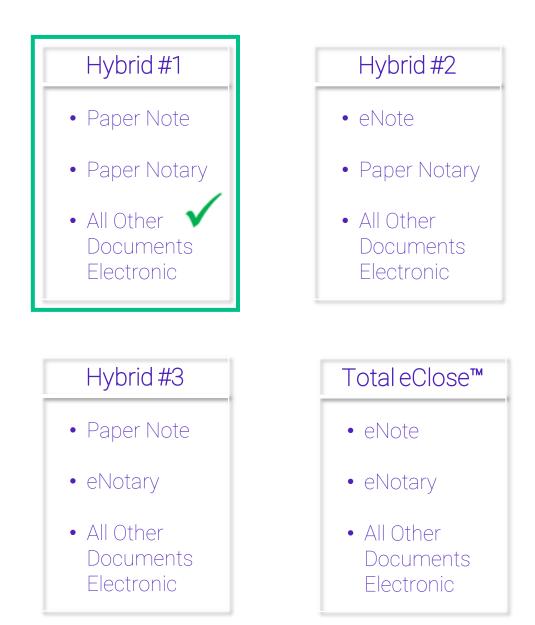


GUIDEBOOK

Hybrid 1 eClose





Hybrid 1 eClose Process

Pro	ocessing Closing Documents in Your LOS	4
	Selecting DocMagic eSign for Hybrid 1 Sending Closing Documents	
Lei	nder Portal	10
\checkmark	Monitor Activity Reminder Emails Documents Tab	
Do	cMagic Settlement Agent Portal	14
✓	eClose Console Tabs o Details o eJournal o Action Log AutoPrep [™] Wetsign with QR Code	
Во	rrower Experience	36
	Portal sign-in / Features Signing Experience	
Fir	nal Actions & Confirmation	58





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 Confine Receipt Costing Disclosure Ver Loan Information 172.000 Ibernerst Rate 4375 w/ MP, 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 Stevice Providers HJD-1A Stellement Statement HJD-1A Stellement Statement Trah-bit Landigo Trah-bit Landigo HJD Land Committee Combined Transmittel Combined Combined Combined Transmittel Combined C	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

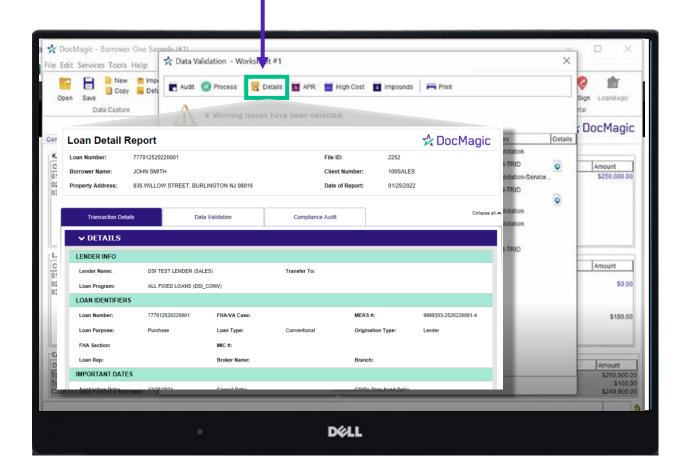
If using DocMagic Online, choose Closing from the Loan Stage here.

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

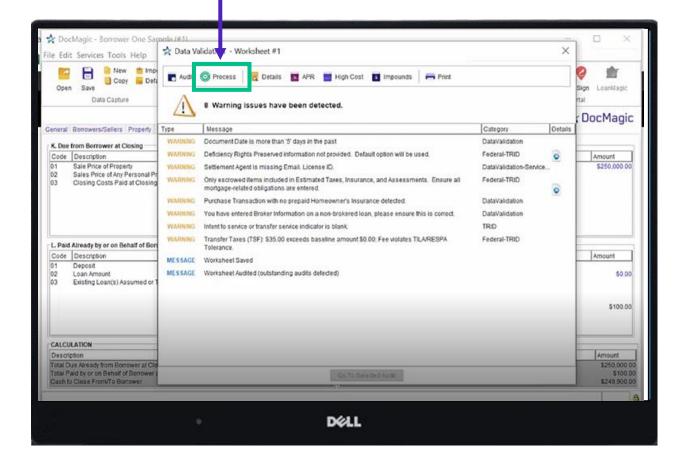
Optional: Click here to see the Loan Detail Report before you process.





Processing Documents – Hybrid 1

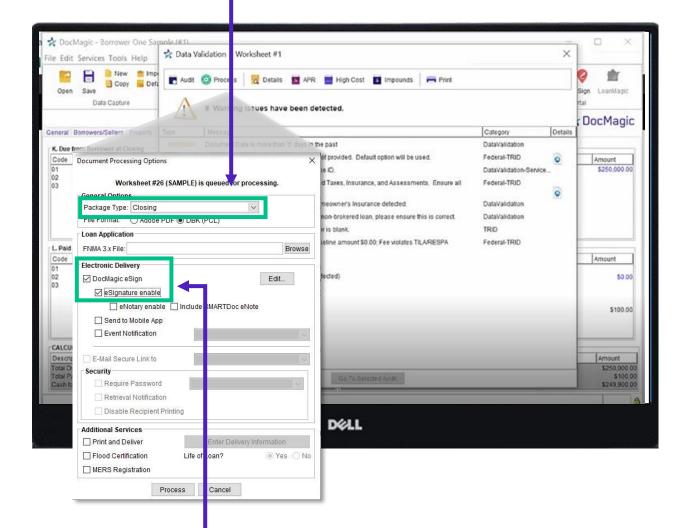
Process the Document set.





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								🕒 🟩 🚔 🎓 🔒 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			scription 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/	tion Log • 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	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	~	7	1	1		5175541 5187042	urla.msc.xml		
5 Uniform F	esidential Loan Application - Lender Loan Information	~	2	0	0	v	5175542 5187043	urlalli.msc.xml		
6 Addendur	n to Closing Instructions	~	1	1	1		5175543 5187044	atci3.msc.xml		
7 Specific C	losing Instructions	~	3	4	2		5175544 5187045	sci.msc.xml		
8 Hazard In	surance Authorization and Requirements	~	2	1	1		5175545 5187046	hazard8.lsr.xml		
9 IVES Rec	uest for Transcript of Tax Return	 Image: A second s	2	2	1		5175546 5187047	4506c.msc.xml		
10 Closing D	isclosure	~	5	1	1		5175547 5187048	cd.dsc.xml		
11 Customer	Identification Verification	~	2	0	0	v	5175548 5187049	civ.msc.xml		
12 Initial Esc	row Account Disclosure Statement	~	2	1	1		5175549 5187050	ieads.msc.xml		
13 New Jers	ey Initial Tax Authorization Notice	~	1	0	0	v	5175550 5187051	njitan.msc.xml		
14 New Jers	ey Private Well Testing Act Certification	~	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	4 L					

You can check the status of the signature process here.

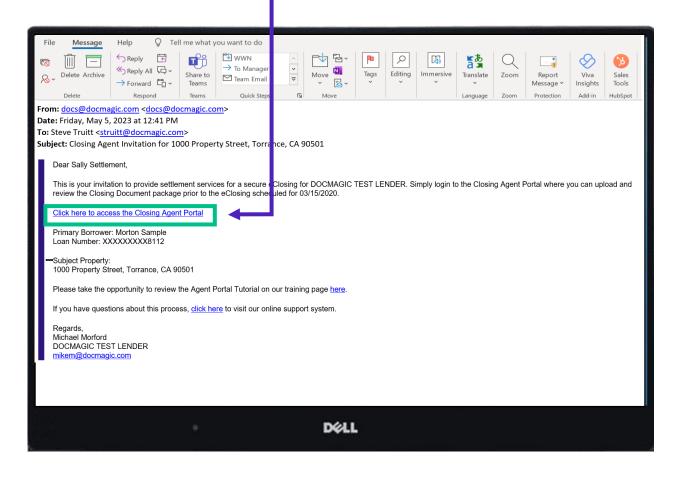




Settlement Agent Invitation Email

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	~
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.

A Doc lagic eClose Console (Settlemen	t 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	MINUTES SECONDS
E Details eJournal 🥲 Action Lo	00		Ready to Close
Signers (2)			
# Signer Name / Email Role Notary	Name / Email Notary Type / KBA / S Closing Date - Time	itatus ID Verify / Status Status	e Sign
	name_placeholde 3/25/2021 - 12:00am	O 🗗 O Not Starter	Open Signing Room
2 Sally Settlement sally.settlement@exampl Settlement Agent Unassig	pned	Ready to S	ign Open Signing Room
Documents (15) 📑 🖋 🕒 🖨			Preview Mode ON
# eSign Enabled		Page(s) Signer(s)	Completed
1. Uniform Residential Loan Application		9 1	V
2 MERS California Deed of Trust		16 2	~
3 Specific Closing Instructions		3 2	\checkmark
3 Specific Closing Instructions 4 California Hazard Insurance Disclosure		3 2 1 1	
4 California Hazard Insurance Disclosure		1 1	~
4 California Hazard Insurance Disclosure 5 Hazard Insurance Authorization and Requirements		1 1	~
4 California Hazard Insurance Disclosure 5 Hazard Insurance Authorization and Requirements	D¢LL	1 1	~



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.

statement of the second state			-	
Close Consol	e (Settlement Agent)			🙆 Sally -
LOAN Loan #: 777-16165307 Primary Borrows: Erica Sample Type: Ecicasian F ckage ID: 33377 W ksheet #: 161683	Add Participant Add the participant's information below:		-	MNUTES SECONDS
E Details	First Name:			Ready to Close
Signers (2)	Email:	Ver	ify / Status atu	is e Sign
Erica Sample erica sample@example.c Sally Settlement sally settlement@exampl Settlement	Phone Number: ()		Not Serte	d Open Signing Room
# eSign Enabled	Role: Select Role Cancel Add	0	Signer(s)	Preview Mode ON
1 Uniform Residential Loan Application	•	9	1	V
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 Requireme	nts	2	1	~
-6 Borrower Consent to the Use of Tax Return Info	mation	1	1	×
	Dell			

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		IUTES 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 V	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	Chen Signit Room
2 Sally Settlement sally.settlement@exampl Settlement Agent	Unassigned,			Ready to Sign	Gren Signing Room
Documents (15) 🚦 🖋 🗋 🖨	۵			Р	review 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		



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	gent)				Sally Sally
LOAN Loan #: 777-1616630796081 Primary Borrower: Erica Sample Type: EClosing Package ID: 333727 Worksheet #: 1616630796081 (Version: 1)	Company: DSI TEST LEND Contact: Michael Morford Email: mikem@docma; Phone: (800) 649-1362		-	CLOSING DURS MINUTES 	SECONDS - Edit
E Details de Journal O Action Log				1	Ready to Close
Signers (2)					
# Signer Name / Email Role Notary Name	ne / Email Notary Type / Closing Date - Time	KBA / Statu	ID Verify / Status	Status	eSign
	1e_placeholde 3/25/2021 - 12:00am	5 1	0	Not Started	Open Signing Room
2 Sally Settlement sally settlement@exampl Settlement Agent Unassigned			_	Ready to Sign	Open Signing Room
Documents (15) 👫 🖋 🗋 🖨 🚳		Page	e(s) Si	Previev gner(s)	Completed
1 Uniform Residential Loan Application		g		1	
2 MERS California Deed of Trust		10	6	2	~
3 Specific Closing Instructions		3		2	14
4 California Hazard Insurance Disclosure		1		1	~
		2		1	\sim
5 Hazard Insurance Authorization and Requirements					
Hazard insurance Authonization and Requirements Borrower Consent to the Use of Tax Return Information		1		1	



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

CocMagic 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 Contact: Michael Morford Email: mikem@doc.magic. Phone: (800) 649-1382		COUNTDOWN TO CLOSING	-
E Details			📸 Ready to Close
Signers (2)			
# Signer Name / Email Role Notary Name / Email Notary Type / Closing Date - Time	KBA / Stati	ID Verify / Status Status	eSign
Erica Sample Notary_name_placeholde 3/25/2021 - 12:00am 1 erica sample@example.c NOTARY_EMAIL_PLACE 3/25/2021 - 12:00am	⊡# O	Not Started	Open Signing Room
2 Sally Settlement sally settlement@exampl Settlement Agent Unassigned		Ready to Sign	Open Signing Room
Documents (15) 📑 🖋 🖻 🖨 🗛	Pag	Prev re(s) Signer(s)	view Mode ON
1 Uniform Residential Loan Application		9 1	17
2 MERS California Deed of Trust	d	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	~
Déll			



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
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Adding Documents

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

🔧 DocMagic 🤘	lose Console (Settlement Agent)			🙆 Sally 🗸
Primary Born	#: 777-1616630796061 Der: Erica Sample The: EClosing DD: 333727 # #: 1616630796081 (Version: 1)	Company: DSI TEST LENDER (SALES) Contact: Michael Morford Email: mikem@docmagic.com Phone: (800) 649-1362	COUNTDOWN TO CLOSING	UTES SECONDS PDT Edit
Details	eJournal 🏷 Action Log			📸 Ready to Close
Signers (2) 🔒				
# Signer Name / Email	Role Notary Name / Email	Notary Type / KBA / Status Closing Date - Time	ID Verify / Status Status	e Sign
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@exampt	Settlement Agent Unassigned		Ready to Sign	Open Signing Room
Documents (15)	▼ B Ø B B G		Pri	eview Mode ON
# eSign Enabled		Pag	e(s) Signer(s)	Completed
1 Uniform Residential Loan	Application	2	9 1	
2 MERS California Deed of	Trust	đ	6 2	~
3 Specific Closing Instruction	ons	:	3 2	~
4 California Hazard Insuran	ce Disclosure		1 1	~
5 Hazard Insurance Authori	zation and Requirements	2	2 1	~
6 Borrower Consent to the	Use of Tax Return Information	3	1 1	~
	•	DØLL		
hala ya ya m				



Adding Documents

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

	Loan #: 777-1616630796081 Primary Borrower: Erica Sample Type: EClosing Package ID: 333727 Worksheet #: 1616530796081 (Version: 1		Contact: Mic Email: mil	SI TEST LENDER (SALES) chael Morford kem@docmagic.com 00) 649-1362	DAYS HO	CLOSING URS MINUTE 	-
🚱 Open	S.			×			
\leftarrow \rightarrow \checkmark \uparrow \blacksquare > Th	is PC > Desktop >	~	・ じ 、	rch Desktop			Ready to Close
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Elkhorn Valley Ba ^	Name	Date modified	Туре	Size	、		
Fairway Independent	📕 WWN	8/6/2020 3:06 PM	File folder		D Verify / Status	Status	eSign
OneDrive	61G1jfC9qPL_AC_SL1000_jpg	8/25/2020 9:30 AM	JPG File	72 KB	o verny r si lus	Julus	Collin
- OneDrive	🔊 ad_users.csv - Shortcut	1/13/2020 12:59 PM	Shortcut	2 KB	x	Not Started	Open Signing Room
🧢 This PC	🎫 Adobe Connect	11/17/2017 1:04 PM	Shortcut	1 KB			
3D Objects	🛃 appraisal.pdf	4/22/2019 11:51 A	Adobe Acrobat D	737 KB		Ready to Sign	Open Signing Room
👼 Desktop	articulate-360.exe	5/17/2019 2:54 PM	Application	85,422 KB	Pressure		Signing Room
Documents	AutoprepDocs.zip	11/8/2019 2:25 PM	Compressed (zipp	3,106 KB	Browse		
Downloads	AZACPRS.TTL.pdf	6/19/2018 9:29 AM	Adobe Acrobat D	109 KB		Previe	ew Mode ON
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Pictures	DMO Script.docx	10/29/2020 7:13 A	Microsoft Word D	36 KB	Cancel	er(s)	Completed
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🛀 OS (C:)	DocMagic eSign Demo,pptx DocMagic Intranet	5/7/2019 3:57 PM 1/30/2020 1:18 PM	Microsoft PowerPo Internet Shortcut	5,786 KB 1 KB			
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📊 Libraries 🗸 🗸		12/10/2020 7.39 A	Shortcut	5 KB	16	2	~
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4 Califo	nia Hazard Insurance Disclosure		Open	Cancel			5
4 Califo	na nazaro insurance disclosure					1	The second secon
5 Hazar	d Insurance Authorization and Requirements				2	1	~
6 Borrow	ver Consent to the Use of Tax Return Information				1	1	×

Any file you upload to the Documents section will automatically trigger AutoPrep[™]. Please visit our <u>Product Training Page</u> for comprehensive instructions on how to use it.



|Settlement Agent Portal – Post AutoPrep™'

After going through the document with AutoPrep, you will be returned to the Settlement Agent portal.

Close Console (Settlement Agent)			🙆 Sally 🔻
LOAN Loan #: 777-1616630796081 Primary Borrower: Erica Sample Type: EClosing Peckage ID: 333727 Worksheet #: 1616630796081 (Version: 1)	Company: DSI TEST LENDER (SALES) Contact: Michael Moford Email: mikem@docmagic.com Phone: (800) 649-1362	COUNTDOWN TO CLOSING	NUTES SECONDS
E Details de Journal Details			📸 Ready to Close
Signers (2)			
# Signer Name / Email Role Notary Name / Email	Notary Type / KBA / Status Closing Date - Time	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 Sig	n Open Signing Room
Documents (15) 🚦 🖋 🖪 🖨 🛆		F	Preview Mode ON
# eSign Enabled	Page	(s) Signer(s)	Completed
1 Uniform Residential Loan Application	9	1	17
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	~
	1200000		
	D/all		

Hit refresh and your newly uploaded document will show 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	 Not Started Ready to Sign 	Signing Room
01 3 Si	vliver.originator@mailinat Saily Settlement struitt@docmagic.com	Settlement Agent					 Ready to Sign 	Signing Room Open Signing Room
	ments (6) 🚦 d	/] -) 4		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 add the Leader and Other Lean Participant can add the leader of the leader of the leader of the leader the leader of the leader of the leader of the leader of the leader test of the leader of the leader of the leader of the leader end of the leader of the leader of the leader of the leader end of the leader of the leader of the leader of the leader test of the leader of the leader of the leader of the leader end of the leader of the leader of the leader of the leader test of the leader of the leader of the leader of the leader test of the leader of the leader of the leader of the leader test of the leader of the leader of the leader of the leader test of the leader of the leader of the leader of the leader of the leader test of the leader of the leader of the leader of the leader of the leader test of the leader o	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 ar: Erica Sample te: 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

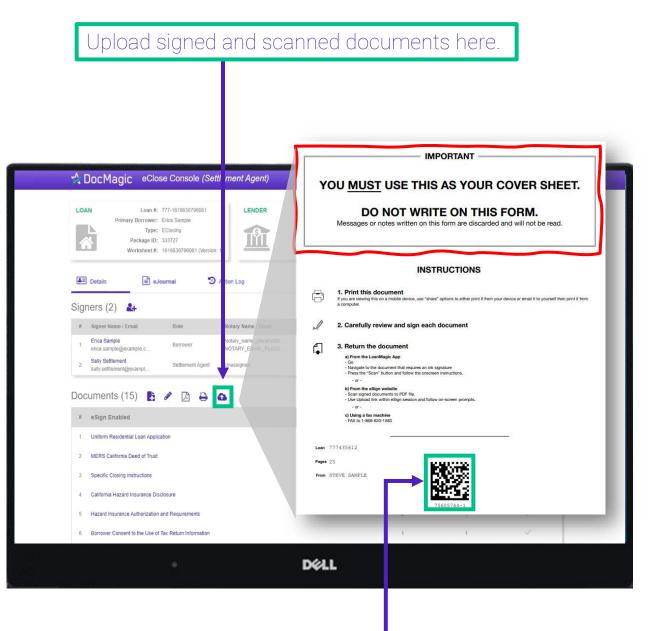
Printer Icon allows you to download documents that require wet signatures.

LOAN Loan #: 777-16166307960 Primary Borrower: Erica Sample Type: Eclosing Package ID: 333727 Worksheet #: 1616630796081 (V	LENDER Company: DSI TEST LEN Contact: Michael Morfor Ernait: mikem@docmt	DER (SALES) DAYS 1 gic.com	DWN TO CLOSING	-
E Details	Action Log		I	Ready to Close
Signers (2)				
# Signer Name / Email Role	Notary Name / Email Notary Type / Closing Date - Time	KBA / Status ID Verify	/ Status Status	eSign
Erica Sample erica.sample@example.c Borrower	Notary_name_placeholde 3/25/2021 - 12:00am NOTARY_EMAIL_PLACE	Dro Dr	Not Started	Open Signing Room
2 Sally Settlement sally.settlement@exampl Settlement Ag	nt Unassigned		Ready to Sign	Open Signing Room
Documents (15) 🖪 🖋 🖪	à a		Previ	ew 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 Retur Informat	tion	1	1	×
•	DØLL			

PDF Icon allows you to download and print **all** the 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	~
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
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Ready to Close

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

Close Console (Settlement Agent)				🙆 Sally 🔻
LOAN Loan #: 777-1616630796081 Primary Borrower: Erica Sample Type: Eclosing Package ID: 333727 Worksheet #: 1616630796081 (Version: 1)	ompany: DSI TEST LENDER (SALES) Contact: Michael Morford Email: mikem@docmagic.com Phone: (800) 649-1362	DAYS —	TO CLOSING	-
E Details Details Action Log		L	→	替 Ready to Close
Signers (2) 🚨				
# Signer Name / Email Role Notary Name / Email	Notary Type / KBA / Status Closing Date - Time	ID Verify / Statu	s Status	eSign
1 Erica Sample Borrower Notary_name_placehoide erica.sample@example.c Borrower NOTARY_EMAIL_PLACE	3/25/2021 - 12:00am	0	Not Started	Open Signing Room
2 Sally Settlement sally settlement@exampl Settlement Agent Unassigned			Ready to Sign	Open Signing Room
Documents (16) 📑 🖋 📴 🖨 🟠			Previe	w Mode off
# eSign Enabled	Pag	e(s)	Signer(s)	Completed
1 Uniform Residential Loan Application	S		1	$\overline{\mathbf{v}}$
2 MERS California Deed of Trust	1	6	2	~
3 Specific Closing Instructions	3	3	2	~
4 California Hazard Insurance Disclosure	1		1	~
5 Hazard Insurance Authorization and Requirements	2	2	1	~
6 Borrower Consent to the Use of Tax Return Information	1		1	~

Preview Mode will turn off automatically when the Clock hits Zero and signing begins. The Lender can change the Settlement Agent's ability to toggle.



35



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		S Reply	Reply All	> Forward	ij		
To Alan Dai Start your reply all v th: Completed. Signed. Th	nanks! I signed it. (i) Feedback		Mon 3/18	/2024 3	:08 PM	
John Smith, Your closing of suments are ready to be elect	tronically signed! Please	e click the link b	low to electron	ically sign v	our clos	sina	
documents.	a sinisaliy signou: 1 least	Shok the lift b	10 0100101	iouny orgin y	541 0100	y	
<u>Click here to sign</u>							
Please be advised that some documents con notary. If your closing package contains any	tained in your closing pa of these documents, the	ackage may req y will be clearly	uire an ink sign marked and sig	ature by you gned at your	ı and/or	ra	
scheduled closing appointment. Have a great closing!							
DSI TEST LENDER (SALES)							
BOILDI LENDER (GALLS)							
					12 100000 1		



Logging In - Verification

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

	Control Contr	1370	



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 ow	Closing Documents ver's Certification, Authorization and Consent		Start signing		
BORROWER'S CERTIFICATION, A JT Loss Number: 777032520240003 Date: December 21, 2023 Provided Bt: DSI TEST LENDER (SALES)		•	All documents Borrower's Certification, Authorization and Multistate Fixed Rate Note New Jersey Mortgage (MERS) New Jersey Addendum to Residential Mort	2 3 1	
Berrower: JOHN SMITH Property Address: 935 WILLOW STREET, FRISCO, Nex Preparing your The undersigned certify the following:			Uniform Residential Loan Application Addendum to Closing Instructions Specific Closing Instructions Hazard Insurance Authorization and Requir IVES Request for Transcript of Tax Return		
		8	Closing Disclosure Customer Identification Verification Hardship Letter Initial Escrow Account Disclosure Statement New Jersey Initial Tax Authorization Notice		
AUTHORIZATION TO RELEA As part of our mortgage loan application process, Lender an contained in my our loan application and in other documents re-		+	New Jersey Private Well Testing Act Certifi 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.

Please review your do	ocuments.	Bor		Documents Authorization and Cons	sent	Start s	igning
	BORROWER CONSE	ENT TO THE U	SE OF TAX RETURN	INFORMATION	a Î	All documents 👻	
	nd, acknowledge, and agree t on for purposes of:	hat the Lender and (Other Loan Participants can	obtain, use and share tax return		Borrower's Certification, Authorization a	2
(i)	providing an offer;					Multistate Fixed Rate Note	6
(ii) (iii) (iv)				ng, and securitizing a loan; or acy and data security laws.; or	e	New Jersey Mortgage (MERS)	0
		ates, agents, servic	e providers and any of afor	ementioned parties' successors		New Jersey Addendum to Residential M	
and assign						Uniform Residential Loan Application	
or acquire	ers of any beneficial or other	interest in the loan,	any mortgage insurer, guar	g from your loan application, antor, any servicers or service		Addendum to Closing Instructions	
providers	for these parties and any of a	aforementioned pa	rties' successors and assign	S.		Specific Closing Instructions	L
						Hazard Insurance Authorization and Req	
L	Signature					IVES Request for Transcript of Tax Return	
Borrower	JOHN SMITH	Date	Borrower	Date		Closing Disclosure	
						Customer Identification Verification	
					13	Hardship Letter	
					+	Initial Escrow Account Disclosure State	
						New Jersey Initial Tax Authorization Noti	

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.

Please review your documents.			Documents	1	Star	t signing
lease review your documents.	Bor	rower's Certification	, Authorization and Conser	nt	Star	t signing
BORROWER	CONSENT TO THE U	SE OF TAX RETURN	INFORMATION	ē	All documents	-
I understand, acknowledge, an information for purposes of:	nd agree that the Lender and	Other Loan Participants can	obtain, use and share tax return		Borrower's Certification, Authorization a	Î
 (i) providing an offer (ii) originating, maint 		g, servicing, selling, insur	ing, and securitizing a loan; or		Multistate Fixed Rate Note	
			vacy and data security laws.; or		New Jersey Mortgage (MERS)	()
The Lender includes the Lend and assigns.	ler's affiliates, agents, servio	e providers and any of afor	ementioned parties' successors		New Jersey Addendum to Residential M	
The Other Loan Participants	ncludes any actual or potent	ial owners of a loan resulti	ng from your loan application.		Uniform Residential Loan Application	
or acquirers of any beneficial providers for these parties an	Addendum to Closing Instructions					
					Specific Closing Instructions	
Signature					Hazard Insurance Authorization and Req	
Borrower JOHN SMITH	Date	Borrower	Date		IVES Request for Transcript of Tax Return	
					Closing Disclosure	
				0	Customer Identification Verification	
				с	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.

Completed					US Customer	_
ease review your documents.	Closing Documents Borrower's Certification, Authorization ar	d Consent			My Documents	
	NT TO THE USE OF TAX RETURN INFORMATION at the Lender and Other Loan Participants can obtain, use and share t	ax return		All do Borrow Multist	Change Email Address Withdraw Consent Terms of Use) 3.
(iii) as otherwise permitted by ap (iv) marketing	inaging, monitoring, servicing, selling, insuring, and securitizing a plicable laws, including state and federal privacy and data security ites, agents, service providers and any of aforementioned parties' st	laws.; or			Save & Exit Residential Loan Application In to Closing Instructions	1
or acquirers of any beneficial or other in	ay actual or potential owners of a loan resulting from your loan app nterest in the loan, any mortgage insurer, guarantor, any servicers o forementioned parties' successors and assigns.		:	Specific (Hazard In	losing Instructions surance Authorization and Req uest for Transcript of Tax Return	
Signature					isclosure	
Borrower JOHN SMITH	Date Borrower	Date		Custome Hardship	Identification Verification	
		+			row Account Disclosure State ey Initial Tax Authorization Noti	



Document Information

☆DocMagic	🛈 Review 🔵 Sign 🥐 Completed		R	JOHN SMITH Customer
lease review your documents.	Closing Documents Clorrower's Certification, Authorization and Conse	ent		Start signing
I understand, acknowledge, and agree that the Lender a information for purposes of: (i) providing an offer; (ii) originating, maintaining, managing, monito (iii) as otherwise permitted by applicable laws, (iv) marketing The Lender includes the Lender's affiliates, agents, se and assigns. The Other Loan Participants includes any actual or po	USE OF TAX RETURN INFORMATION nd Other Loan Participants can obtain, use and share tax return oring, servicing, selling, insuring, and securitizing a loan; or including state and federal privacy and data security laws.; or rvice providers and any of aforementioned parties' successors ential owners of a loan resulting from your loan application, an, any mortgage insurer, guarantor, any servicers or service parties' successors and assigns.	•	Closing Documents Version 1 · ID: 1158504 Loan Number 777032520240003 Package Details 16 documents · 55 total pag Date sent March 25, 2024 Expiration Date N/A Sent by Steve Truitt struitt@docmagic.com DSI TEST LENDER (SALES)	Jes
Signature Borrower JOHN SMITH Date	Borrower Date	+		

Click the information icon to see document package metadata.



Participants

🛠 DocMagic	💿 Review 🔵 Sig	gn 🥐 Completed		JS JOHN S Custom	
Please review your documents.	Closing Docu Borrower's Certification, Aut			Sta	rt signing
I understand, acknowledge, and agree that the information for purposes of: (i) providing an offer; (ii) originating, maintaining, manag (iii) as otherwise permitted by application (iv) marketing The Lender includes the Lender's affiliates, and assigns. The Other Loan Participants includes any as	TO THE USE OF TAX RETURN INFO e Lender and Other Loan Participants can obtain ng, monitoring, servicing, selling, insuring, at able laws, including state and federal privacy a agents, service providers and any of aforement tual or potential owners of a loan resulting fro st in the loan, any mortgage insurer, guarantor mentioned parties' successors and assigns.	h, use and share tax return nd securitizing a loan; or nd data security laws; or tioned parties' successors m your loan application,	JOHN aland@ Custor BO BYRON aland@	SMITH)docmagic.com	23. T
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	a
	(ii) originating, maintaining, managing, monitoring, servicing, selling, insuring, and securitizing a loan; or (iii) as otherwise permitted by applicable laws, including state and federal privacy and data security laws; ; or (iv) marketing The Lender includes the Lender's affiliates, agents, service providers and any of aforementioned parties' successors and assigns.		Multistate Fixed		<u>د</u>
and assigns. The Other Loan Participants includes or acquirers of any beneficial or othe	any actual or potential owners of a loar r interest in the loan, any mortgage insu a forementioned 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 Disclosu Borrower's Certification, Autho			Start sign	iing
			a Î	Borrower's Certification, Authorization and	
BORROWER CONSENT TO	THE USE OF TAX RETURN INFORM	ATION		Addendum to Loan Application	
I understand, acknowledge, and agree that the Le information for purposes of:				California Domestic Partnership Addendu	ð
				Uniform Residential Loan Application	í
	monitoring, servicing, selling, insuring, and se laws, including state and federal privacy and d			IVES Request for Transcript of Tax Return	
(iv) marketing	ender includes the Lender's affiliates, agents, service providers and any of aforementioned parties' successors				
The Lender includes the Lender's affiliates, ages and assigns.	The Lender includes the Lender's affiliates, agents, service providers and any of aforementioned parties' successors and assigns.				
	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				
or acquirers of any beneficial or other interest in providers for these parties and any of aforement		y servicers or service		California Fair Lending Notice	
				California Hazard Insurance Disclosure	
Signature				Housing Counselors Near You	
Borrower JOHN SMITH	Date Borrower	Date		Important Information About Procedures f	
↑				Iowa Subordination Agreement	
				Lender Record Change	
				Loan Estimate	
			_		

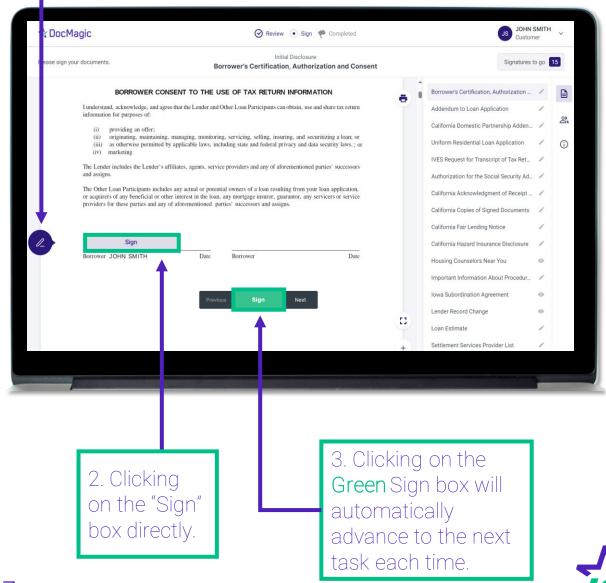
You can't sign anything until you hit the purple button in the top right corner – until then, these will remain greyed out and unsingable.



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.

A Dock	1agic		🚫 Review 💿 Sign 🥐 Completed					~
Please sign y	your documents.		Initial Disclosure			Signatures t	o go 🚺	5
		Select Your Signature			×			
	I understand, a information fo	Choose Draw Upload				ation, Authorization	1	
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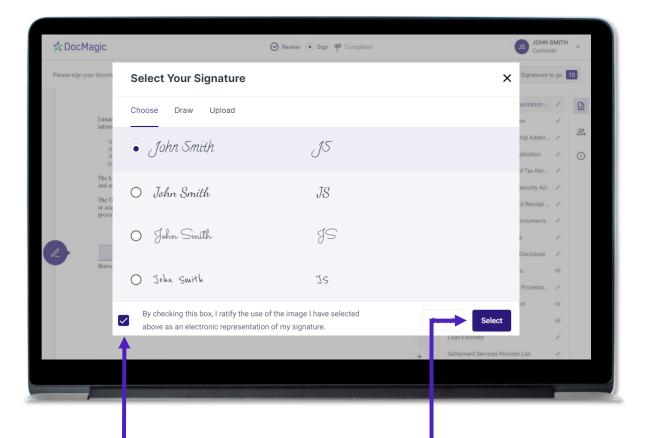
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Regardless of what option is chosen, you must check the box authorizing the use of an electronic signature and then hit Select.



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.

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Keeping Track of Your Progress

The countdown feature shows how many signatures remain.

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Keeping Track of Your Progress

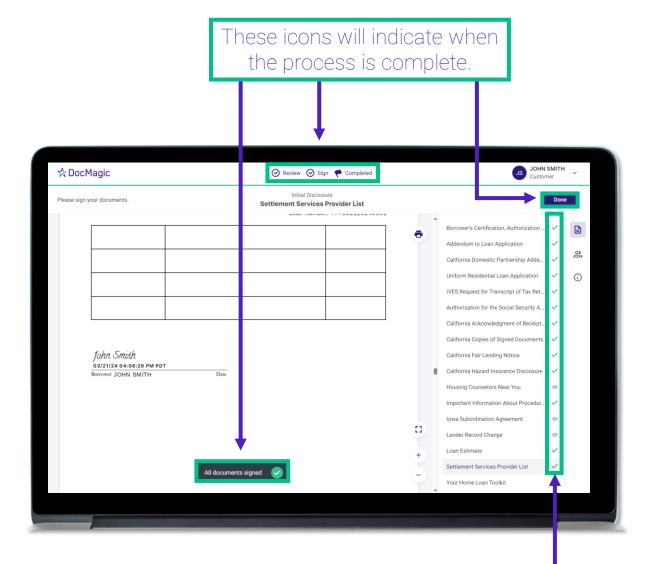
You can also check the signed status of each document via these **green** check marks.

Please sign your documents.	Closing Documents Acknowledgment of Receipt of Appraisal Repor	t	Signatures go	•
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		California	Domestic Partnership Ad	8
	Loan Number: 1025202100001	Uniform R	esidential Loan Application	
	Date: OCTOBER 25, 2021	General C	osing Instructions	0
	Lender: DSI TEST LENDER (ALAN DAI)	Multistate	Fixed Rate Note	
	Borrower: MICHAEL SAMPLE	California	Deed of Trust	
	Property Address: 123 MAIN ST TORRANCE, CALIFORNIA 90501	Specific Cl	losing Instructions	
	Under federal law, the creditor is required to provide you a copy of all appraisals or other written valuations		Certification and Authori	
	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,		of Loans to One Borrowe	
	promptly upon completion, or three business days prior to consummation, whichever is earlier.		surance Authorization and	
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When Complete

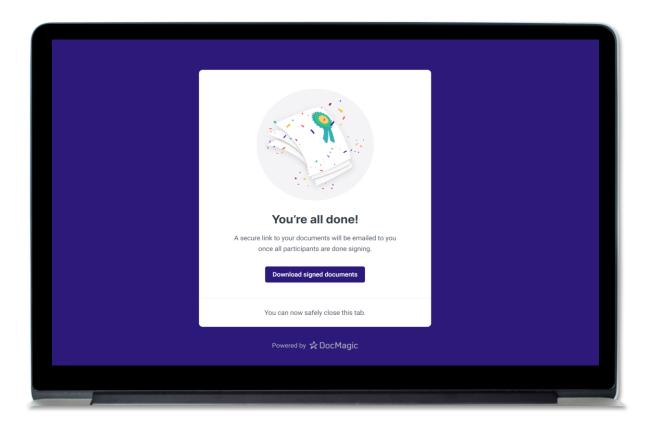


All applicable checkmarks will be green.



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.

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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.

Type: EClosing Package ID: 333727 Worksheet #: 1616630796081 (V	arsion: 1)	Company: DSI TEST LENDE Contact: Michael Morford Email: mikem@docmagi Phone: (800) 649-1362		DAYS Date: Apr 19, 2023 (V		TES SECONDS - DT Edit
E Detais eJournal	Action Log					📸 Ready to Close
# Signer Name / Email Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1 Erica Sample erica.sample@example.c Borrower	Notary_name_placeholde NOTARY_EMAIL_PLACE	3/25/2021 - 12:00am	⊡ * 0	0	Finished	Open Signing Room
2 Sally Settlement sally.settlement@exampl Settlement Ag	ent Unassigned				Ready to Si	Open Signing Room
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# eSign Enabled	a				igner(s)	Completed
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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.

Documents (16) 🖪 🖨 🛆			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	~
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	3	~
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.

STORE AND DELTA CAR DESCRIPTION OF THE STORE	A REAL PROPERTY AND A REAL	10000
Thank you - Electronic Signing Completed		
docs@docmagic.com	$ \textcircled{\begin{tabular}{lllllllllllllllllllllllllllllllllll$	
To Alan Dai	Tue 4/30/2024 11	1:38 AM
Start your reply all with: Completed. Please confirm receipt. All done! (i) Feedback		
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	documents in the future.	
You may access your electronically signed documents at any time. Click here to access you	our documents now	
	a 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>		
DØLL		

The email will allow the Borrower to download their signed and notarized document package from a provided link.

