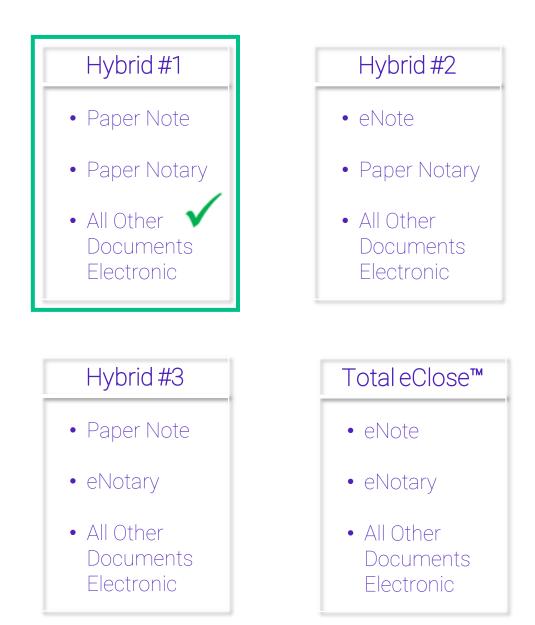


GUIDEBOOK

## Hybrid 1 eClose





## Hybrid 1 eClose Process

Processing Closing Documents in Your LOS	4
<ul><li>✓ Selecting DocMagic eSign for Hybrid 1</li><li>✓ Sending Closing Documents</li></ul>	
Lender Portal	10
<ul> <li>✓ Monitor Activity</li> <li>✓ Reminder Emails</li> <li>✓ Documents Tab</li> </ul>	
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<ul> <li>✓ eClose Console Tabs         <ul> <li>Details</li> <li>eJournal</li> <li>Action Log</li> </ul> </li> <li>✓ AutoPrep<sup>™</sup></li> <li>✓ Wetsign with QR Code</li> </ul>	
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<ul><li>✓ Portal sign-in / Features</li><li>✓ Signing Experience</li></ul>	
Final Actions & Confirmation	74





#### 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.

Sample, Sammy (5) immary Data Folder Borrower Information can Application 1 can Application 2 can Application 3 can Application 4 .can Application 5	Complex, Sammy J   Chuling Costs W           Date Prepared         2010019           Confiner Receipt Costing Disclosure         Ver           Loan Information         172.000           Ibernerst Rate         4375           w/ MIP, FF         378.510.00	Closing Documents >> Flood Certification > Initial Disclosures > Title/Escrow > Verifications > Vering Date	umante
.com Application-Addendum Prequalification Amortization Schedule Rent vs. Own Sash-To-Close	Term/Due In         360 / 360 mths           MIC #         123465	Closing Date Disbursement Date 1st Payment Date	1/1/3013 0 1/1/4/2018 0 ESC/12/19 0
oan Comparison Fees Worksheet Loan Estimate Bood Faith Estimate Service Providers List HOEPA Homeownership Counse Josing Costs Worksheet	Vise RCMC 1	or "Paid To" Broker Company Name or "Paid To" Lender Company Name or "Paid To" Investor Company Name	PFC - Prepad Finance (Narge (APR Ibums) FPHA Allowable POC- Prad Ownals de Closing FIN - Financed for GM Obsck AII Financed ON - Veckdeel in Tode Ponts and Fast
Closing Dacksere Wahn, Lat of Service Providers HJD-1A Stervice Providers HJD-1A Stellement Statement HJD-1A Stellement Statement Trah-bit Landigo Trah-bit Landigo HJD Land Committee Combined Transmittal - New Mit Land Committee State State State State State State State Mit Landigo Mit Landi	Loan Discount Credits Credits Copy as a Lender Credit at the Bottom of T Loan Level Pricing Adjustments: Rate Lock Edension Fee Rate Lock Fee	State Bona Fide	Amount Paid By PPC/F/POC/FN/GM
Flood Hazard Notice flome Equity Line of Credit (HELt		Lender • RCMC	



### Closing Documents in Your LOS

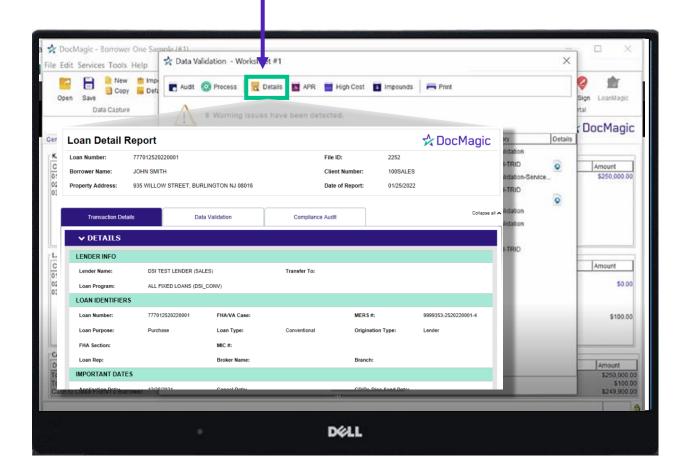
If using DocMagic Online, choose Closing from the Loan Stage here.

WEL Provide Copy P		Process View Generate Delivery	UCD Collaboration esign LoanMagic Portal	IBOARD
General     Borrowers/Seilers     Propert       Constraint     Loan Stage     CLOSING       Broker Name     Broker Name       Origination     Loan Type       Loan Purpose     PURCHASE       Type     Lien Position       Loan Number     LOANNUMBEF       MiC / Agency #     Loan Identifiers	NNS (DSL_CONV)	Underwriting     Closing     Summaries       Add     Application Date       Fre-2 Send Date     Estimate Issue Date       Estimate Issue Date     Estimate Issue Date       Estimate Issue Date     Estimate Issue Date       Colored Date     Colored Date       V     Add       V     Colored Date       Colored Date     Colored Date       Rate Lock Date     Colored Date       Colored Jose Date/Method     Colored Date       Closing Date     Closing Date       Closing Date     Closing Date       Closing Date     Closing Date       Disbursement Date     Disbursement Date		tounts for
Press to display Impound Account Ana	ilysis			



#### Loan Detail Report

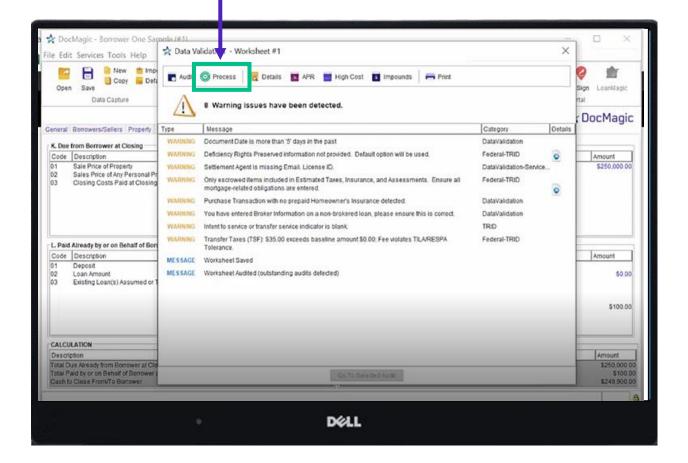
#### Optional: Click here to see the Loan Detail Report before you process.





#### Processing Documents – Hybrid 1

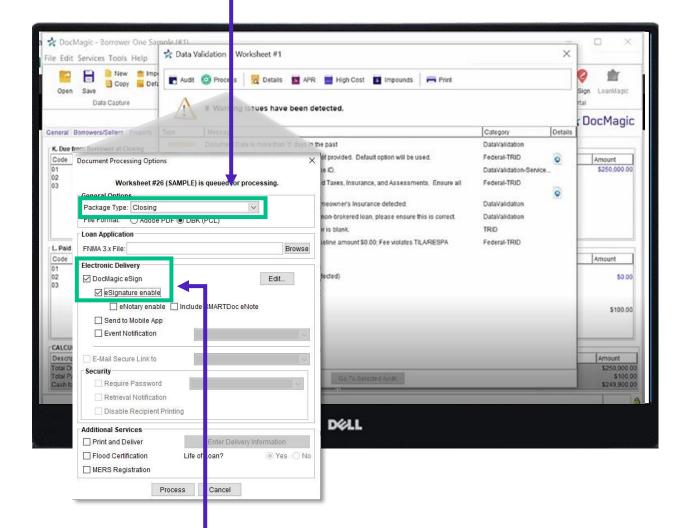
#### Process the Document set.





#### Processing Documents – Hybrid 1

Choose "Closing" for Package Type.



Select DocMagic eSign if utilizing DocMagic eSign Platform AND Select eSignature enable.





#### Lender Portal

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

				Scheduler	Wonitoring	Accounts	eSign Reques	is Create	Request S	search	Account -
										Ret	urn to Search
Loan #: 777100313 Primary Name: John Smit Type: EClosing Package Id: 604282 Worksheet #: 2990 (Vers Closing Date: 9/30/22	th	Lender:	Ron Carrillo DSI TEST LEN ron@docmagic (708)531-9060		S) (100SALE	S)	Documents: Signers:	3 N/A (Requ		у)	
Details Documents	Documents Received	EMails Versions								P 9	
articipants 🛃										Previe	w Mode - Off
Name/Email		Role	Created	Started 0	Consented	Viewed	Completed	Declined	Links		
John Smith ron@docmagic.com		Borrower	10/3/22 1:54 PM						Send E Sign Di		
Andy Agent ron@docmagic.com		Settlement Agent	10/3/22 1:54 PM						Send E Go Agent F		
ction Log											
Date	User	IP A	ddress		ription						
Date 10/3/22 1:54 PM	System User	IP A	ddress	eSig	n event create						
Date 10/3/22 1:54 PM 10/3/22 1:54 PM	System User John Smith	IP A	ddress	eSig Invita	n event create ation sent to re	on@docma					
Date 10/3/22 1:54 PM	System User	IP A	ddress	eSig Invita	n event create	on@docma					
Date 10/3/22 1:54 PM 10/3/22 1:54 PM	System User John Smith	IP A	ddress	eSig Invita	n event create ation sent to re	on@docma on@docma					
Date 10/3/22 1:54 PM 10/3/22 1:54 PM	System User John Smith	IP A	ddress	eSig Invita	n event create ation sent to re ation sent to re	on@docma on@docma			Cancel Reque	ist De	ilete Request
Date 10/3/22 1:54 PM 10/3/22 1:54 PM 10/3/22 1:54 PM	System User John Smith Andy Agent	IPA	ddress	eSig Invita	n event create ation sent to re ation sent to re	on@docma on@docma					
Date 10/3/22 1:54 PM 10/3/22 1:54 PM	System User John Smith Andy Agent	IPA	ddress	eSig Invita	n event create ation sent to re ation sent to re	on@docma on@docma					lete Request / Terms of Use
Date 10/3/22 1:54 PM 10/3/22 1:54 PM 10/3/22 1:54 PM	System User John Smith Andy Agent	IP A		eSig Invita	n event create ation sent to re ation sent to re	on@docma on@docma					
Date 10/3/22 1:54 PM 10/3/22 1:54 PM 10/3/22 1:54 PM	System User John Smith Andy Agent	IP A		eSig Invita Invita	n event create ation sent to re ation sent to re	on@docma on@docma					
Date 10/3/22 1:54 PM 10/3/22 1:54 PM 10/3/22 1:54 PM	System User John Smith Andy Agent	IP A		eSig Invita Invita	n event create ation sent to ro ation sent to ro Add Interna	on@docma on@docma		Home			
Date 10/3/22 1:54 PM 10/3/22 1:54 PM 10/3/22 1:54 PM	System User John Smith Andy Agent		Dé	eSig Invita Invita	n event create ation sent to ro ation sent to ro Add Interna	on@docma on@docma		Home	Contact Priva		

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



#### Lender Portal

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

		sole - Stev					an de antina ensi		s eSign Reques			والماسينين والمتحديد والم
	Primary Name:	EClosing 604282 2990 (Vers	h	Lender:		ENDER (SAI gic.com	LES) (100SALE	S)	Signers:	N/A (Require	bages)	Return to Search
	Details Do		Documents Received	EMails Versions								🕒 흤 🖨 🎓 🔒 Preview Mode - Of
#	Name/Email			Role	Created	Started	Consented	Viewed	Completed	Declined	Links	
1	John Smith	com		Borrower	10/3/22 1:54 PM	Started	Consented	viewed	Completed		Send Ema	ail
3	Andy Agent ron@docmagic.	com		Settlement Agent	10/3/22 1:54 PM						Send Ema Agent Por	
4	Notary_name			Notary	10/3/22						Send Ema	
Ac	NOTARY_EMAI	L_PLACEHOLD	ER-1		1:54 PM							
	tion Log	L_PLACEHOLD	User	IP A	1:54 PM	De	scription					
Dat	tion Log	L_PLACEHOLD		IP A			<b>scription</b> Sign event creat	ed				
Dat 10/	tion Log	L_PLACEHOLD	User	IP A		eS In	sign event creat vitation sent to	ron@docm	-			
Dat 10/ 10/	<b>tion Log</b> • 3/22 1:54 PM	L_PLACEHOLD	<i>User</i> System User	IP A		eS In	ign event creat vitation sent to vitation sent to	ron@docm ron@docm	-			
Dat 10/ 10/	tion Log 3/22 1:54 PM 3/22 1:54 PM	L_PLACEHOLD	User System User John Smith	IP A		eS In	sign event creat vitation sent to	ron@docm ron@docm	-	Са	ncel Request	Delete Request
Dat 10/ 10/	tion Log 3/22 1:54 PM 3/22 1:54 PM 3/22 1:54 PM		User System User John Smith	IP A		eS In	ign event creat vitation sent to vitation sent to	ron@docm ron@docm	-			



#### Lender Portal

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

☆ eSign C	on: ole - Steve Truitt				Schedule	r Monitoring	Accounts eSign Request	s Create Reque	st Searcl	h 💄 Account 👻
Loar Primary Nar Ty Package Workshee Closing Da	ne: John Smith pe: EClosing ld: 604824 t#: 2990 (Version : 2)	Lender:	struitt@			ES) (100SALE	S) Documents: Signers: Expires:	New (Active) 15 (55 total page 2 N/A (Requires: P Y (Ink Sign)	,	
Details	Documents Documents Received EMails	Versions							<b>B</b>	A 🖶 🌫 🖶
Document	5 🔁 🔏									
Document	Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed Sig	greg 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	Т	5175539   5187040	us3200.not.xml	M	ark as Complete
3 New Jers	ey Mortgage (MERS)		0/19	1	1		5175540   5187041	nj3031.mzm.xml	M	ark as Complete
4 Uniform F	esidential Loan Application	<b>~</b>	7	1	1		5175541   5187042	urla.msc.xml		
5 Uniform F	esidential Loan Application - Lender Loan Information	<b>~</b>	2	0	0	<b>v</b>	5175542   5187043	urlalli.msc.xml		
6 Addendur	n to Closing Instructions	<b>~</b>	1	1	1		5175543   5187044	atci3.msc.xml		
7 Specific C	losing Instructions	<b>~</b>	3	4	2		5175544   5187045	sci.msc.xml		
8 Hazard In	surance Authorization and Requirements	<b>~</b>	2	1	1		5175545   5187046	hazard8.lsr.xml		
9 IVES Rec	uest for Transcript of Tax Return	<ul> <li>Image: A second s</li></ul>	2	2	1		5175546   5187047	4506c.msc.xml		
10 Closing D	isclosure	<b>~</b>	5	1	1		5175547   5187048	cd.dsc.xml		
11 Customer	Identification Verification	<b>~</b>	2	0	0	<b>v</b>	5175548   5187049	civ.msc.xml		
12 Initial Esc	row Account Disclosure Statement	<b>~</b>	2	1	1		5175549   5187050	ieads.msc.xml		
13 New Jers	ey Initial Tax Authorization Notice	<b>~</b>	1	0	0	<b>v</b>	5175550   5187051	njitan.msc.xml		
14 New Jers	ey Private Well Testing Act Certification	<b>~</b>	1	1	1		5175551   5187052	njpwt.msc.xml		
15 Signature	Affidavit and AKA Statement		0/2	1	1		5175552   5187053	saakas.msc.xml	Ma	ark as Complete
						Add Interna	I Note			
				Dé	<b>4</b> L					

You can check the status of the signature process here.

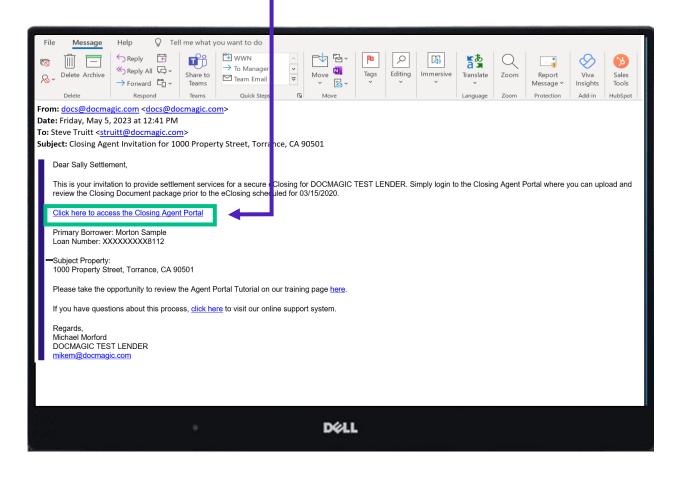




#### Settlement Agent Invitation Email

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.

🐴 eSign	
Company Logo 🎾	Welcome Sally! Congratulations on your decision to use DocMagic's Total eClose solution. The Closing Agent Portal provides you with the ability to review the Closing Documers, add Title Documents for execution, and facilitate the execution of the Closing event.
	Enter the Viewing Code Viewing Code 7611 Continue to Next Step
© Copyright 2021 DocMagic, Inc ALL RIGHTS RESERVED	
	Déll



#### 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.

A DocMagic eClose Console (Se	ettlement Agent)					🙆 Sally 🗸
LOAN Loan #: 777-1616630796081 Primary Borrower: Erics Sample Type: EClosing Package ID: 333727 Worksheet #: 1616630796081 (Versio	vr: 1)	Company: DSI TEST LENDE Contact: Michael Morford Email: mikem@docmagi Phone: (800) 649-1362		-	CLOSING IOURS MINUTI  ied) Time: 12:00am PD	-
Details 🖹 eJournal	Action Log					Ready to Close
Signers (2)						
# Signer Name / Email Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1 Erica Sample 1 erica.sample@example.c Borrower	Notary_name_placeholde NOTARY_EMAIL_PLACE	3/25/2021 - 12:00am	0 412	0	Not Started	Open Signing Room
2 Sally Settlement sally.settlement@exampl Settlement Agent	Unassigned				Ready to Sign	Open Signing Room
Documents (15) 🚦 🖋 🎘 🔒	0				Previe	w Mode ON
Documents (15) 🚦 🖋 🗋 🖨	۵		Page(	s) 5	Previe igner(s)	w Mode ON
	۵		Page{ 9	s} S		
# eSign Enabled	۵			s) S	igner(s)	Completed
eSign Enabled     Uniform Residential Loan Application	۵		9	s) S	igner(s) 1	Completed
eSign Enabled     Uniform Residential Loan Application     MERS California Deed of Trust     Specific Closing Instructions	۵		9 16	s) S	igner(s) 1 2	Completed
e Sign Enabled  Uniform Residential Loan Application  MERS California Deed of Trust  Specific Closing Instructions  California Hazard Insurance Disclosure	۵		9 16 3 1	s) S	igner(s) 1 2 2	Completed
eSign Enabled     Uniform Residential Loan Application     MERS California Deed of Trust     Specific Closing Instructions     California Hazard Insurance Disclosure     Hazard Insurance Authorization and Requirements	۵		9 16 3 1 2	s) S	igner(s) 1 2 1 1	Completed
e Sign Enabled  Uniform Residential Loan Application  MERS California Deed of Trust  Specific Closing Instructions  California Hazard Insurance Disclosure	•		9 16 3 1	s) S	igner(s) 1 2 2	Completed



## Countdown Clock

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

Close Console (Settlement Agent)			🙆 Sally 🗸
	ompany: DSI TEST LENDER (SALES) Contact: Michael Morford Email: mikem@docmagic.com Phone: (800) 649-1362	COUNTDOWN TO CLOSING	NUTES SECONDS  n PDT Edit
🔠 Details 🖹 eJournal 🎾 Action Log			📸 Ready to Close
Signers (2)			
# Signer Name / Email Role Notary Name / Email	Notary Type / KBA / Statu Closing Date - Time	s ID Verify / Status Status	eSign
Erica Sample         Borrower         Notary_name_placeholde           1         erica sample@example.c         Borrower         NOTARY_EMAIL_PLACE	3/25/2021 - 12:00am	🕞 🔿 🔹 Not Started	Open Signing Room
2 Sally Settlement sally settlement@exampl Settlement Agent Unassigned		Ready to Signature	Open Signing Room
Documents (15) 📑 🖋 🖪 🔒 🚯		F	review Mode ON
# eSign Enabled	Pa	ige(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.

Close Console (Settlement Agent)			🔕 Sally 🔻
LOAN Loan #: 777-1616630796061 Primary Borrower: Erica Sample Type: EClosing Package ID: 333727 Worksheet #: 1616630796081 (Version: 1)	d agic.com	– My Accour	it 25
Betalls     Image: Constraint of the second se		Help	
#         Signer Name / Email         Role         Notary Name / Email         Notary Type / Closing Date - Time           1         Erica Sample erica sample@example.c         Borrower         Notary_name_placeholde         325/2021 - 12:00am           2         Sally Settlement sally settlement@example         Settlement Agent         Unassigned.	KBA / Status ID Verify / S	Sign Out	Open Signing Room
Documents (15) 🖹 🖋 🗋 🖨		Previet	w Mode ON
# eSign Enabled	Page(s)	Signer(s)	Completed
1 Uniform Residential Loan Application	9	1	$\checkmark$
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	~
• D&LL			



## Signer's Tab

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

🛧 Doc	1agic eClose Console (Settlement Agent)			🙆 Sally 🕶
		ompany: DSI TEST LENDER (SALES) Contact: Michael Morford Email: mikem@docmagic.com Phone: (800) 649-1362	COUNTDOWN TO CLOSING DAYS HOURS MINUTE  Date: Apr 19, 2023 (Wed) Time: 12:00am PDT	-
Signers	(2) &+			Ready to Close
1 Erica erica. Sally	er Name / Email Role Notary Name / Email Sample Sample@example.c Settlement Settlement@exampl SettlementAgent Unassigned	Notary Type / Closing Date - Time KBA / Status 3/25/2021 - 12:00am 🖅 🔿	ID Verify / Status Status  C  C  C  C  C  C  C  C  C  C  C  C  C	eSign Open Signng Room Signng Room
Docume	ents (15) 🖹 🖋 🖪 🖨 🙆			w Mode ON
# eSig	in Enabled	Page		Completed
1 Unifo	rm Residential Loan Application	9	1	×
2 MER 3 Speci	S California Deed of Trust ific Closing Instructions	3	2	~
4 Califo	ornia Hazard Insurance Disclosure	1	ť	~
5 Haza	rd Insurance Authorization and Requirements	2	1	~
-6 Borro	wer Consent to the Use of Tax Return Information	1	4	<u>~</u>
		DØLL		



Click on the signer's name to view, edit, or delete participant information. Make sure there is an email listed.

🛧 DocMa gic 🛛 eClose Co	onsole (Settlement Agent)	(	🙆 Sally 🗸
LOAN Loan #: 777 8 mary Borrower: Ef	Participant Details		SECONDS
Type: E Package ID: 2 Worksheet #:	View, ed	it, or delete the participant's information below	Edit
E Details	First Name:	Erica	Ready to Close
Signers (2)	Last Name:	Sample	eSign
1 Erica Sample	Email:	erica.sample@example.com	Open Signing Room
z sally.settlement@exampl	Phone Number:		Open Signing Room
# eSign Enabled	Access Code:	0001	ode ON
1 Uniform Residential Loan Application	Role:	Borrower	ŕ
2 MERS California Deed of Trust 3 Specific Closing Instructions		Cancel Delete Save	ĺ.
4 California Hazard Insurance Disclosu 5 Hazard Insurance Authorization and Reg	uirements	2 1	
6 Borrower Consent to the Use of Tax Retu	Im Information	i i	~
		DØLL	



#### Adding Participants

Click on the Silhouette Icon to add a participant.

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

<complex-block><complex-block><complex-block></complex-block></complex-block></complex-block>	LOAN Left 277.599999799097   Loan All are consert   Loan All are consert   Loan All are participant's information below   Loan Left 2000   Left 2000 <t< th=""><th></th><th></th><th></th><th>and the second se</th></t<>				and the second se
Pring brown: Fee Supre to some print t	Pinna Kurreir: Example   Pinna Kurreir:	Close Console (S	ettlement Agent)		Sally ▼
Image: Signer Name / Enail     I Signer Name / Enail     I Enais Sample   I enais Saly Settement[Boxanpl.     Documents (15)   I esign Enabled     I undom Residential Lean Application   I undom Residential Lean Application   I undom Residential Lean Application   I esign Enabled     I undom Residential Lean Application   I undom Residential Lean Application </th <th>Image: Signer Name / Enail   I Signer Name / Enail   I Signer Name / Enail   I sign stratened   I sign stratened   I undom Residential Lean Application   I undom Residentiation and Requirementis   I undom Residentiation and Requirementis   <t< th=""><th>Primary Borrower: Erica Sample Type: EClosing P ckage ID: 333727</th><th>Participant</th><th>× Hours</th><th>MINUTES SECONDS</th></t<></th>	Image: Signer Name / Enail   I Signer Name / Enail   I Signer Name / Enail   I sign stratened   I sign stratened   I undom Residential Lean Application   I undom Residentiation and Requirementis   I undom Residentiation and Requirementis <t< th=""><th>Primary Borrower: Erica Sample Type: EClosing P ckage ID: 333727</th><th>Participant</th><th>× Hours</th><th>MINUTES SECONDS</th></t<>	Primary Borrower: Erica Sample Type: EClosing P ckage ID: 333727	Participant	× Hours	MINUTES SECONDS
I Signer Name / Enail:   1 Enail:   1 Enail:   1 enca sample@cample.c.   2 Sally Settlement@campl   3 Sally Settlement@campl   4 Unitorm Residential Loan Application   2 Specific Closing Instructions   3 Specific Closing Instructions   4 California Hazard Insurance Authorization and Requirements   5 Hazard Insurance Authorization and Requirements   6 Borrower Consent to the Use of Tax. Return information	I Signer Name / Enail:   1 Enca Sample gevample   2 Sally Settlement gevample   3 Sally Settlement gevample   access Code: Role: Select Role   0 Not S   1 Unitorm Residential Lean Application   2 Sepcific Closing Instructions   3 Specific Closing Instructions   4 California Hezard Insurance Authorization and Requirements   5 Hazard Insurance Authorization and Requirements   6 Borrower Consent to the Use of Tax. Return Information	E Details			管 Ready to Close
1       etca sample@example c         2       Saly Settement         saly Settement@exampl       Access Code:         Documents (15)       Image: Select Role         #       eSign Enabled         1       Uniform Residential Lean Application         2       Select Closing Instructions         3       2         4       California Hezard Insurance Authorization and Requirements         5       Hazard Insurance Authorization and Requirements         6       Borrower Consent to the Use of Tax. Return Information	1       eice a sample @example c       Saly Settlement]       Saly Settlement]       Saly Settlement]       Open         2       saly settlement]       Role:       Settlement]       Settlement]       React lo Sign       Open         0       e Sign Enabled       Preview Mode       N       N       No       No         1       Unform Residential Lean Application       9       1       V       N       N         2       MERS California Deed of Trust       16       2       V       1       V         3       Specific Closing Instructions       3       2       V       1       V         4       California Hazard Insurance Authorization and Requirements       2       1       V       V       V         6       Borrower Consent to the Use of Tax Return Information       1       1       V <t< td=""><td># Signer Name / Email</td><td></td><td>Verify / Status</td><td></td></t<>	# Signer Name / Email		Verify / Status	
Role:       Select Role       Preview Mode         Image: Instructions       Signer(s)       Completed         1       Unitom Residential Loan Application       9       1       Image:	Role:       Select Role       Preview Mode         Image: Instruction Residential Loan Application       9       1       Signer(s)       Completed         1       Unitorm Residential Loan Application       9       1       Image:	erica.sample@example.c			Open
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       ✓	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 (15) 📑 🖉			
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       ~	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       ~				i Sana
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       ✓	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       ✓		I		
5 Hazard Insurance Authorization and Requirements 2 1 6 Borrower Consent to the Use of Tax Return Information 1 1 1	5 Hazard Insurance Authorization and Requirements 2 1 6 Borrower Consent to the Use of Tax Return Information 1 1 1	3 Specific Closing Instructions		3 2	~
Borrower Consent to the Use of Tax Return Information     1     1	-6 Borrower Consent to the Use of Tax Return Information	4 California Hazard Insurance Disclosure		1 1	~
		5 Hazard Insurance Authorization and Requirements		2 1	~
D≪ LL	- De LL	6 Borrower Consent to the Use of Tax Return Information		1 1	
			DK LL		

Click Add and they will be saved to the participants list.



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.

LOAN Loan #: 777-1616630796081 Primary Borrower: Erica Sample Type: EClosing Package ID: 333727 Worksheet #: 1616630796081 (Versio	n: 1)	Company: DSI TEST LENDI Contact: Michael Morford Email: mikem@docmag Phone: (800) 649-1362	C.com	PTDOWN TO CLOSING	UTES CONDS  PDT Edit
🗐 Details 🖹 eJournal	Action Log				👻 Ready 🤉 Close
Signers (2)					
# Signer Name / Email Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status ID Ve	erify / Status Status	enign
Erica Sample 1 erica.sample@example.c Borrower	Notary_name_placeholde NOTARY_EMAIL_PLACE	3/25/2021 - 12:00am	⊡# O	Not Started	Colen Signitu Room
2 Sally Settlement sally.settlement@exampl Settlement Agent	Unassigned,			Ready to Sign	Cren Signing Room
Documents (15) 🚦 🖋 🗋 🖨	<u>a</u>			P	eview 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	t	~
5 Hazard Insurance Authorization and Requirements			2	1	~
-6 Borrower Consent to the Use of Tax Return Information			1	1	~
			1	1	1000



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

Close Console (Settlement Age		🙆 Sally -	
LOAN Loan #: 777-1616630796081 Primary Borrower: Erica Sample Type: EClosing Package ID: 333727 Worksheet #: 1616630796081 (Version: 1)	DER Company: DSI TEST LENDER (SALES) Contact: Michael Morford Ermail: mikem@docmagic.com Phone: (800) 649-1362	COUNTDOWN TO CLOSING	MINUTES SECONDS
E Details			📸 Ready to Close
Signers (2)			
# Signer Name / Email Role Notary Name	/ Email Notary Type / KBA / St Closing Date - Time KBA / St	atu ID Verify / Status Stat	us e Sign
1 Erica Sample erica.sample@example.c Borrower Notary_name_ NOTARY_EMA		O 🕞 O 🔹 Not Start	ed Open Signing Room
2 Sally Settlement sally.settlement@exampl Settlement Agent Unassigned		<ul> <li>Ready to</li> </ul>	Sign Open Signing Room
Documents (15) 📑 🖋 🖻 🖨 🚥		Page(s) Signer(s)	Preview Mode ON
1 Uniform Residential Loan Application		9 1	~
2 MERS California Deed of Trust		16 2	~
3 Specific Closing Instructions		3 2	· · ·
		1 1	~
4 California Hazard Insurance Disclosure			
California Hazard insurance Litsclosure     Hazard Insurance Authorization and Requirements		2 1	$\sim$
		2 1 1 1	<ul> <li></li> <li></li> </ul>



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

Yerkinger Die schosing   Packager Die 3337277   Worksheet #: 16166307760081 (Version: 1)     Yerkinger Die 3337     Pone: (200) 649-1382     Pone: (20	-
Signers (2)       Image: Construct of the second of the seco	ONDS Edit
#       Signer Name / Email       Role       Notary Name / Email       Notary Type / Closing Date - Time       KBA / Statu       Esize       Status       esign         1       Erica Sample erica sample@example.c       Borrower       Notary_name_placeholde       325/2021 - 12:00am       Image: Closing Date - Time       Motary type / Closing Date - Time       Image: Closing Date - Time       Motary type / Closing Date - Time       Image: Clos	llose
1       Erica Sample erica sample@example c sally Settlement sally Settlement example@example       Borrower NOTARY_EMAIL_PLACE Settlement sally Settlement example@example       Not started NOTARY_EMAIL_PLACE Signing F         2       Sally Settlement sally settlement@example       Settlement Agent       Unassigned       Image: Completed of the sally settlement sally settlement Agent       Unassigned       Preview Mode       Preview Mode       Preview Mode         #       eSign Enabled       Page(s)       Signer(s)       Completed         1       Uniform Residential Loan Application       9       1       Image: Completed	
1       erica sample@example.c       Boffower       NOTARY_ENAIL_PLACE       3/25/20/21 - 12/20/am       Image: Comparison of the sample of the	n
2     saty settlement@exampl     Settlement Agent     Unassigned     Ready to Sign     Signing T       Documents (15)     Image: Comparison of the settlement Agent     Image: Comparison of the settlement Agent     Preview Mode     Image: Comparison of the settlement Agent     Image: Comparison of the settlement Agent<	Room
# eSign Enabled     Page(s)     Signer(s)     Completed       1     Uniform Residential Loan Application     9     1	n Room
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 V	
5 Hazard insurance Authorization and Requirements 2 1	
6 Borrower Consent to the Use of Tax Return Information 1 1	
· D¢LL	



At the bottom, "Print and Sign" lists all the documents in the package that require a wet signatures from the borrowers.

A DocMagic eClose Console (Settlement Agent)			🝳 Sally 🗸
1 Uniform Residential Loan Application	9	1	
2 MERS California Deed of Trust	16	2	
3 Specific Closing Instructions	3	2	× .
			~
4 California Hazard Insurance Disclosure	1	1	~
5 Hazard Insurance Authorization and Requirements	2	1	~
6 Borrower Consent to the Use of Tax Return Information	1	1	× 6
7 California Fair Lending Notice	1	1	~
8 California Private Mortgage Insurance Notice	2	1	~
9 Closing Disclosure	5	1	V B
10 IVES Request for Transcript of Tax Return	2	1	< 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	$\sim$
Copyright 2021 DocMagic, Inc ALL RIGHTS RESERVED	Home	Contact Priva	ry Policy Terms of Use
Déli			



#### Adding Documents

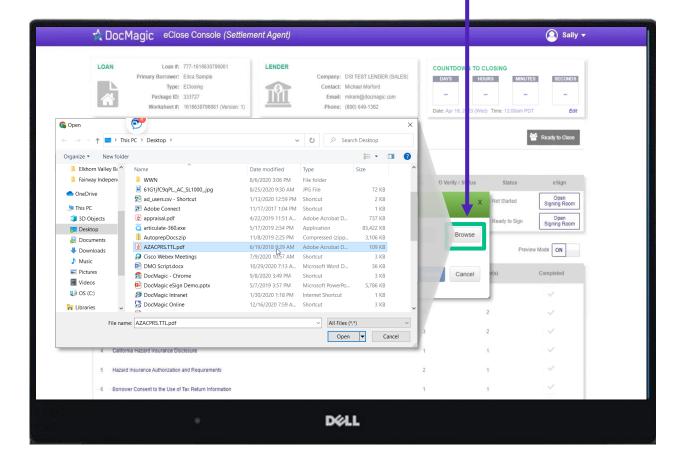
Click on this document button to add settlement documents to the package.

🔧 DocMagic 👒	lose Console (Settlement Agent)			🙆 Sally 🕶
Primary Borr	#:         777-1616630796061           0:         Erica Sample           1:         Eclosing           0:         333727           #:         166830796081 (Version: 1)	Company: DSI TEST LENDER (SALES) Contact: Michael Morford Email: mikem@docmagic.com Phone: (800) 649-1362	COUNTDOWN TO CLOSING DAYS HOURS M Date: Apr 19, 2023 (Wed) Time: 12:00ar	NUTES SECONDS PDT Est
Details	eJournal 🏷 Action Log			📸 Ready to Close
Signers (2)				
# Signer Name / Email	Role Notary Name / Email	Notary Type / KBA / Statu Closing Date - Time	s ID Verify / Status Status	eSign
1 Erica Sample erica.sample@example.c	Notary_name_placeholde NOTARY_EMAIL_PLACE	3/25/2021 - 12:00am	Not Started	Open Signing Room
2 Sally Settlement sally.settlement@exampt	Settlement Agent Unassigned		Ready to Sig	Open Signing Room
Documents (15)	▼ ▶ / D ⊕ O		F	Preview Mode ON
# eSign Enabled		Pa	ge(s) Signer(s)	Completed
1 Uniform Residential Loan	Application		9 1	V
2 MERS California Deed of	Trust		16 2	V
3 Specific Closing Instruction	ons		3 2	~
4 California Hazard Insuran	ice Disclosure		1 1	~
5 Hazard Insurance Authori	zation and Requirements		2 1	~
6 Borrower Consent to the	Use of Tax Return Information		1 1	~
	•	DØLL		



#### Adding Documents

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





#### AutoPrep™

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

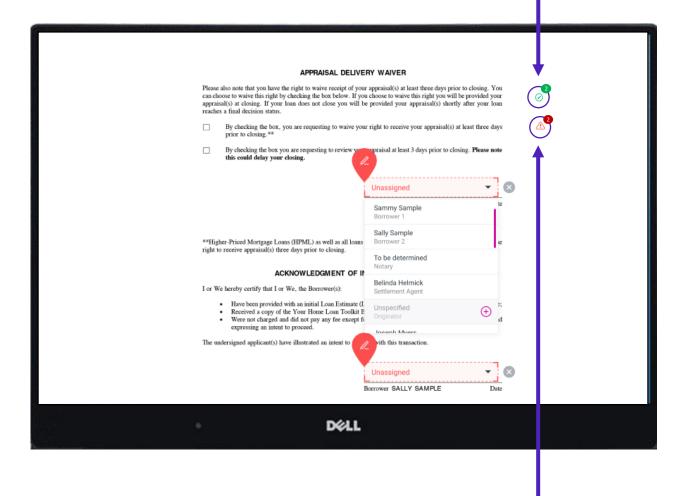
	Your document is ready to be reviewer	d
	Assigned signatures 30     Assigned signatures 11     Requires Validation 9	
Cancel		Next
	DØLL	

AutoPrep<sup>™</sup> uses A.I. and machine learning to prepare documents for signature.



### Creating Signing Boxes via AutoPrep™

## <u>Green</u> means that the signature line has been identified to match a previously entered borrower/signer



Red means that AutoPrep has found a signature line, but not a signer

Red fields *must* be verified before sending the document to proceed with eSign



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

A notary public or other officer completing this certificate verifies the document to which this certificate is attached, and not the truth	
	numess, accuracy, or variatly of that o cument.
State of	
County of	
Subscribed and sworn to (or affirmed) before me on this	day of
by John Smith	- 8
	Why are you deleting this signature mark?
	Not a signature mark
proved to me on the basis of satisfactory evidence to be the person(s	O Not needed for this transaction







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

#### **Uniform Residential Loan Application**

Co-Borrower informat spouse) will be used as will not be used as a t applicable law and Bo ted in a communit	tion must also be pro s a basis for loan qua basis for loan qualif prower resides in a c ty property state as a	dby the applicant(s) with the ovided (and the appropriate bo alification or ☐ the income or fication, but his or her liabilit community property state, the basis for repayment of the lo rower and Co-Borrower each a rower and Co-Borrower each a	ox checked) when the assets of the Borrower's ies must be considered security property is loca	income or assets spouse or other p because the spous	of a person other than erson who has commu- e or other person has ty property state, or th	the Borrower (includ nity property rights pu community property	ing the Borrower's ursuant to state law rights pursuant to
Terry M Mackey	(Borrower 1)			rried Man (B	orrower 2)	<b>.</b>	
Borrower			Co-Bor	ower			
		I. TYPE O	F MORTGAGE AND 1				
Mortgage 🛛 V Applied for: 🗆 F		onal 🗌 Oth ural Housing Service	ner: (explain)	Agency	Case Number	Lender Case Nu 2020030016	mber
Amount \$400,000.00	Interest Rate 3.250%	No. of Months 360	Amortization Type:	Fixed Rate	Other (explain)	c .	
Subject Property Addr 1107 Chesterton Legal Description of S	Drive, Richar	e & ZIP)	'INFORMATION ANI	PURPOSE OF	LOAN		No. of Units 1 Year Built 1978
Purpose of Loan		□ Construction □ Construction-Permanent	$\Box$ Other (explain):		erty will be: rimary Residence 🛛 🗌	Secondary Residence	e 🗌 Investment
		ruction-permanent loan.		1		12 12	22
Year Lot Acquired	Original Cost S	Amount Existing Liens	(a) Present Value of I \$	ot (b) (	Cost of Improvements	Total (a + S	b)
Complete this line if th	his is a refinance loa						
Year Acquired	Original Cost	Amount Existing Liens	Purpose of Refinance	Des	ribe Improvements 🗌	made 🗌 to be made	3
2000	\$240,000.00	\$146,914.00	CASH OUT OTHER	Cost	: \$		
Title will be held in w	hat Name(s)		N	fanner in which T	itle will be held	Estate will	l be held in:

DELL

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



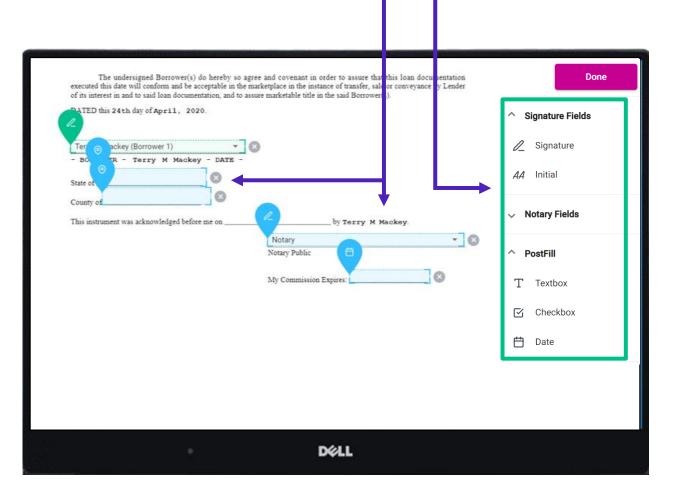
## Clicking the plus opens a toolbox on the right side. You can use these to fill in blank fields.

🛠 DocMagic	Done
2020030016 test.pdf	^ Signature Fields
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). PATED this 24th day of April, 2020.	🖉 Signature AA Initial
Terry M Mackey (Borrower 1)	$\checkmark$ Notary Fields
- BORROWER - Terry M Mackey - DATE - State of County of This instrument was acknowledged before me on by Terry M Mackey. NotaryNotaryNotary Public	<ul> <li><b>PostFill</b></li> <li>T Textbox</li> <li>✓ Checkbox</li> <li>➡ Date</li> </ul>
My Commission Expires:	+
⊳ <b>D%LL</b>	



#### AutoPrep™

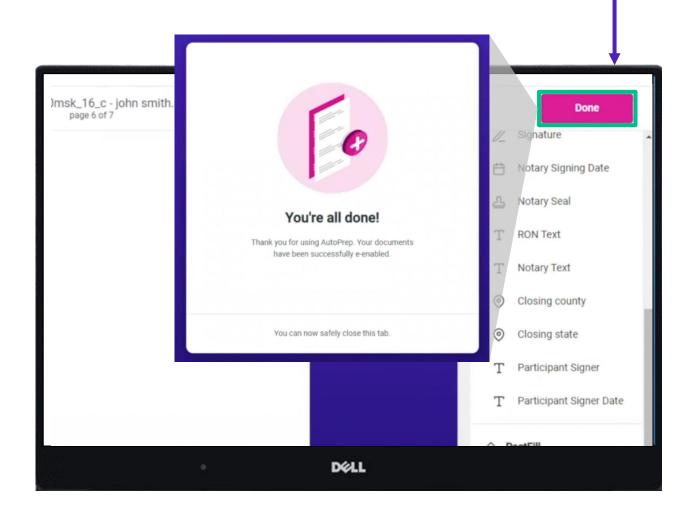
It is crucial that you assign fields correctly and fix wrongly identified fields every time so the system can learn from your edits.





### 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.

Close Console (Settlement Agent)			🙆 Sally 🗸
LOAN Loan #: 777-1616630796081 Primary Borrower: Erica Sample Type: EClosing Package ID: 333727 Worksheet #: 1616630796081 (Version: 1)	Company: DSI TEST LENDER (SALES) Contact: Michael Morford Email: mikem@docmagic.com Phone: (800) 649-1362	COUNTDOWN TO CLOSING	MINUTES SECONDS
E eJournal O Action Log			📸 Ready to Close
Signers (2)			
# Signer Name / Email Role Notary Name / Email	Notary Type / KBA / Status Closing Date - Time	ID Verify / Status Statu	us e Sign
Erica Sample     erica sample@example.c     Borrower     Notary_name_placeholde     NOTARY_EMAIL_PLACE	3/25/2021 - 12:00am	🕞 🔘 🔹 Not Starte	ed Open Signing Room
2 Sally Settlement sally.settlement@exampl Settlement Agent Unassigned		Ready to	Sign Open Signing Room
Documents (15) 📑 🖋 🔁 🖨 🏠	Pag	e(s) Signer(s)	Preview Mode ON Completed
1 Uniform Residential Loan Application	1	9 1	$\sim$
2 MERS California Deed of Trust	1	6 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	$\sim$

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 <u>here</u> for the Document Editor guide.* 

	NAME AND ADDRESS OF							
🐔 Do	CMagic eClos	Console (Settle	ment Agent)					🙆 Doc 🤻
	Primary Borrower: John Sm Type: EClosing Package ID: 417559 Worksheet #: 1638481 Details	19	Company: SAMPLE SON Contact: Michael Morio Email: mikem@docm Phone: (555) 555-555	rd agic	IT AGENT Company: Settlerm Contact: Sally Se Email: struiti@ Phone: (987) 55	ent Closing ttlement docmagic.c	COUNTDOWN TO CLOSING DAYS HOURS 	MNUTES SECONDS      Eat * Start eClosing
Signe	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
	John Smith		Doc Magic	Closing Date - Time DocMagic RON				Cost
2 0	truitt@docmagic.com Diver Originator	Borrower Originator	ron-test@docmagic.com	11/9/2021 - 12:00am	0	0	<ul> <li>Not Started</li> <li>Ready to Sign</li> </ul>	Signing Room
01 3 Si	vliver.originator@mailinat Saily Settlement struitt@docmagic.com	Settlement Agent					<ul> <li>Ready to Sign</li> </ul>	Signing Room Open Signing Room
	ments (6) 🚦 d	/ <b>] -) 4</b>		Paget	1)	Signer(s)	Previ	ew Mode OFF
		anderstand, acknowledge, and agree that t formation for purposes of: (i) providing an offer; (ii) esignitating, maintaining, mana (iii) as otherwise permitted by appli- (iv) marketing to Lender includes the Lender's affiliates al assigns.	TO THE USE OF TAX RETURN INF the Leader and Other Lean Participant can address the Leader and Other Lean Participant can address the leader of the Leader address of the Leader of the Leader the Leader of the Leader of the Leader of the Leader of the Leader test of the New York address and any of addresses test of the New York address and any of addresses test of the New York address and any of addresses test of the New York address and any of addresses test of the New York address and any of addresses test of the New York address and any of addresses test of the New York address and any of addresses test of the New York address addresses test of the New York addresses Data Bostower	n, use and share tax return nd securitizing a loan; or and data security laws ; or tioned parties' successors		1  C C C C C C C C C C C C C C C C C C C		



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

🛧 DocMagic 🧧 eC	lose Console (Settlerr	ant Agent)		🔘 Sally 🗸
Primary Borrow Typ Package I	#: 777-1616630796081 #: Erica Sample #: EClosing D: 333727 #: 1616630796081 (Version: 1)		Company: DSI TEST LENDER (SALES) Contact: Michael Morford Email: mikem@docmagic.com Phone: (800) 649-1362 COUNTDOWN TO CLOS	MINUTES SECONDS
Details	eJournal 🔊 Ad	tion Log		
Date & Time (PST)	User Name	IP Address	Description	
3/24/21 5:06 PM	System User		eSign event created	
3/24/21 5:06 PM	Erica Sample		Invitation sent to erica.sample@example.com	
3/24/21 5:06 PM	Sally Settlement		Invitation sent to sally.settlement@example.com	
3/24/21 5:11 PM	System User		Date: 2021-03-24 17:11:04 InkSign Fax received for document: 3596363 ()	
3/24/21 5:11 PM	Erica Sample		Multistate Fixed Rate Note signed by Erica Sample	
3/24/21 5:12 PM	Sally Settlement	172.16.1.98	Document AZACPRS.TTL pdf added to package	
				Add Internal Note To Action Log
		1		
			DØLL	
	You may	also a	add notes at the bottom.	1



### Print Options

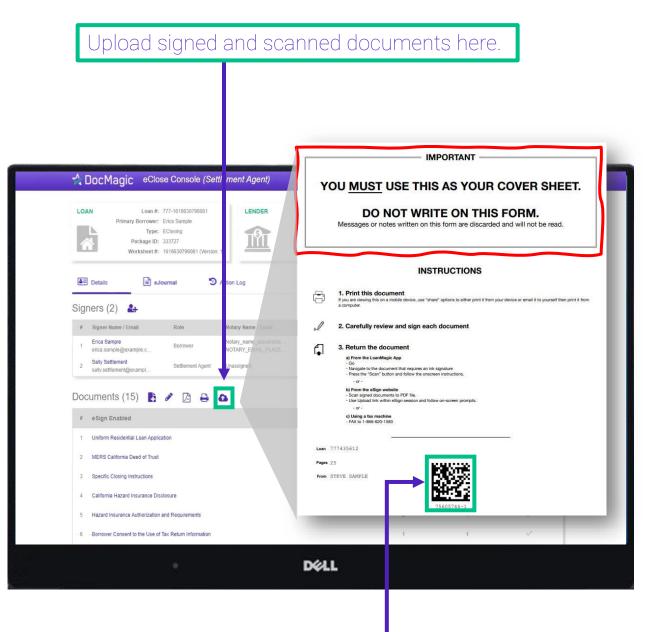
## Printer Icon allows you to download documents that require wet signatures.

LOAN Loan #: 777-16166307960 Primary Borrower: Erica Sample Type: Eclosing Package ID: 333727 Worksheet #: 1616630796081 (0	Co E	pany: DSITEST LENDER (SALES) ntaci: Michael Morford smalt: mikem@docmagic.com hone: (800) 649-1362	COUNTDOWN TO CLOSING	-
E Details	Ction Log			📸 Ready to Close
Signers (2)				
# Signer Name / Email Role	Notary Name / Email	Notary Type / KBA / Status Closing Date - Time	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 Ag	nt Unassigned		Ready to Sign	Open Signing Room
Documents (15) 🖹 🖋 🖸 🖨	•	Page(		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	n	1	1	~
		XXLL		

documents – not always necessary, just an option



#### Wet-sign Options



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



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

DocMagic eClose Console (Settlement Agent)			🙆 Sally 🗸
1 Uniform Residential Loan Application	9	1	
2 MERS California Deed of Trust	16	2	~
3 Specific Closing Instructions	3	2	~
4 California Hazard Insurance Disclosure	1	1	~
5 Hazard Insurance Authorization and Requirements	2	1	~
6 Borrower Consent to the Use of Tax Return Information	1	1	· · · · · · · · · · · · · · · · · · ·
7 California Fair Lending Notice	1	1	~
8 California Private Mortgage Insurance Notice	2	1	~
9 Closing Disclosure	5	1	~
10 IVES Request for Transcript of Tax Return	2	1	~
11 Initial Amortization Schedule	8	0	<b>~</b>
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	×
9 Copyright 2021 DocMagic, Inc ALL RIGHTS RESERVED	Home	Contact Privac	y Policy Terms of Use
Dél	1		



#### Ready to Close

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

Crosing Date - Time	LES) DAYS		ECONDS - Edit Ready to Close e Sign Signing Room Open Signing Room
Signers (2)       And the second		tus Status Not Started	eSign Open Signing Room Open
#         Signer Name / Email         Role         Notary Name / Email         Notary Type / Closing Date - Time         K           1         Erica Sample erica: cample@example.c         Borrower         Notary_name_placeholde NOTARY_EMAIL_PLACE         3/25/2021 - 12:00am           2         Sally Settlement         Softlement facet         Locationand		Not Started	Open Signing Room
Erica Sample         Borrower         Notary_name_placeholde         3/25/2021 - 12:00am           sally Settlement         Settlement         Settlement         Settlement         Settlement		Not Started	Open Signing Room
erica.sample@example.c     Borrower NOTARY_EMAIL_PLACE     3/25/2021 - 12:00am     Sally Settlement Settlement Lipscipped	₩°0 () () () () () () () () () () () () ()		Signing Room Open
		Ready to Sign	Open Signing Room
Documents (16) 🖹 🖋 🖪 🖨		Preview	Mode off
# eSign Enabled	Page(s)	Signer(s)	Completed
1 Uniform Residential Loan Application	9	1	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	~
Déll			

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.

43





### 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.

D docs@ ocmagic.com To Alan Dai	🙂 🕤 Reply 🍕	→ Reply All → Forward Mon 3/18	<b>1</b>	
Start your reply all v th: Completed. Signed. That	nks! I signed it. (i) Feedback		,	
John Smith,				
Your closing documents are ready to be electron documents.	onically signed! Please click the link l	pelow to electronically sign ye	our closing	
<u>Click here to sign</u>				
Please be advised that some documents conta notary. If your closing package contains any of				
scheduled closing appointment.	these documents, they will be clean	y marked and signed at your		
Have a great closing!				
DSI TEST LENDER (SALES)				
	, , , , , , , , , , , , , , , , , , ,			



### Logging In - Verification

Verification boxes include SSN and viewing code. The lender may add property zip code as a third option.

	Comparison     C



#### Preparing Your Documents

You may see a "Preparing your documents" loading screen when you enter the signing experience.

🛠 DocMagic	💿 Review 🔵 Sign 🥐 Completed		JS JOHN SMITH Customer	~
Please review your documents. Bor	Closing Documents ower's Certification, Authorization and Consent		Start sign	ing
BORROWER'S CERTIFICATION, A Lown Number: 777032520240003 Date: December 21, 2023 Provided By: DSI TEST LENDER (SALES)		ē	All documents   Borrower's Certification, Authorization and  Multistate Fixed Rate Note New Jersey Mortgage (MERS) New Jersey Addendum to Residential Mort	2 2 1
Borrower: JOHN SMITH Property Address: 935 WILLOW STREET, FRISCO. Preparing yo The undersigned certify the following:	New Jersey 75034		Uniform Residential Loan Application Addendum to Closing Instructions Specific Closing Instructions Hazard Insurance Authorization and Requir IVES Request for Transcript of Tax Return	
			Closing Disclosure Customer Identification Verification Hardship Letter Initial Escrow Account Disclosure Statement	
Section 1014. AUTHORIZATION TO REL As part of our mortgage loan application process, Lender contained in my/our loan application and in other documents		+	New Jersey Initial Tax Authorization Notice New Jersey Private Well Testing Act Certif Signature Affidavit and AKA Statement	

The system will automatically take you to the first document that needs to be signed.



#### Page Features

### Along the top, you will find indicators that show progress of the Review, and e-Sign processes.

	documents.	Bor		Documents Authorization and Cons	ent	Start sig	gning
	BORROWER CONSE	INT TO THE U	SE OF TAX RETURN	INFORMATION	a Î	All documents 👻	6
	tand, acknowledge, and agree t tion for purposes of:	hat the Lender and	Other Loan Participants can o	obtain, use and share tax return	-	Borrower's Certification, Authorization a	e
(i) (ii)	providing an offer;	anaging monitorin	a canviaina callina incurir	ng, and securitizing a loan; or		Multistate Fixed Rate Note	
(iii) (iii) (iv)	as otherwise permitted by a			acy and data security laws.; or		New Jersey Mortgage (MERS)	0
	nder includes the Lender's affili	ates, agents, servio	e providers and any of afore	mentioned parties' successors		New Jersey Addendum to Residential M	
and assi						Uniform Residential Loan Application	
or acqui	er Loan Participants includes a irers of any beneficial or other	nterest in the loan,	any mortgage insurer, guara	antor, any servicers or service		Addendum to Closing Instructions	
provide	rs for these parties and any of a	torementioned pa	rties successors and assigns	5.		Specific Closing Instructions	
		n				Hazard Insurance Authorization and Req	
L.	Signature					IVES Request for Transcript of Tax Return	
Borrow	er JOHN SMITH	Date	Borrower	Date		Closing Disclosure	
						Customer Identification Verification	
						Hardship Letter	
						Initial Escrow Account Disclosure State	
					+	Initial Escrow Account Disclosure State	

By default, all documents that need to be signed are listed in this column on the right. You can filter this column by documents that need to be ink signed or notarized from the dropdown at the top.



#### Page Features

The print icon allows you to print the documents.

lease review your documents.	Bor	Closir rower's Certificatio	ng Documents n, Authorization and	d Consent	Start	signing
BORROWER CONS	ENT TO THE U	SE OF TAX RETUR	N INFORMATION		All documents	E
I understand, acknowledge, and agree information for purposes of:	that the Lender and C	Other Loan Participants ca	n obtain, use and share tax	a return	Borrower's Certification, Authorization a	Î a
<ul> <li>(i) providing an offer;</li> <li>(ii) originating, maintaining, i</li> <li>(iii) as otherwise permitted by</li> <li>(iv) marketing</li> </ul>					Multistate Fixed Rate Note New Jersey Mortgage (MERS)	G
The Lender includes the Lender's affi and assigns.	liates, agents, servic	e providers and any of af	orementioned parties' suc	cessors	New Jersey Addendum to Residential M Uniform Residential Loan Application	
The Other Loan Participants includes or acquirers of any beneficial or other providers for these parties and any of	interest in the loan,	any mortgage insurer, gu	arantor, any servicers or		Addendum to Closing Instructions	
					Specific Closing Instructions Hazard Insurance Authorization and Req	
Signature Borrower JOHN SMITH	Date	Borrower		Date	IVES Request for Transcript of Tax Return	
					Closing Disclosure	
				13	Customer Identification Verification	
				→ 🚺	Hardship Letter	
				+ -	Initial Escrow Account Disclosure State New Jersey Initial Tax Authorization Noti	

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.

ease review your documents. Borrower's Cert	Closing Documents ification, Authorization and Consent	_	My Documents	
<ul> <li>BORROWER CONSENT TO THE USE OF TAX</li> <li>Iunderstand, acknowledge, and agree that the Lender and Other Loan Parti information for purposes of:         <ol> <li>providing an offer;</li> <li>originating, maintaining, managing, monitoring, servicing, see</li> <li>as otherwise permitted by applicable laws, including state and</li> <li>marketing</li> </ol> </li> <li>The Lender includes the Lender's affiliates, agents, service providers and and assigns.</li> <li>The Other Loan Participants includes any actual or potential owners of a l or acquiters of any beneficial or other interest in the Ioan, any mortgage in providers for these parties and any of aforementioned parties' successory</li> </ul>	cipants can obtain, use and share tax return lling, insuring, and securitizing a loan; or federal privacy and data security laws.; or any of aforementioned parties' successors loan resulting from your loan application, nsurer, guarantor, any servicers or service	Addendum Specific Cl Hazard Ins	Change Email Address Withdraw Consent Terms of Use Save & Exit esidential Loan Application In to Closing Instructions losing Instructions surance Authorization and Req	
Signature Borrower JOHN SMITH Date Borrower	Date 13	Closing Di Customer Hardship L Initial Escr	Identification Verification	



### Document Information

& DocMagic	Review Sign Completed		19	CUSTORIER	/
lease review your documents. Born	Closing Documents rower's Certification, Authorization and Conse	ent		Start signing	
I understand, acknowledge, and agree that the Lender and C information for purposes of: (i) providing an offer; (ii) originating, maintaining, managing, monitorin	g, servicing, selling, insuring, and securitizing a loan; or uding state and federal privacy and data security laws.; or e providers and any of aforementioned parties' successors al owners of a loan resulting from your loan application, any mortgage insurer, guarantor, any servicers or service	•	Closing Documents Version 1 · ID: 1158504 Loan Number 777032520240003 Package Details 16 documents · 55 total pages Dates ent March 25, 2024 Expiration Date N/A Sent by Steve Truitt struitt@docmagic.com DSI TEST LENDER (SALES)		
Signature Borrower JOHN SMITH Date	Borrower Date	(1) (+) (-)			

Click the information icon to see document package metadata.



### Participants

🛠 DocMagic	Review     S	ign 🥐 Completed		JS JOHN Custor	SMITH mer
Please review your documents.	Closing Doc Borrower's Certification, Au			St	art signing
I understand, acknowledge, and agree the information for purposes of: (i) providing an offer; (ii) originating, maintaining, mai (iii) as otherwise permitted by ap (iv) marketing The Lender includes the Lender's affilia and assigns. The Other Loan Participants includes an or acquirers of any beneficial or other in	AT TO THE USE OF TAX RETURN INF the Lender and Other Loan Participants can obta haging, monitoring, servicing, selling, insuring, i blicable laws, including state and federal privacy es, agents, service providers and any of aforement y actual or potential owners of a loan resulting fr terest in the loan, any mortgage insurer, guaranto rementioned parties' successors and assigns.	in, use and share tax return and securitizing a loan; or and data security laws.; or ntioned parties' successors om your loan application,	JS J BO B	ipants IonN SMITH Iand@docmagic.com Zustomer Ivron ODEN Iand@docmagic.com Jettlement Agent	
Signature Borrower JOHN SMITH	Date Borrower	Date [:			

Click here to view participants.



#### Return to Documents List

## This button brings you back to the list of Documents (selected by default).

A DocMagic	( Rev	riew 🔵 Sign 🥐 Completed		JOHN SMITH Customer	~
Please review your documents.		Closing Documents cation, Authorization and Consent		Start sign	ing
	SENT TO THE USE OF TAX RE		All documents Borrower's Certif	ication, Authorization a	<b>a</b>
	managing, monitoring, servicing, selling applicable laws, including state and fed	g, insuring, and securitizing a loan; or leral privacy and data security laws.; or	Multistate Fixed		<u>د</u>
and assigns. The Other Loan Participants includes or acquirers of any beneficial or othe	iliates, agents, service providers and any any actual or potential owners of a loar r interest in the loan, any mortgage insur f aforementioned parties' successors an	n resulting from your loan application, rer, guarantor, any servicers or service	Uniform Residen	tial Loan Application bsing Instructions	
Signature Borrower JOHN SMITH	Date Borrower	Date		e Authorization and Req Transcript of Tax Return re	
			Customer Identif Hardship Letter	ication Verification	
		(+		count Disclosure State	



#### Start Signing

## Click "Start Signing" to begin the signing process.

Please review your documents.	Initial Disclosure Borrower's Certification, Authorization and Conse	ent	Start sign	ing
		a Î	Borrower's Certification, Authorization and	
BORROWER CONSENT TO THE	USE OF TAX RETURN INFORMATION		Addendum to Loan Application	
	nd Other Loan Participants can obtain, use and share tax return		California Domestic Partnership Addendu	õ
information for purposes of:			Uniform Residential Loan Application	(j)
	oring, servicing, selling, insuring, and securitizing a loan; or		IVES Request for Transcript of Tax Return	
<ul><li>(iii) as otherwise permitted by applicable laws,</li><li>(iv) marketing</li></ul>	including state and federal privacy and data security laws.; or		Authorization for the Social Security Admi	
The Lender includes the Lender's affiliates, agents, se and assigns.	rvice providers and any of aforementioned parties' successors		California Acknowledgment of Receipt of L	
	tential owners of a loan resulting from your loan application,		California Copies of Signed Documents	
	an, any mortgage insurer, guarantor, any servicers or service		California Fair Lending Notice	
			California Hazard Insurance Disclosure	
			Housing Counselors Near You	
Signature				
Borrower JOHN SMITH Date	Borrower Date		Important Information About Procedures f	
T			Iowa Subordination Agreement	
			Lender Record Change	
			Loan Estimate	

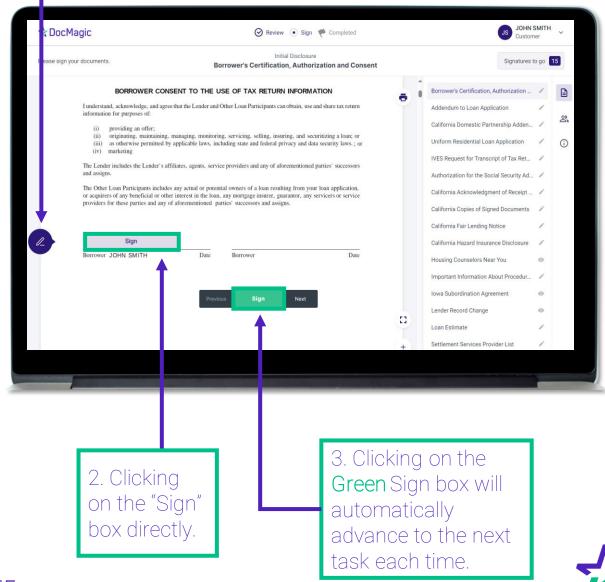
You can't sign anything until you hit the purple button in the top right corner – until then, these will remain greyed out and unsingable.



#### Begin Click-Signing

#### There are three options for click-signing.

#### 1. Clicking the pen icon.



#### You have the option to choose the preformed signatures available in this tab.

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Please sign y	our documents.		Initial Disclosure			Signatures t	o go 🛛 15	
		Select Your Signature			×			-
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	and assigns.	O John Smith	JS			he Social Security Ad ledgment of Receipt		
	or acquirers of providers for t	0 John Smith	gS			of Signed Documents		
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0_	Borrower JO	O John Smith	JS			Insurance Disclosure ors Near You	0	
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		By checking this box, I ratify the use above as an electronic representation		Cancel	Select	n Agreement	•	
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				+	Settlement Serv	ices Provider List	1	



You can also create a signature and initials using this tab.

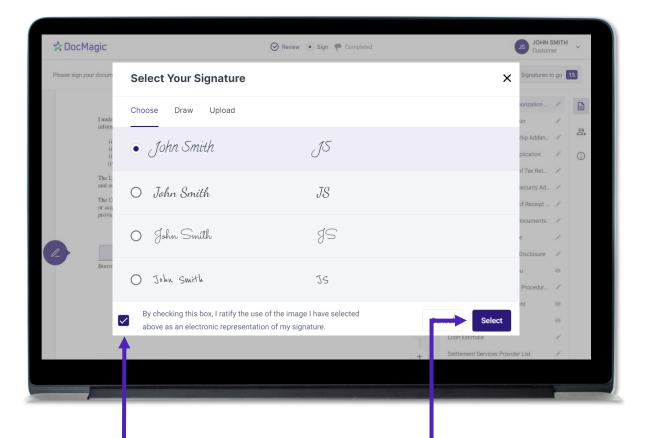
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		Select Yo	ır Signature			× n, Authorization	. /	
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Regardless of what option is chosen, you must check the box authorizing the use of an electronic signature and then hit Select.



#### Check Boxes Required

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

sign y	our documents.		IVE	Initia S Request for	al Disclosure <b>Transcript</b>	of Tax Return				Signatures t	to go 🥤	10
	TEST LENDER (SALES)					(800) 649-136	52	-				
	t address (including apt., room, or suite no W. 213TH STREET	J.		RANCE		vi. ZIP code 90501		-	Borrower's Certification, Auth	orization	~	
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104	•								California Domestic Partners	hip Adde	<ul> <li></li> </ul>	<b>_</b>
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### Keeping Track of Your Progress

# The countdown feature shows how many signatures remain.

Please sign your documents.	Initial Disclosure	Source Vour CCN Varifie	Signatures to go 9
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### Keeping Track of Your Progress

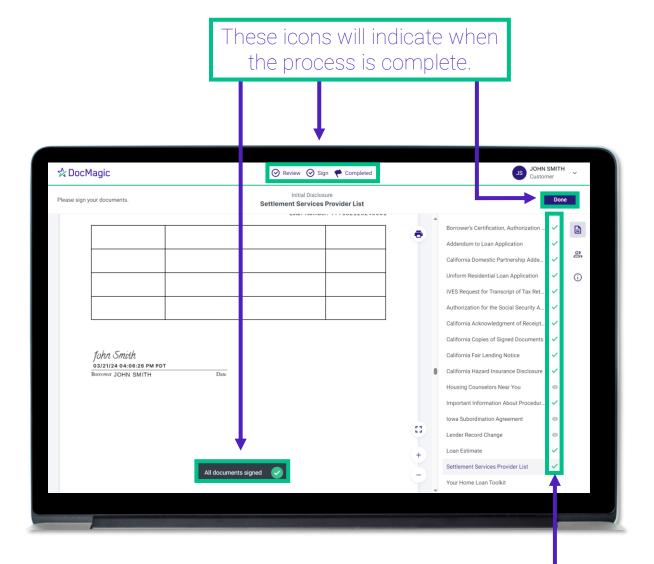
### You can also check the signed status of each document via these **green** check marks.

Please sign your documents.	Closing Documents Acknowledgment of Receipt of Appraisal Report		Signatures	90 11
	ACKNOWLEDGMENT OF RECEIPT OF APPRAISAL REPORT	•	All documents	
	Loss Number: 1025202100001		alifornia Domestic Partnership Ad.,	8
	Date: OCTOBER 25, 2021	U	niform Residential Loan Application	0
	Leader: DSI TEST LENDER (ALAN DAI)	G	eneral Closing Instructions	0
	Borrower: MICHAEL SAMPLE	N	ultistate Fixed Rate Note	7
		c	alifornia Deed of Trust	
	Property Address: 123 MAIN ST TORRANCE, CALIFORNIA 90501	s	secific Closing Instructions	
	Under federal law, the creditor is required to provide you a copy of all appraisals or other written valuations	В	orrower's Certification and Author	
	developed in connection with your application for credit that is to be secured by a first lien on a dwelling. The creditor is required to provide a copy of each such appraisal or written valuation, at no additional cost to you,	c	ertificate of Loans to One Borrowe	
	promptly upon completion, or three business days prior to consummation, whichever is earlier.	н	azard Insurance Authorization and	
	By signing below, your signature will acknowledge either:		ES Request for Transcript of Tax .	
	<ul> <li>Your receipt of the appraisals or other written valuations developed in connection with your loan, no later than three days prior to consummation, or</li> <li>You previously waived your right to review the appraisal or other written valuation three days prior to</li> </ul>		9 - Payers Request for Taxpayer IC	
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#### When Complete

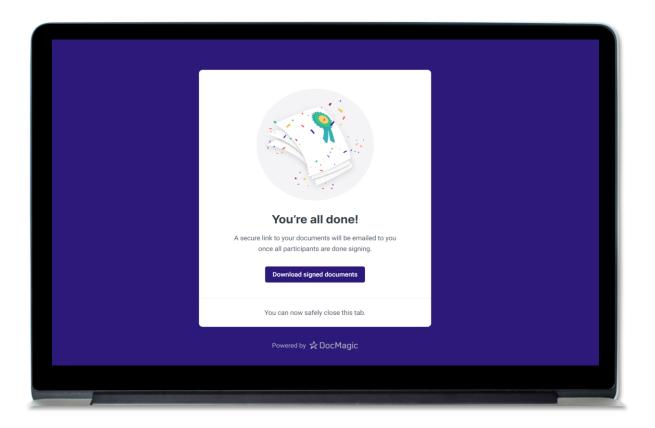


All applicable checkmarks will be green.



### 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.

Primary Name: Type: Package Id:	EClosing 558436 2704 (Versio			Lender:		LENDER	(SALES) (100 m	SALES)		ocuments: Signers: Expires:	Signed (Active) 17 (66 total pages) 3 N/A (Requires: Prim Y (Ink Sign)	ary)		
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The lender will also be able to download a PDF (PDF icon) and/or print (printer icon) the signed document stack.





#### Back to the Settlement Agent Portal

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

Primary Borrower: Erica S Type: EClosir Package ID: 333727 Worksheet #: 161663	ng 7		Company: DSI TEST LENDE Contact: Michael Morford Email: mikem@docmagi Phone: (800) 649-1362		COUNTDOWN TO DAYS Date: Apr 19, 2023 (V	HOURS IN	UTES SECONDS  PDT Edit
El Details eJourn	nal 🧿 Ac	tion Log					😤 Ready to Close
# Signer Name / Email Ro	ole N	otary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1 Erica Sample erica.sample@example.c Bo		otary_name_placeholde OTARY_EMAIL_PLACE	3/25/2021 - 12:00am	<b>⊡</b> * O	0	Finished	Open Signing Room
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When all signed documents have been uploaded and all signatures and fields are completed, the Settlement Agent will see a fully completed column on the right.

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	9 9		
1 Uniform Residential Loan Application		1	~
2 MERS California Deed of Trust	16	2	~
3 Specific Closing Instructions	3	2	× 1
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	4	~
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	¥
# Print and Sign	Page(s)	Signer(s)	Completed



#### Email Confirmation

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

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Kimberly,				
Thank you for completing the electronic signing process.				
We recommend that you save this email for future reference and for instant access to your	<sup>r</sup> documents in the future.			
You may access your electronically signed documents at any time. Click here to access you	our documents now			
If you have questions about this process, <u>click here</u> to visit our online support system.				
This message and any attachments contain information which may be confidential and privileged. Unless ye not use, copy or disclose to anyone any information contained in this message or in any attachments. If you this message and any attachments. <i>Please consider the environment before printing this email.</i>				
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The email will allow the Borrower to download their signed and notarized document package from a provided link.

