 2021 • 1:39pm CST) and Signature Affidavit and AKA Statement (Dec 15, 2021 • 1:40pm CST).
- \*Notarial Service:** Acknowledgement (\$0.00) and Affidavit (\$0.00).
- Buttons:** Cancel and Save.

The "Recordings" section is highlighted with a green border and contains a table with the following data:

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

A blue arrow points from the "Recordings" table to the text box below.

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



# eJournal

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, the header includes the DocMagic logo, the text "eClose Console (Notary)", and a user profile icon labeled "Doc". Below the header, there are navigation tabs for "Details", "eJournal", and "Action Log". 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 journal entry for John Smith. It includes sections for "Signer's Details", "Document Notarized", "Notarial Service", and "Fee". The "Signer's Details" section lists John Smith's address (222333 PEACHTREE PLACE, ATLANTA, GA 30318), contact information (Mobile: (562) 652-2578, Home: (502) 767-8509, Email: shandi@docmagic.com), and a signature field containing "John Smith". The "Document Notarized" section lists "MERS New Jersey Mortgage" and "Signature Affidavit and AKA Statement". The "Notarial Service" section shows "Acknowledgement" and "Affidavit" with a dropdown menu. The "Fee" section shows "\$0.00" for both services. There are "Cancel" and "Save" buttons at the bottom right of this section.

Below the journal entry, there is a "Recordings" section with a table:

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

A blue arrow points from the "Download" button (represented by a 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 (Notary) interface. At the top, there's a navigation bar with the DocMagic logo and a user profile icon. Below this, there are four main sections: LOAN, LENDER, SETTLEMENT AGENT, and COUNTDOWN TO CLOSING. The LOAN section shows details for Loan # 1638481916201, Primary Borrower John Smith, Type EClosing, Package ID 417659, and Worksheet # 1638481916201. 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 strull@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 are tabs for Details, eJournal, and Action Log. The Action Log tab is selected and highlighted with a green box. The Action Log table has columns for Date & Time (PST), User Name, IP Address, and Description. The table contains six rows of activity. At the bottom of the Action Log table, there is a text input field with a green border and a button labeled 'Add Internal Note To 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

You may also add notes at the bottom.

