



eClose with AutoPrep™ – Hybrid 1
With Settlement Agent Portal and Borrower's Experience

GUIDEBOOK

Hybrid 1 eClose

Hybrid #1

- Paper Note
- Paper Notary
- All Other Documents Electronic ✓

Hybrid #2

- eNote
- Paper Notary
- All Other Documents Electronic

Hybrid #3

- Paper Note
- eNotary
- All Other Documents Electronic

Total eClose™

- eNote
- eNotary
- All Other Documents Electronic



Hybrid 1 eClose Process

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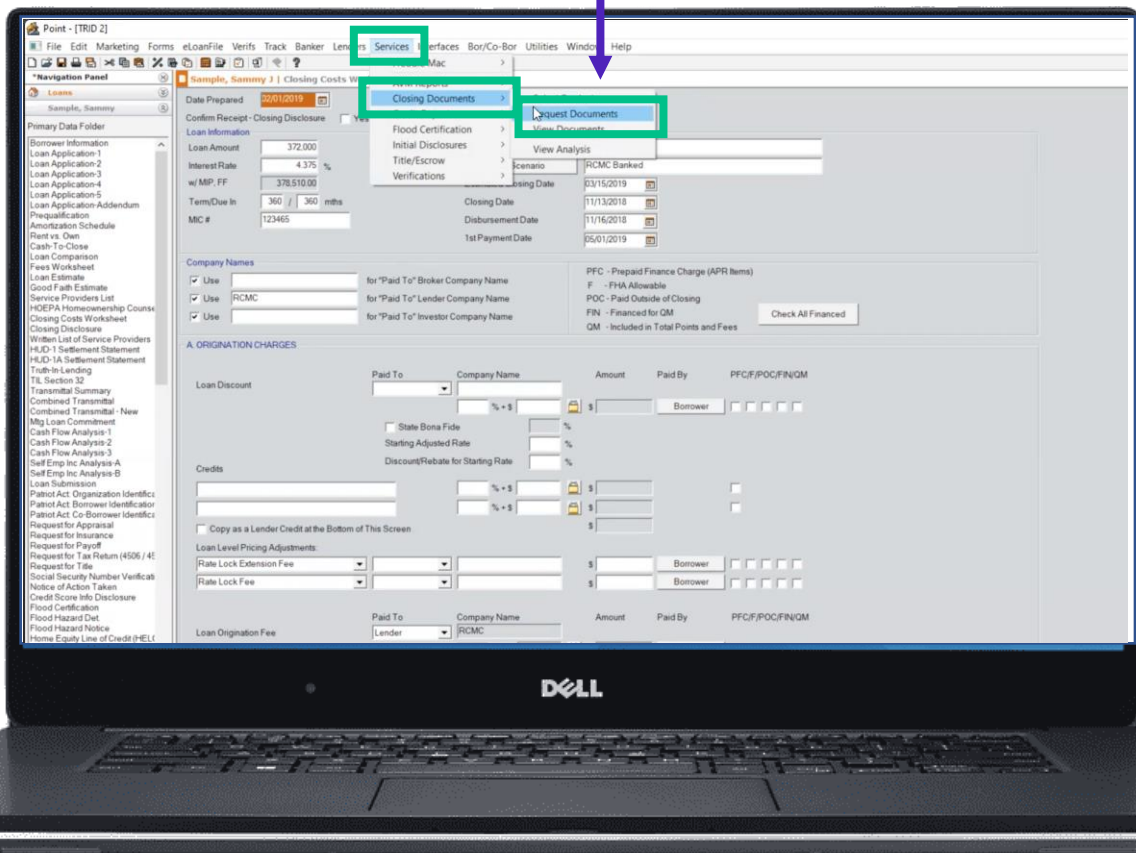




Processing Closing Documents in LOS

Closing Documents in Your LOS

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



Closing Documents in Your LOS

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

The screenshot displays the DocMagic software interface. At the top, there is a navigation bar with the following menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. Below this is a window titled "DocMagic - Borrower One Sample (#21)" with a standard menu bar (File, Edit, Services, Tools, Help) and a toolbar containing icons for Open, Save, New, Copy, Import, Default, Data Capture, Audit, Details, APR, Sec32, Impound, Process, View, Generate, Email, Appraisal, Delivery, UCD, Collaboration, eSign, and LoanMagic Portal. The main interface features a series of tabs: General, Borrowers/Sellers, Property, **Closing**, Providers/Liens, Charges/Fees, Prepays/Impounds, Underwriting, and Summaries. The "Closing" tab is currently selected. The "General Information" section includes fields for Loan Stage (set to CLOSING), Loan Program (ALL FIXED LOANS (DSI_CONV)), Alternate Lender, Transfer To, Broker Name, Origination, Loan Rep, Loan Type (CONVENTIONAL), Loan Purpose (PURCHASE), Type, Lien Position, Loan Number, MIC / Agency #, and Loan Identifiers. The "Dates & Times" section includes fields for Application Date, Pre-Z Send Date, Estimate Issue Date, Est. Available Through, Intent to Proceed Date, Rate Lock Date, Rate Available Thru, Lock Days Prior to Close, CD/Re-disc Date/Method, CD/Re-disc Rec'd Date, Document Date, Closing Date, Signing Date, Cancel Date, and Disbursement Date. A Dell logo is visible at the bottom center of the monitor.



Loan Detail Report

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

The screenshot shows the DocMagic software interface. A window titled 'Data Validation - Worksheet #1' is open, with a 'Details' button highlighted in a green box. A blue arrow points from the text above to this button. Below the button, a 'Loan Detail Report' window is displayed, showing the following information:

Loan Number:	777012520220001	File ID:	2252
Borrower Name:	JOHN SMITH	Client Number:	100SALES
Property Address:	935 WILLOW STREET, BURLINGTON NJ 08016	Date of Report:	01/25/2022

The report also includes sections for Lender Info, Loan Identifiers, and Important Dates.



Processing Documents – Hybrid 1

Process the Document set.

The screenshot shows the DocMagic software interface. A window titled "Data Validation - Worksheet #1" is open, displaying a list of 8 warning issues and 2 messages. The "Process" button in the toolbar is highlighted with a green box. A blue arrow points from the text "Process the Document set." to this button.

Type	Message	Category	Details
WARNING	Document Date is more than '5' days in the past	DataValidation	
WARNING	Deficiency Rights Preserved information not provided. Default option will be used.	Federal-TRID	
WARNING	Settlement Agent is missing Email, License ID.	DataValidation-Service...	
WARNING	Only escrowed items included in Estimated Taxes, Insurance, and Assessments. Ensure all mortgage-related obligations are entered.	Federal-TRID	
WARNING	Purchase Transaction with no prepaid Homeowner's Insurance detected.	DataValidation	
WARNING	You have entered Broker Information on a non-brokered loan, please ensure this is correct.	DataValidation	
WARNING	Intent to service or transfer service indicator is blank.	TRID	
WARNING	Transfer Taxes (TSF) \$35.00 exceeds baseline amount \$0.00, Fee violates TILA/RESPA Tolerance.	Federal-TRID	
MESSAGE	Worksheet Saved		
MESSAGE	Worksheet Audited (outstanding audits detected)		

CALCULATION

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



Processing Documents – Hybrid 1

Choose "Closing"
for Package Type.

The screenshot displays the DocMagic software interface. A 'Data Validation Worksheet #1' window is open, showing a warning message: '8 Warning Issues have been detected.' Below this, a 'Document Processing Options' dialog box is visible. The dialog box has several sections: 'General Options' with 'Package Type' set to 'Closing'; 'Loan Application' with 'FNMA 3.x File' and a 'Browse' button; 'Electronic Delivery' with 'DocMagic eSign' and 'eSignature enable' checked; 'Security' with 'Require Password', 'Retrieval Notification', and 'Disable Recipient Printing' options; and 'Additional Services' with 'Print and Deliver', 'Flood Certification', and 'MERS Registration' options. A 'Process' button is at the bottom of the dialog box. A blue arrow points from the 'Package Type' dropdown to the 'Choose "Closing" for Package Type.' text box. Another blue arrow points from the 'DocMagic eSign' and 'eSignature enable' checkboxes to the 'Select DocMagic eSign if utilizing DocMagic eSign Platform AND Select eSignature enable.' text box.

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

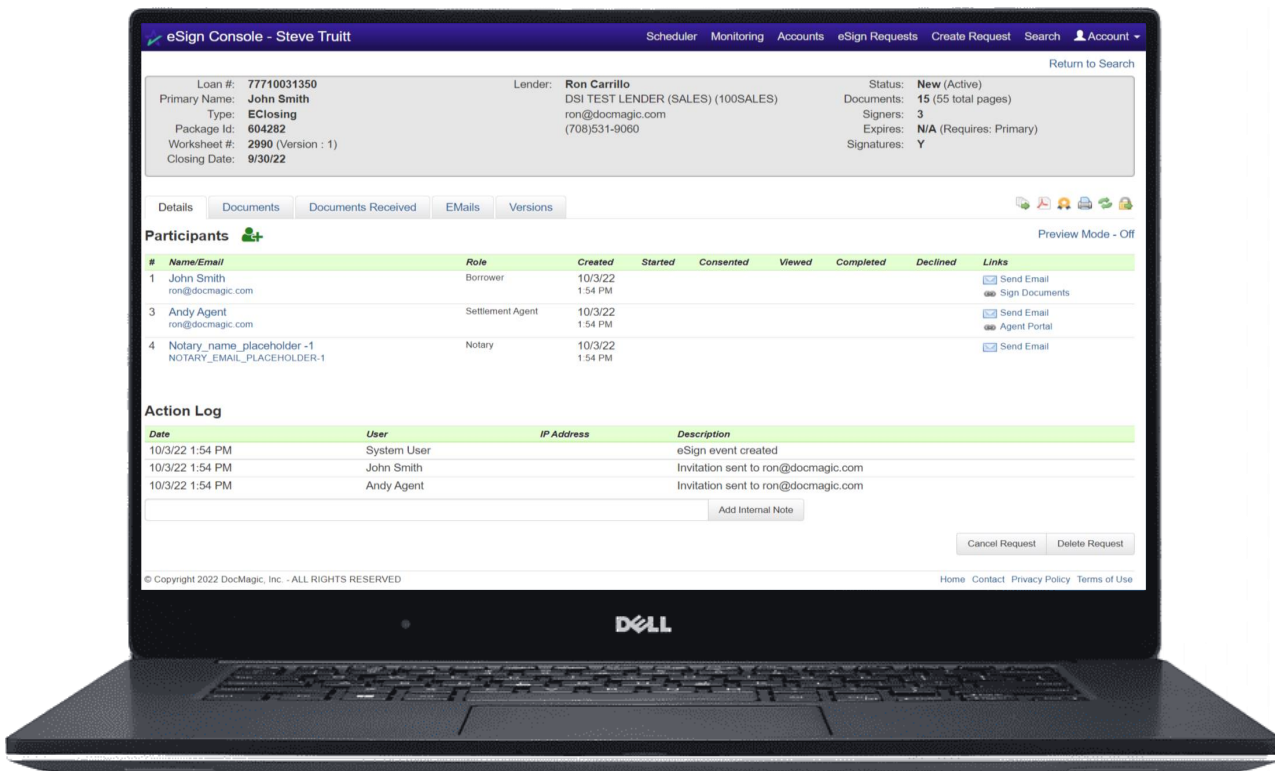




Lender Portal

Lender Portal

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



For detailed instructions on how to use the eSign Console / Lender Portal, please visit our [Product Training Page](#).



Lender Portal

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

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area is divided into several sections:

- Loan Details:** Loan #: 77710031350, Lender: Ron Carrillo (DSI TEST LENDER (SALES) (100SALES)), Status: New (Active), Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y.
- Participants Table:** A table with columns: #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, Links. The 'Links' column for the Borrower and Settlement Agent includes a 'Send Email' link, which is highlighted by a callout box.
- Action Log:** A table with columns: Date, User, IP Address, Description. It shows three entries: 'eSign event created', 'Invitation sent to ron@docmagic.com', and 'Invitation sent to ron@docmagic.com'.

At the bottom of the interface, there are buttons for 'Cancel Request' and 'Delete Request', and a footer with copyright information and links to Home, Contact, Privacy Policy, and Terms of Use.



Lender Portal

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

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: 77710031350 Lender: Steve Truitt Status: New (Active)
Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES) Documents: 15 (55 total pages)
Type: EClosing struitt@docmagic.com Signers: 2
Package Id: 604824 (800)649-1362 Expires: N/A (Requires: Primary)
Worksheet #: 2990 (Version : 2) Signatures: Y (Ink Sign)
Closing Date: 9/30/22

Details Documents Documents Received EMails Versions

Documents

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq	Document Id	Document Id	Filename	Delete	Operation
1 Borrower's Certification, Authorization and Consent	✓	2	1	1			5175538 5187039		bcac.msc.xml		
2 Multistate Fixed Rate Note		0/4	1	1			5175539 5187040		us3200.not.xml		Mark as Complete
3 New Jersey Mortgage (MERS)		0/19	1	1			5175540 5187041		nj3031.mzm.xml		Mark as Complete
4 Uniform Residential Loan Application	✓	7	1	1			5175541 5187042		urla.msc.xml		
5 Uniform Residential Loan Application - Lender Loan Information	✓	2	0	0	✓		5175542 5187043		urlalli.msc.xml		
6 Addendum to Closing Instructions	✓	1	1	1			5175543 5187044		atci3.msc.xml		
7 Specific Closing Instructions	✓	3	4	2			5175544 5187045		sci.msc.xml		
8 Hazard Insurance Authorization and Requirements	✓	2	1	1			5175545 5187046		hazard8.lsr.xml		
9 IVES Request for Transcript of Tax Return	✓	2	2	1			5175546 5187047		4506c.msc.xml		
10 Closing Disclosure	✓	5	1	1			5175547 5187048		cd.dsc.xml		
11 Customer Identification Verification	✓	2	0	0	✓		5175548 5187049		civ.msc.xml		
12 Initial Escrow Account Disclosure Statement	✓	2	1	1			5175549 5187050		ieads.msc.xml		
13 New Jersey Initial Tax Authorization Notice	✓	1	0	0	✓		5175550 5187051		njitan.msc.xml		
14 New Jersey Private Well Testing Act Certification	✓	1	1	1			5175551 5187052		njpw.tsc.xml		
15 Signature Affidavit and AKA Statement		0/2	1	1			5175552 5187053		saakas.msc.xml		Mark as Complete

Add Internal Note

You can check the status of the signature process here.



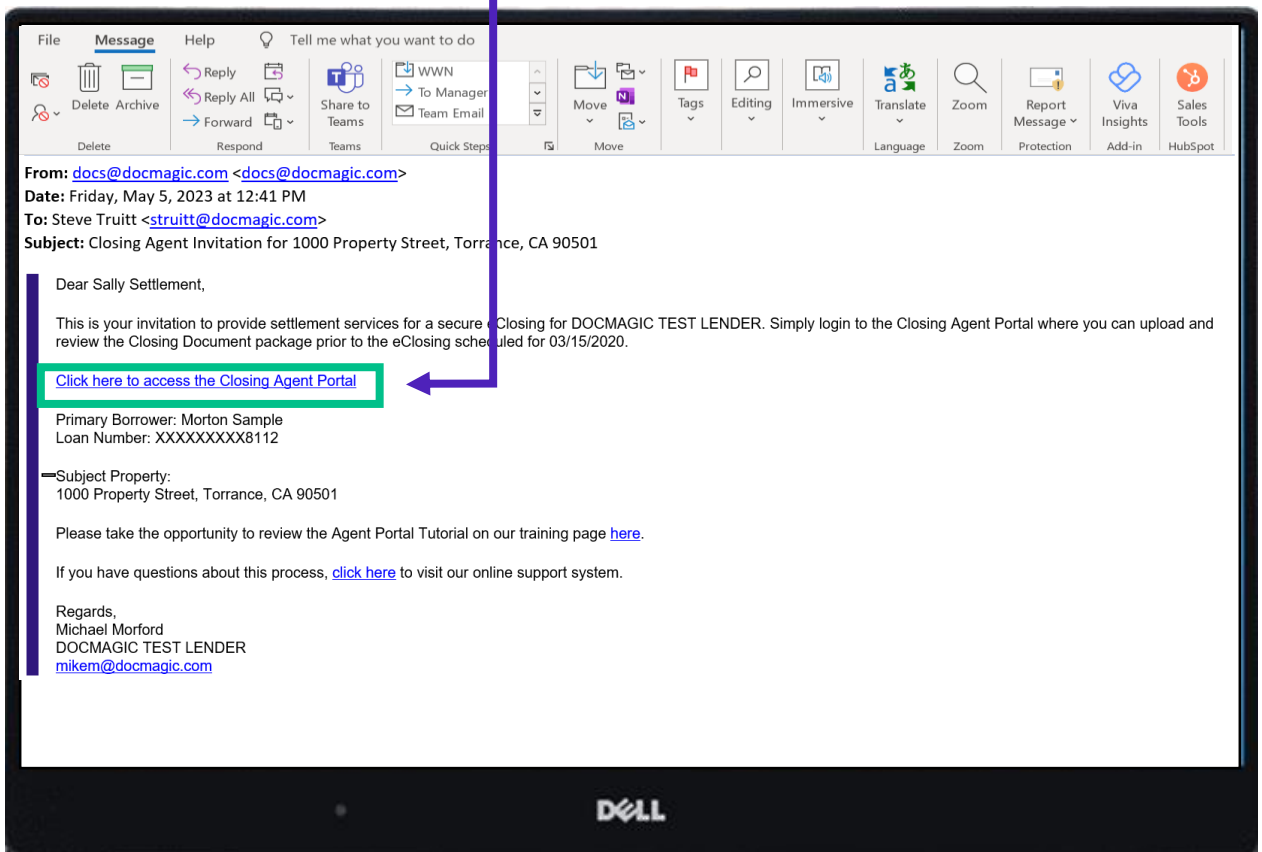


Settlement Agent Process

Settlement Agent Invitation Email

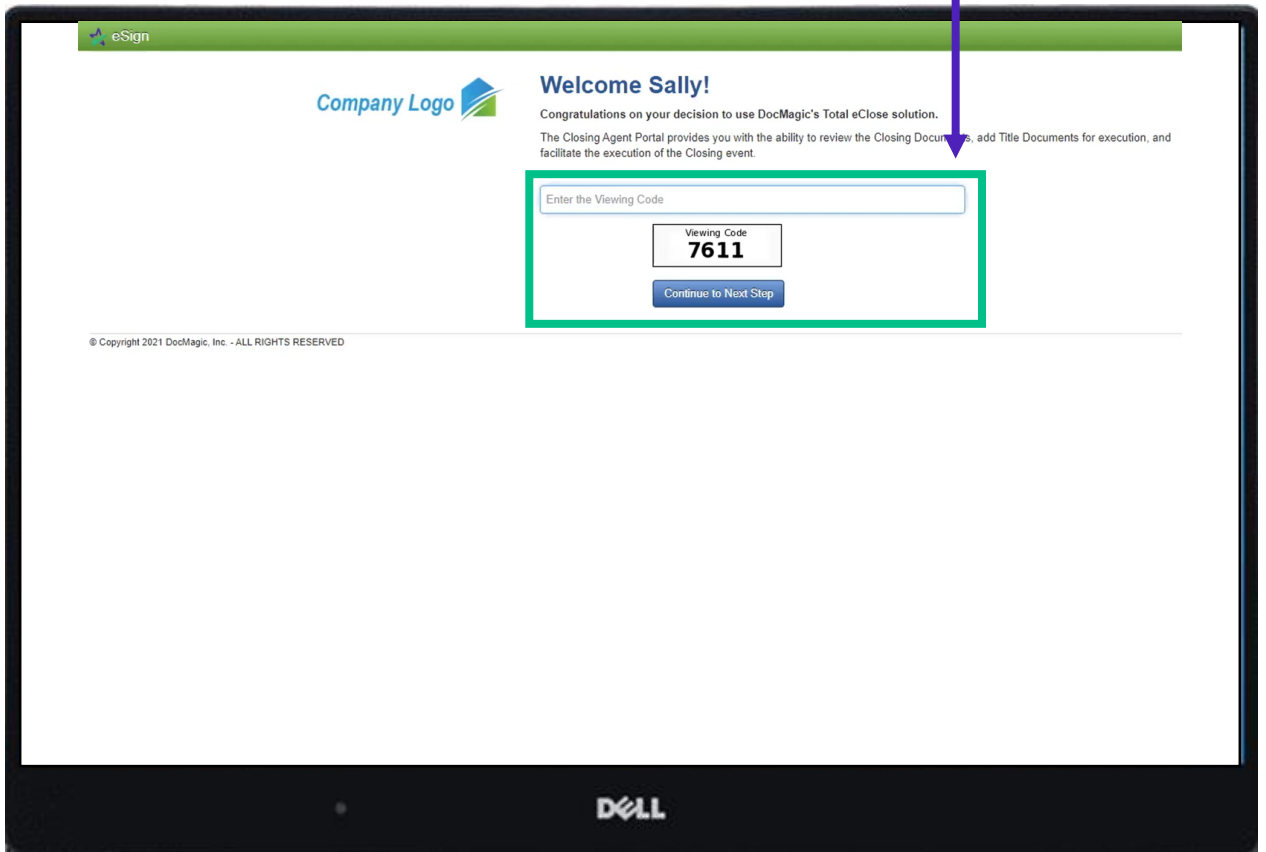
The Settlement Agent will receive an invitation email when the lender creates the eClose event.

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



Agent Login

The Settlement Agent will receive an invitation email and arrive at this verification page.



eClose Console

This is the Settlement Agent's portal where you can check documents, assign signers, and verify the process as you go.

All pertinent loan information is at the top of your screen including borrower and lender info.

The screenshot displays the DocMagic eClose Console (Settlement Agent) interface. At the top, the user is logged in as Sally. The main content area is divided into several sections:

- LOAN:** Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER:** Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Navigation:** Details, eJournal, Action Log, and a Ready to Close button.
- Signers (2):** A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign options.
- Documents (15):** A table listing documents with columns for eSign Enabled, Page(s), Signer(s), and Completed status.

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

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



Countdown Clock

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

DocMagic eClose Console (Settlement Agent) Sally ▾

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

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

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[Details](#) [eJournal](#) [Action Log](#) [Ready to Close](#)

Signers (2)

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

Documents (15) [📄](#) [✍️](#) [📄](#) [🖨️](#) [🔄](#) Preview Mode

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

DELL



Help Button

From the Agent Portal, you can find a tutorial just like the one you're reading now. Just click on the name, then Help.

DocMagic eClose Console (Settlement Agent)

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

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

COUNTDOWN TO CLOSING
DAYS: -
HOURS: -
Date: Apr 19, 2023 (Wed)

Dashboard
My Account
Preferences
Contact Us
Help
Sign Out

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	📧	📷
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned			

Documents (15)

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



Signer's Tab

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

The screenshot shows the Doc Magic eClose Console interface. At the top, there's a navigation bar with 'Doc Magic eClose Console (Settlement Agent)' and a user profile 'Sally'. Below this, there are sections for 'LOAN' (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1)), 'LENDER' (Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362), and 'COUNTDOWN TO CLOSING' (Date: Apr 19, 2023 (Wed) Time: 12:00am PDT). A navigation bar includes 'Details', 'eJournal', and 'Action Log'. The 'Signers (2)' section is highlighted with a green box and contains a table with the following data:

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

Below the signers table is a 'Documents (15)' section with a 'Preview Mode' toggle set to 'ON'. It contains a table with the following data:

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



Signer's Details

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

The screenshot displays the DocMagic eClose Console interface. A modal window titled "Participant Details" is open, showing the following information:

- View, edit, or delete the participant's information below.**
- First Name:** Erica
- Last Name:** Sample
- Email:** erica.sample@example.com
- Phone Number:** () - -
- Access Code:** 0001
- Role:** Borrower

At the bottom of the modal are three buttons: "Cancel", "Delete", and "Save".

In the background, the "Signers (2)" list is visible, with "Erica Sample" highlighted. The "Documents (15)" list includes items like "Uniform Residential Loan Application" and "MERS California Deed of Trust".



Adding Participants

Click on the Silhouette Icon to add a participant.

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

The screenshot displays the DocMagic eClose Console interface. A central dialog box titled "Add Participant" is open, prompting the user to "Add the participant's information below." The dialog contains the following fields: First Name, Last Name, Email, Phone Number (with a format guide: (____)____-____), Access Code, and Role (with a dropdown menu currently set to "Select Role"). At the bottom of the dialog are "Cancel" and "Add" buttons, with the "Add" button highlighted by a green box. In the background, the "Signers (2)" section shows a list of participants: Erica Sample (erica.sample@example.c...) and Sally Settlement (sally.settlement@example.c...). The "Documents (15)" section shows a table of documents with columns for document name, page count, and completion status.

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

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



Preview Tab

Preview Mode stays on until Midnight Hawaii time of the closing date. The Lender can disable your ability to toggle preview mode in their settings.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text 'eClose Console (Settlement Agent)', and a user profile for 'Sally'. Below the navigation bar, there are three main sections: 'LOAN' details (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1)), 'LENDER' information (Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362), and a 'COUNTDOWN TO CLOSING' section showing a timer for Days, Hours, Minutes, and Seconds, with the date 'Apr 19, 2023 (Wed) Time: 12:00am PDT'. Below these sections are tabs for 'Details', 'eJournal', and 'Action Log', along with a 'Ready to Close' button. The 'Signers (2)' section contains a table with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, and Status. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent). The 'Preview Mode' toggle is highlighted with a green box and a blue arrow pointing from the text above. The 'Documents (15)' section shows a list of documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. The documents listed are: 1. Uniform Residential Loan Application (9 pages, 1 signer, completed), 2. MERS California Deed of Trust (16 pages, 2 signers, completed), 3. Specific Closing Instructions (3 pages, 2 signers, completed), 4. California Hazard Insurance Disclosure (1 page, 1 signer, completed), 5. Hazard Insurance Authorization and Requirements (2 pages, 1 signer, completed), and 6. Borrower Consent to the Use of Tax Return Information (1 page, 1 signer, completed). The Dell logo is visible at the bottom of the screen.

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

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



Documents Section

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

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

Key sections include:

- LOAN:** Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER:** Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Signers (2):** A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are shown, all marked as completed.

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

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



Documents Section

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

DocMagic eClose Console (Settlement Agent) | Sally

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

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

COUNTDOWN TO CLOSING
DAYS: -- HOURS: -- MINUTES: -- SECONDS: --
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT

Signers (2)

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

Documents (15) | Preview Mode: ON

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



Documents Section

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

The screenshot shows the DocMagic eClose Console interface. At the top, it displays the DocMagic logo and the user's name, Sally. Below the header is a table of documents. A green box highlights the 'Print and Sign' section at the bottom of the document list, which contains one document: 'Multistate Fixed Rate Note'.

#	Document Name	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓
7	California Fair Lending Notice	1	1	✓
8	California Private Mortgage Insurance Notice	2	1	✓
9	Closing Disclosure	5	1	✓
10	IVES Request for Transcript of Tax Return	2	1	✓
11	Initial Amortization Schedule	8	0	✓
12	Initial EscNew Account Disclosure Statement	2	1	✓
13	PMI Initial Disclosure - Fixed	2	1	✓
14	Signature Affidavit and AKA Statement	2	2	✓
# Print and Sign				
1	Multistate Fixed Rate Note	3/3	1	✓

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DELL



Adding Documents

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

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text 'eClose Console (Settlement Agent)', and a user profile for 'Sally'. Below the navigation bar, there are three main sections: 'LOAN' details (Loan #, Primary Borrower, Type, Package ID, Worksheet #), 'LENDER' details (Company, Contact, Email, Phone), and a 'COUNTDOWN TO CLOSING' timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. A 'Ready to Close' button is visible in the top right. The main content area is divided into 'Signers (2)' and 'Documents (15)'. The 'Signers' table lists Erica Sample (Borrower) and Sally Settlement (Settlement Agent). The 'Documents' table lists six documents, including 'Uniform Residential Loan Application', 'MERS California Deed of Trust', 'Specific Closing Instructions', 'California Hazard Insurance Disclosure', 'Hazard Insurance Authorization and Requirements', and 'Borrower Consent to the Use of Tax Return Information'. A green box highlights the 'Add Document' icon (a document with a plus sign) in the 'Documents (15)' header, with a blue arrow pointing from the text box above to it.

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

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



Adding Documents

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

The screenshot displays the DocMagic eClose Console interface. At the top, the user is logged in as 'Sally'. The main area shows loan details for Loan # 777-1616630796081, including the primary borrower Erica Sample and lender DSI TEST LENDER (SALES). A 'COUNTDOWN TO CLOSING' widget shows 0 days, 0 hours, 0 minutes, and 0 seconds. A 'Ready to Close' button is visible. In the foreground, a Windows 'Open' dialog box is open, showing the 'Desktop' location. The file 'AZACPRS.TTL.pdf' is selected. A green box highlights the 'Browse' button in the dialog, with a blue arrow pointing from the instruction box above to it. Below the dialog, a table of documents is partially visible, with columns for 'Verify / Status' and 'eSign'.

Verify / Status	Status	eSign
Not Started	Not Started	Open Signing Room
Ready to Sign	Ready to Sign	Open Signing Room
Completed	Completed	

Any file you upload to the Documents section will automatically trigger AutoPrep™. Please visit our [Product Training Page](#) 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.

DocMagic eClose Console (Settlement Agent) Sally ▾

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

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

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

Details eJournal Action Log **Ready to Close**

Signers (2)

#	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_placehold... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15) Preview Mode ON

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

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 [here](#) for the Document Editor guide.*

DocMagic eClosing Console (Settlement Agent)

LOAN Loan #: 16364816291
Primary Borrower: John Smith
Type: eClosing
Package ID: 417659
Worksheet #: 16364816291 (...)

LENDER Company: SAMPLE SONS L...
Contact: Michael Morford
Email: mikem@docmagic.com
Phone: (555) 555-5555

SETTLEMENT AGENT Company: Settlement Closing...
Contact: Sally Settlement
Email: strull@docmagic.com
Phone: (987) 555-4321

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT

Signers (3)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	John Smith strull@docmagic.com	Borrower	Doc Magic ron-test@docmagic.com	DocMagic RON 11/9/2021 - 12:00am	✓	✓	Not Started	Open Signing Room
2	Oliver Originator oliver.originator@mailnat...	Originator					Ready to Sign	Open Signing Room
3	Sally Settlement strull@docmagic.com	Settlement Agent					Ready to Sign	Open Signing Room

Documents (6)

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	✓	

California Deed of Trust (MERS)
Prepare documents for signing

BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION

I understand, acknowledge, and agree that the Lender and Other Loan Participants can obtain, use and share tax return information for purposes of:

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

The Lender includes the Lender's affiliates, agents, service providers and any of aforementioned parties' successors and assigns.

The Other Loan Participants includes any actual or potential owners of a loan resulting from your loan application, or acquires or any beneficial or other interest in the loan, any mortgage insurers, guarantors, any servicers or service providers for these parties and any of aforementioned parties' successors and assigns.

John Smith
Borrower: JOHN SMITH Date: Borrower: Date

Previous Page Next Page

Tags

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



Action Log

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

DocMagic eClose Console (Settlement Agent) Sally

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

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

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT [Edit](#)

Details eJournal **Action Log**

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

You may also add notes at the bottom.



Print Options

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

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, 'eClose Console', the user's role 'Settlement Agent', and the user's name 'Sally'. The main content area is divided into several sections:

- LOAN:** Loan #: 777-16166307990, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER:** Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Signers (2):** A table listing signers with columns for #, Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are listed, including 'Uniform Residential Loan Application', 'MERS California Deed of Trust', 'Specific Closing Instructions', 'California Hazard Insurance Disclosure', 'Hazard Insurance Authorization and Requirements', and 'Borrower Consent to the Use of Tax Return Information'.

A toolbar below the documents table contains icons for document actions. A green box highlights the printer icon, and a blue arrow points from the text above to this icon. Another blue arrow points from the printer icon to the text below.

PDF Icon allows you to download and print *all* the documents – not always necessary, just an option



Wet-sign Options

Upload signed and scanned documents here.

The screenshot displays the DocMagic eClose Console interface. On the left, the 'Documents (15)' section lists several documents, with the 'Upload' icon highlighted in a green box. A red-bordered callout box contains the following text:

IMPORTANT

YOU MUST USE THIS AS YOUR COVER SHEET.

DO NOT WRITE ON THIS FORM.
Messages or notes written on this form are discarded and will not be read.

INSTRUCTIONS

- 1. Print this document**
If you are viewing this on a mobile device, use "share" options to either print it from your device or email it to yourself then print it from a computer.
- 2. Carefully review and sign each document**
- 3. Return the document**
 - a) From the LoanMagic App
 - Go
 - Navigate to the document that requires an ink signature
 - Press the "Scan" button and follow the onscreen instructions.
 - or -
 - b) From the eSign website
 - Scan signed documents to PDF file.
 - Use Upload link within eSign session and follow on-screen prompts.
 - or -
 - c) Using a fax machine
 - FAX to 1-866-420-1583

At the bottom of the callout, a QR code is shown with the text '75605744-1' below it. A green box highlights the QR code, and a blue arrow points from the 'Upload' icon in the interface to the QR code.

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



Wet-sign Options

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

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent named Sally. The main content area shows a list of 14 documents, each with a number, title, page count, and number of signers. A green checkmark is visible in the 'Completed' column for document 11, 'Initial Amortization Schedule'. A blue arrow points from the text box above to this checkmark. Below the main list, a summary table is highlighted with a green border, showing a total of 1 document to be printed and signed, with 3/3 pages and 1 signer. The 'Completed' column for this summary row also shows a green checkmark.

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

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DELL



Ready to Close

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

DocMagic eClose Console (Settlement Agent) Sally

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

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

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT

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 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@exempl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (16)

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

Preview Mode off

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.

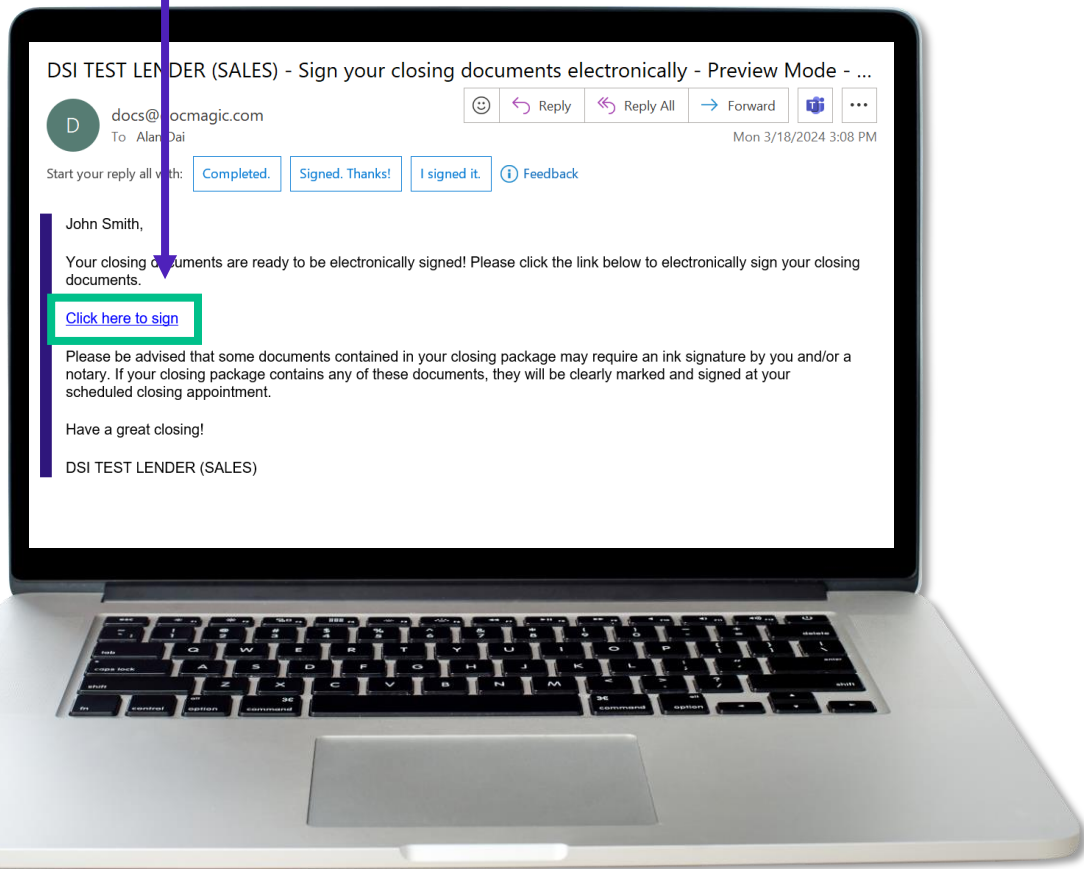




V3 Signing (Borrower's Experience)

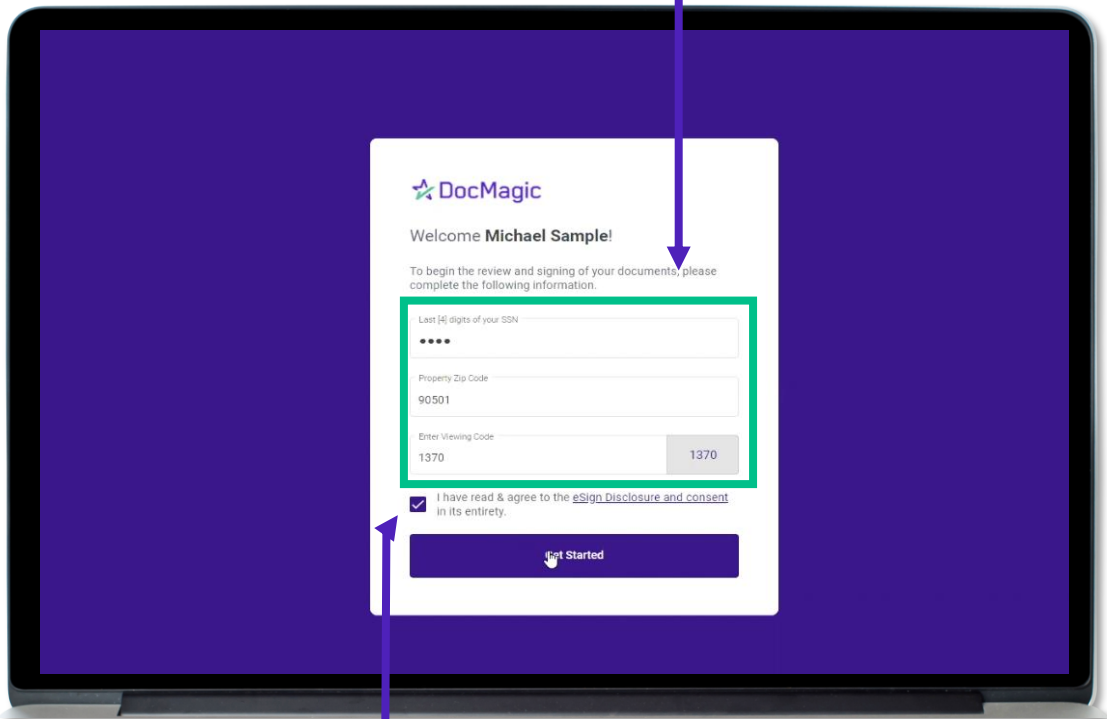
Logging In

When the Settlement Agent processes the closing documents, the borrower will get an email inviting them to access the signing portal for their set of documents.



Logging In - Verification

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



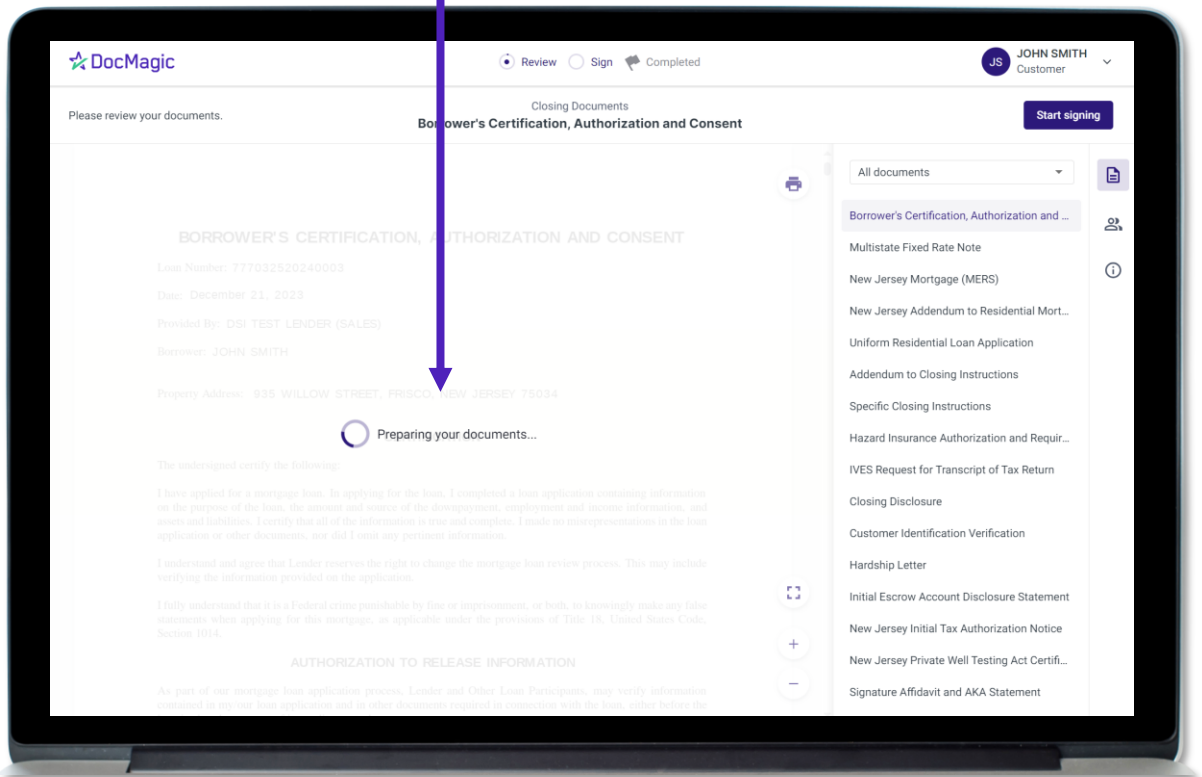
The screenshot shows a laptop displaying the DocMagic login interface. The page has a dark blue background. At the top, the DocMagic logo is visible. Below it, the text reads "Welcome Michael Sample!". A message states: "To begin the review and signing of your documents, please complete the following information." There are three input fields: "Last 4 digits of your SSN" (with four dots), "Property Zip Code" (with "90501" entered), and "Enter Viewing Code" (with "1370" entered and a "1370" button next to it). Below these fields is a checkbox labeled "I have read & agree to the eSign Disclosure and consent in its entirety." which is checked. At the bottom is a "Get Started" button.

The signer must check the eSign Disclosure and Consent box to sign on.



Preparing Your Documents

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

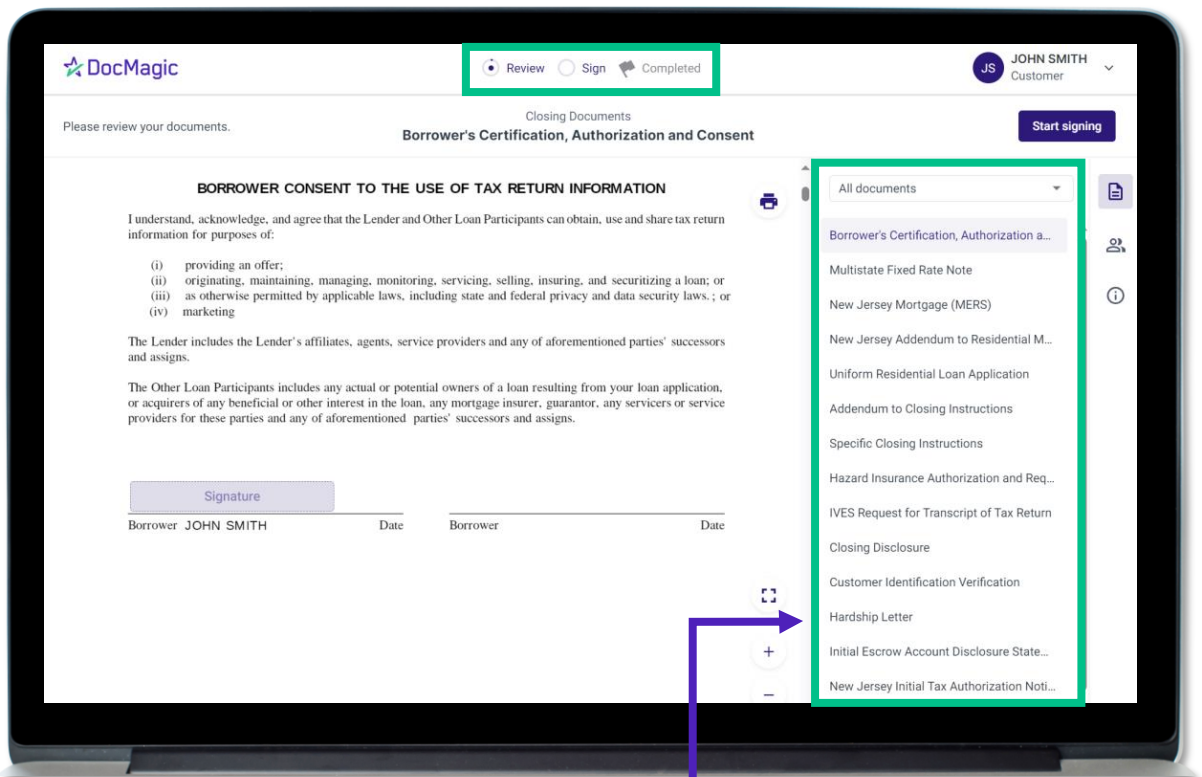


The system will automatically take you to the first document that needs to be signed.



Page Features

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

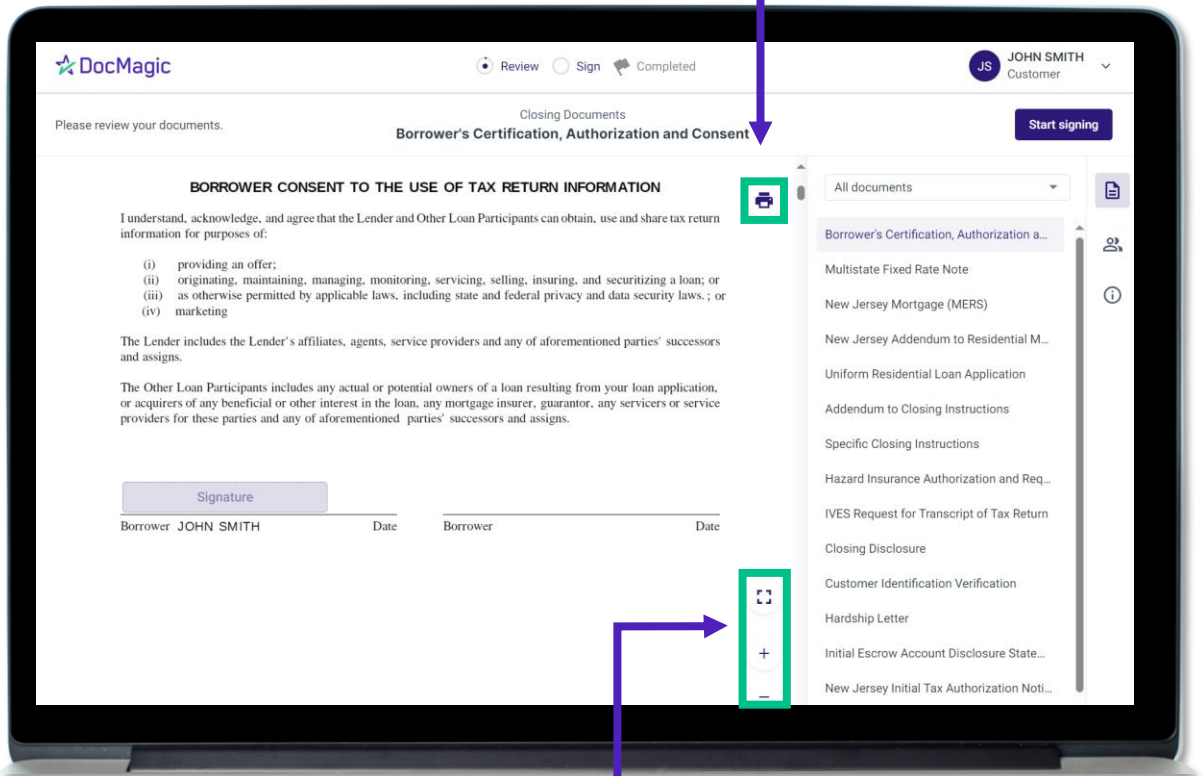


By default, all documents that need to be signed are listed in this column on the right. You can filter this column by documents that need to be ink signed or notarized from the dropdown at the top.



Page Features

The print icon allows you to print the documents.

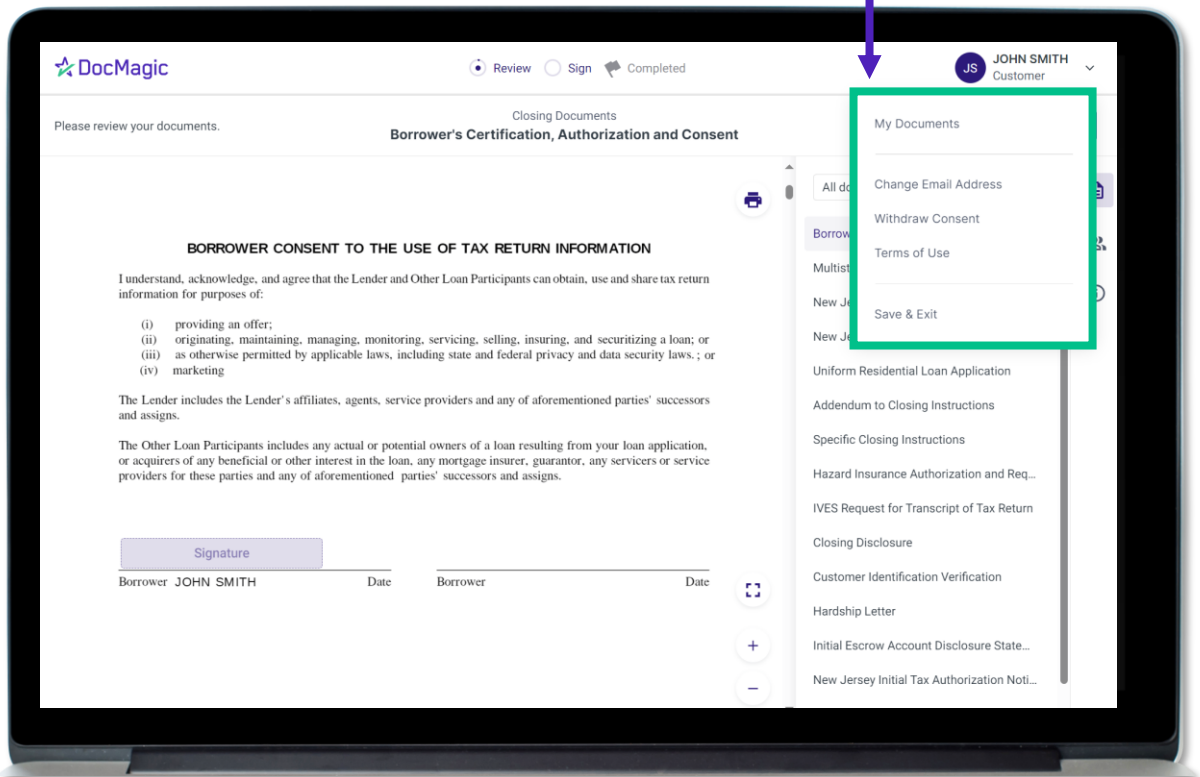


You can expand the signing window and increase or decrease the zoom levels.

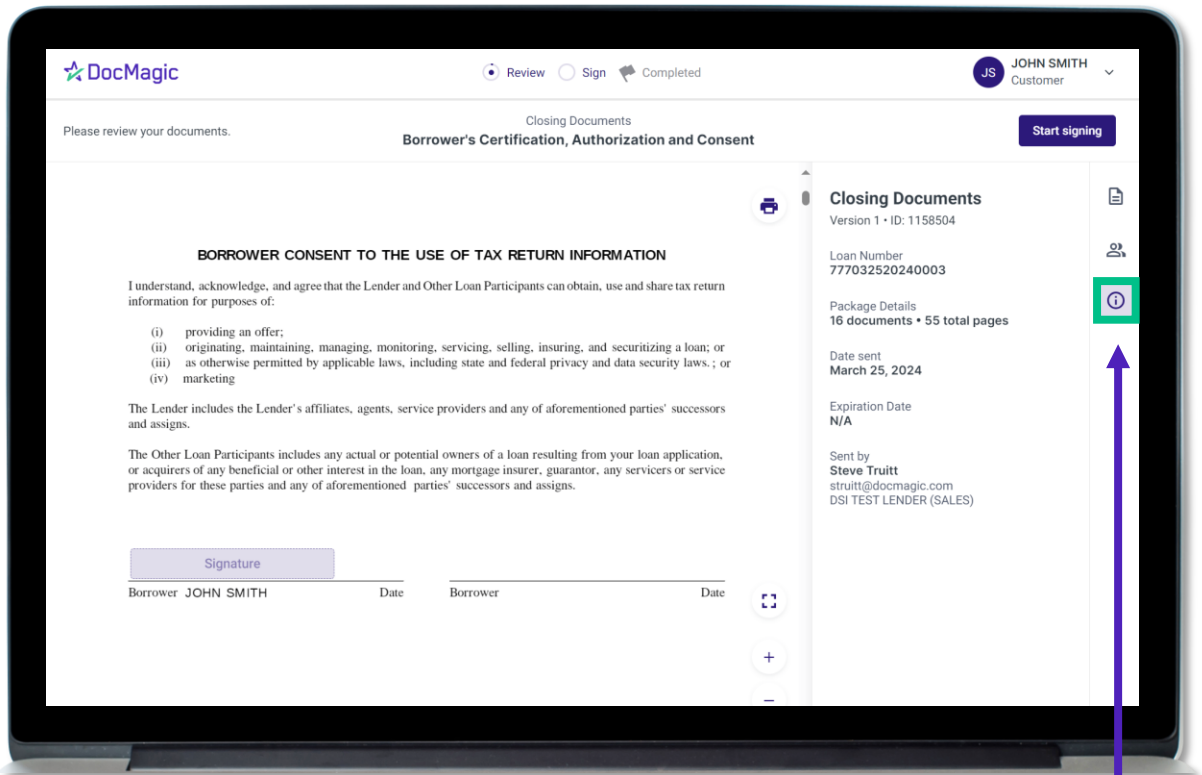


Borrower Information

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



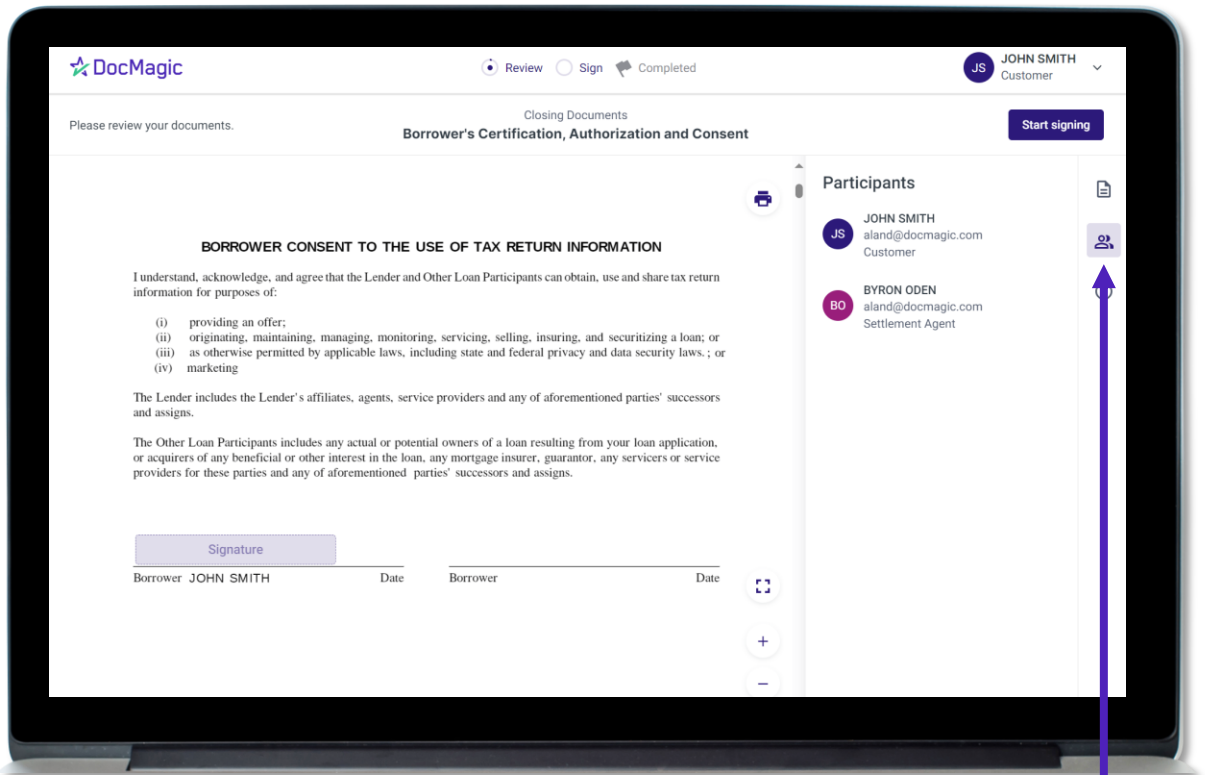
Document Information



Click the information icon to see document package metadata.



Participants

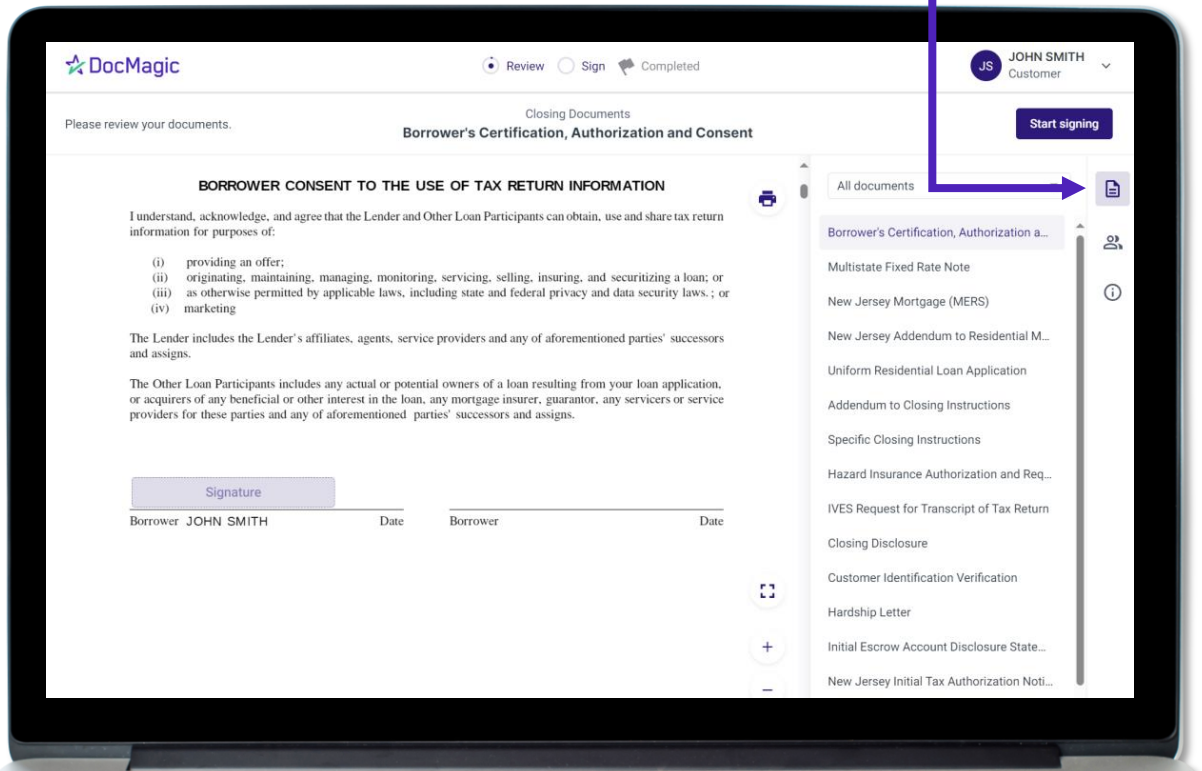


Click here to view participants.



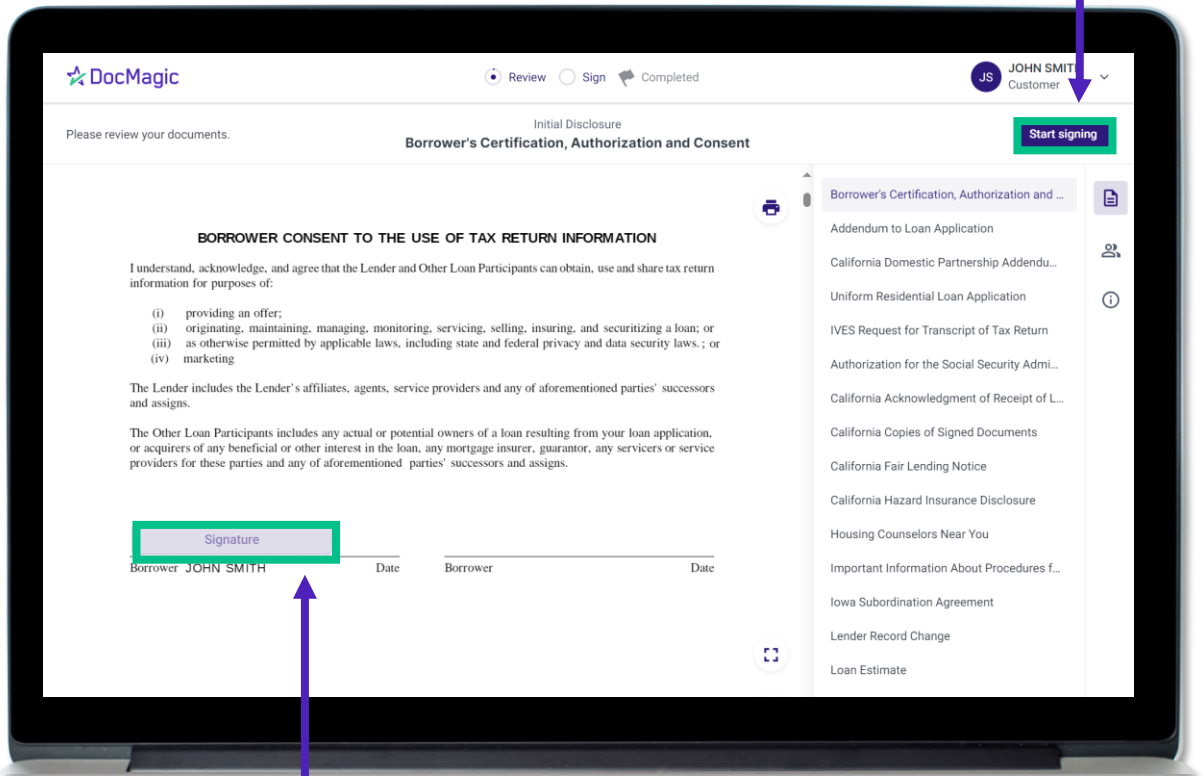
Return to Documents List

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



Start Signing

Click "Start Signing" to begin the signing process.



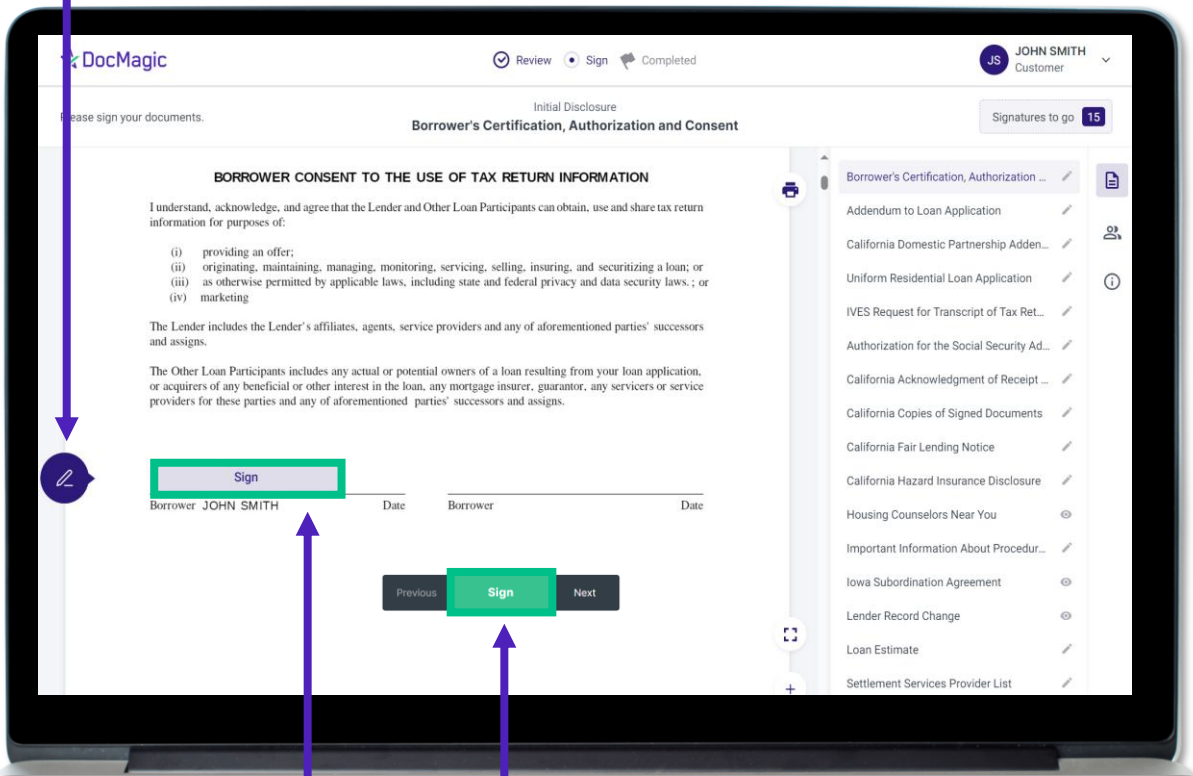
You can't sign anything until you hit the purple button in the top right corner – until then, these will remain greyed out and unclickable.



Begin Click-Signing

There are three options for click-signing.

1. Clicking the pen icon.



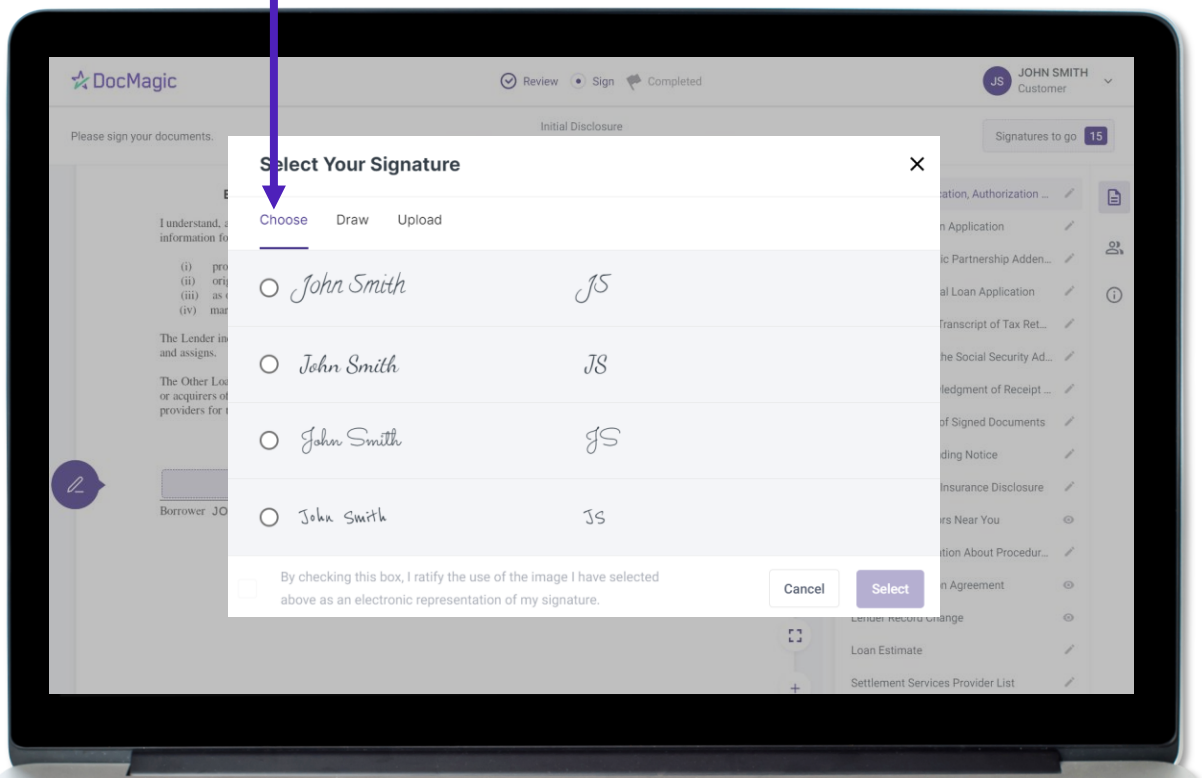
2. Clicking on the "Sign" box directly.

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



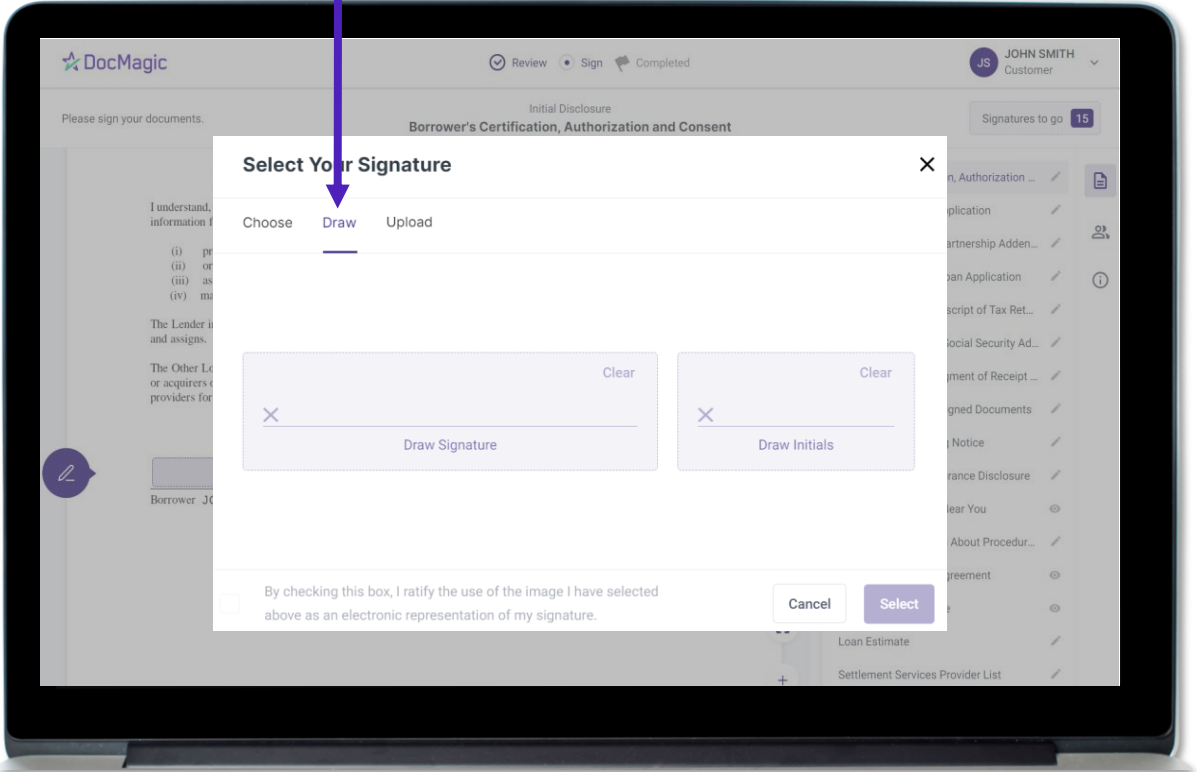
Signature Options

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



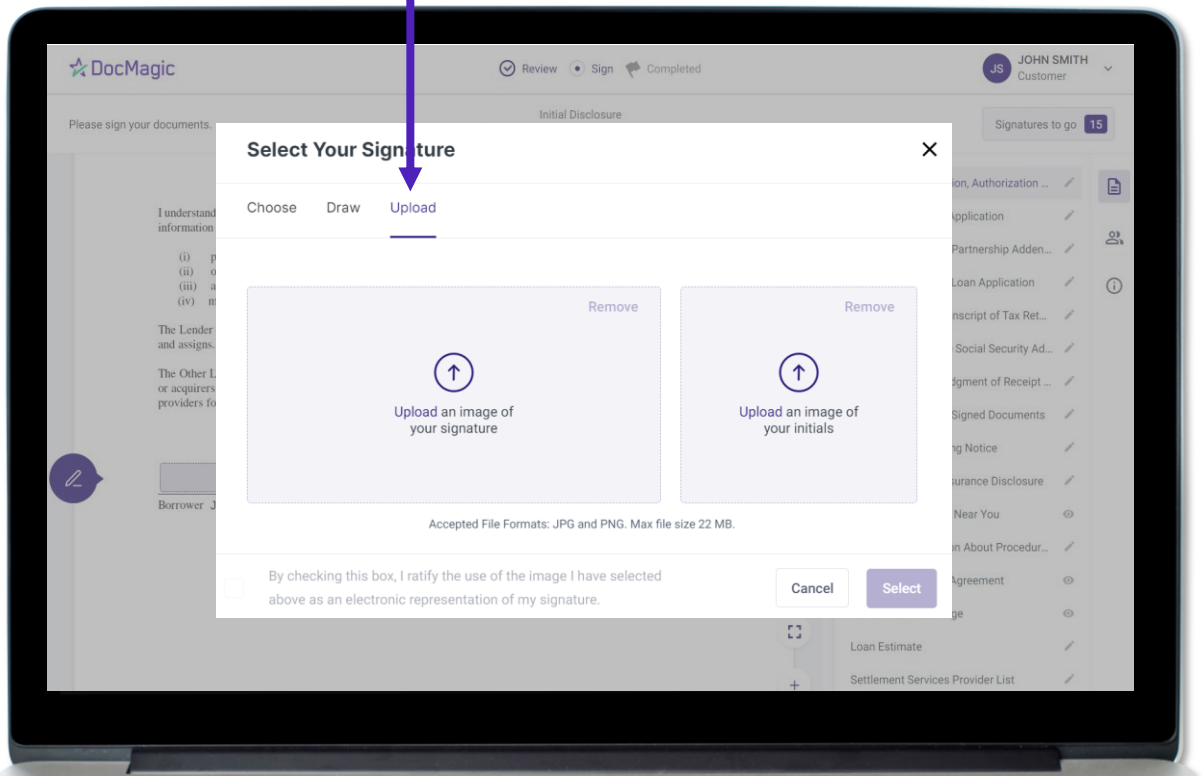
Signature Options

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

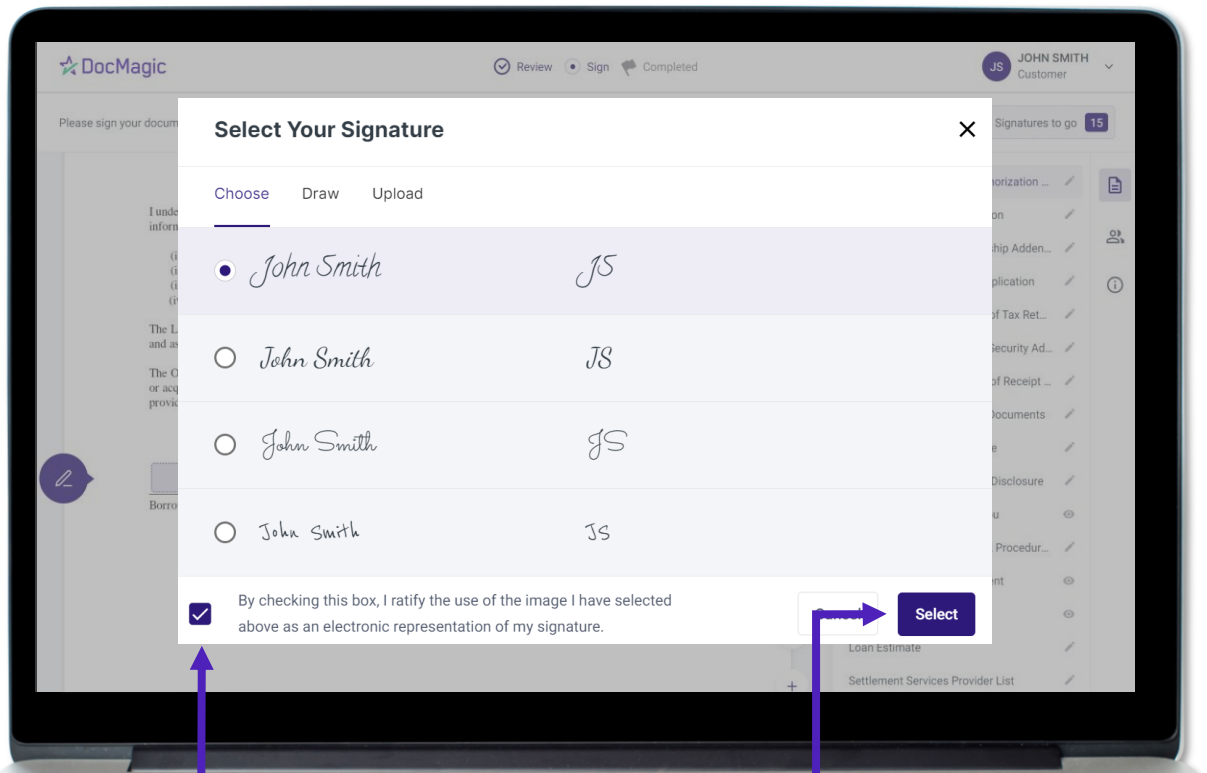


Signature Options

You also have the option to upload a .JPG or .PNG of your own signature from the computer.



Signature Options



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.

DocMagic

Review Sign Completed

JOHN SMITH
Customer

Signatures to go 10

Please sign your documents.

Initial Disclosure
IVES Request for Transcript of Tax Return

LOAN REQUESTOR: **OSI TEST LENDER (SALES)** M. LENDER OR COUNSELOR: **(800) 649-1362**

Street address (including apt., room, or suite no.): **1800 W. 213TH STREET** City: **TORRANCE** State: **CA** ZIP code: **90501**

Caution: This tax transcript is being sent to the third party entered on Line 5a and/or 5d. Ensure that lines 5 through 8 are completed before signing. (See instructions)

Transcript requested: Enter the tax form number here (1040, 1095, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request for line 6 transcript.

1040

Return Transcript Account Transcript Record of Account

Wage and income transcript (W-2, 1099-E, 1099-G, etc.)

Enter a max of three form numbers here; if no entry is made, all forms will be sent.

Mark the checkbox for taxpayer(s) requesting the wage and income transcripts. If no box is checked, transcripts will be provided for all listed taxpayers

Line 1a Line 2a

Year or period requested. Enter the ending date of the tax year or period using the mm dd/yyyy format (see instructions)

12 / 31 / 2022 **12 / 31 / 2021** / /

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or, if applicable, line 2a, or a person authorized to obtain the tax information requested; if the request applies to a joint return, at least one spouse must sign; however, if both spouses' names and TINs are listed in lines 1a-1b and 2a-2b, both spouses must sign the request; if signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-C on behalf of the taxpayer. **Note:** This form must be received by IRS within 120 days of the signature date.

Signatory attests that he/she has read the above attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-C. See instructions.

Sign Here

Signatory for Line 1a (see instructions)

Form 4506-C was signed by an Authorized Representative Signatory confirms document was electronically signed

Print/Type name: **JOHN SMITH** Date: _____ Phone number of taxpayer on line 1a or 2a: **(310) 555-5555**

Title (if line 1a above is a corporation, partnership, estate, or trust): _____

Spouse's signature (required if listed on Line 2a) _____ Date: _____

Form 4506-C was signed by an Authorized Representative Signatory confirms document was electronically signed

Print/Type name: _____

Catalog Number 72627P www.irs.gov Form **4506-C** (Rev. 10-2022)
For Privacy Act and Paperwork Reduction Act

Previous **Check** Next

Borrower's Certification, Authorization ... ✓

Addendum to Loan Application ✓

California Domestic Partnership Adde... ✓

Uniform Residential Loan Application ✓

IVES Request for Transcript of Tax Ret... ✓

Authorization for the Social Security Ad... /

California Acknowledgment of Receipt ... /

California Copies of Signed Documents /

California Fair Lending Notice /

California Hazard Insurance Disclosure /

Housing Counselors Near You

Important Information About Procedur... /

Iowa Subordination Agreement

Lender Record Change

Loan Estimate /

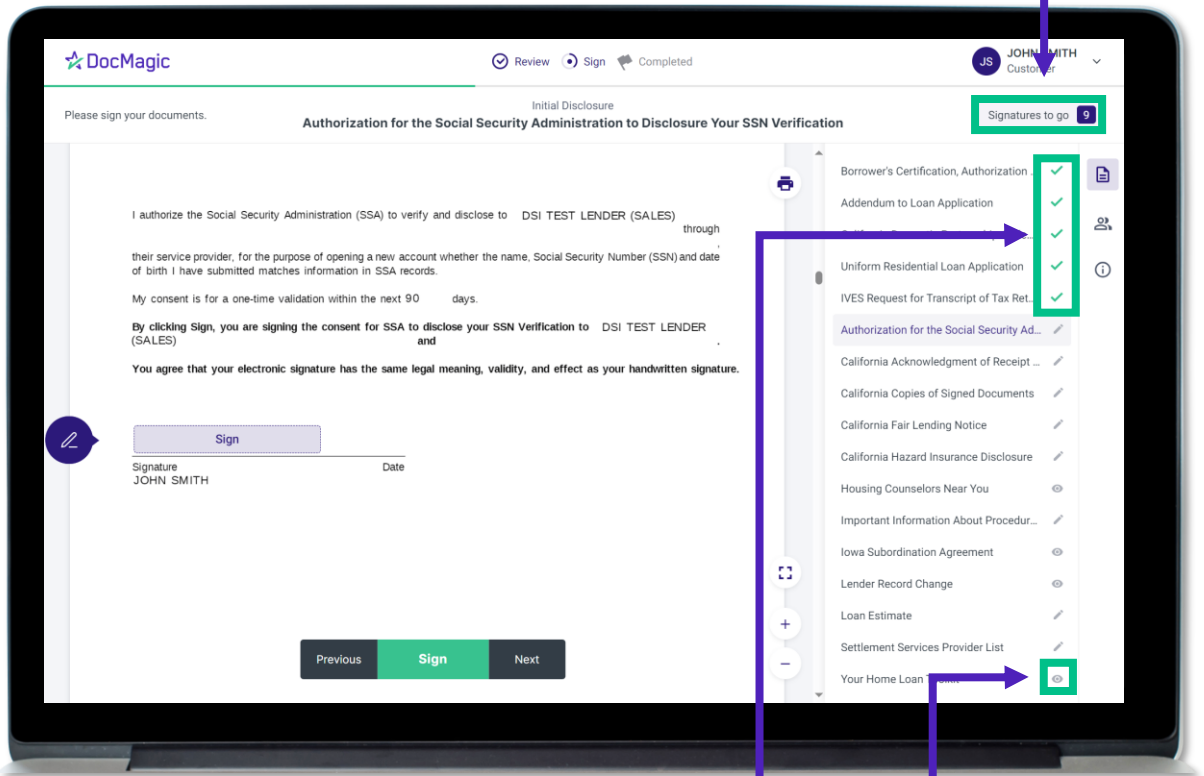
Settlement Services Provider List /

Your Home Loan Toolkit



Keeping Track of Your Progress

The countdown feature shows how many signatures remain.



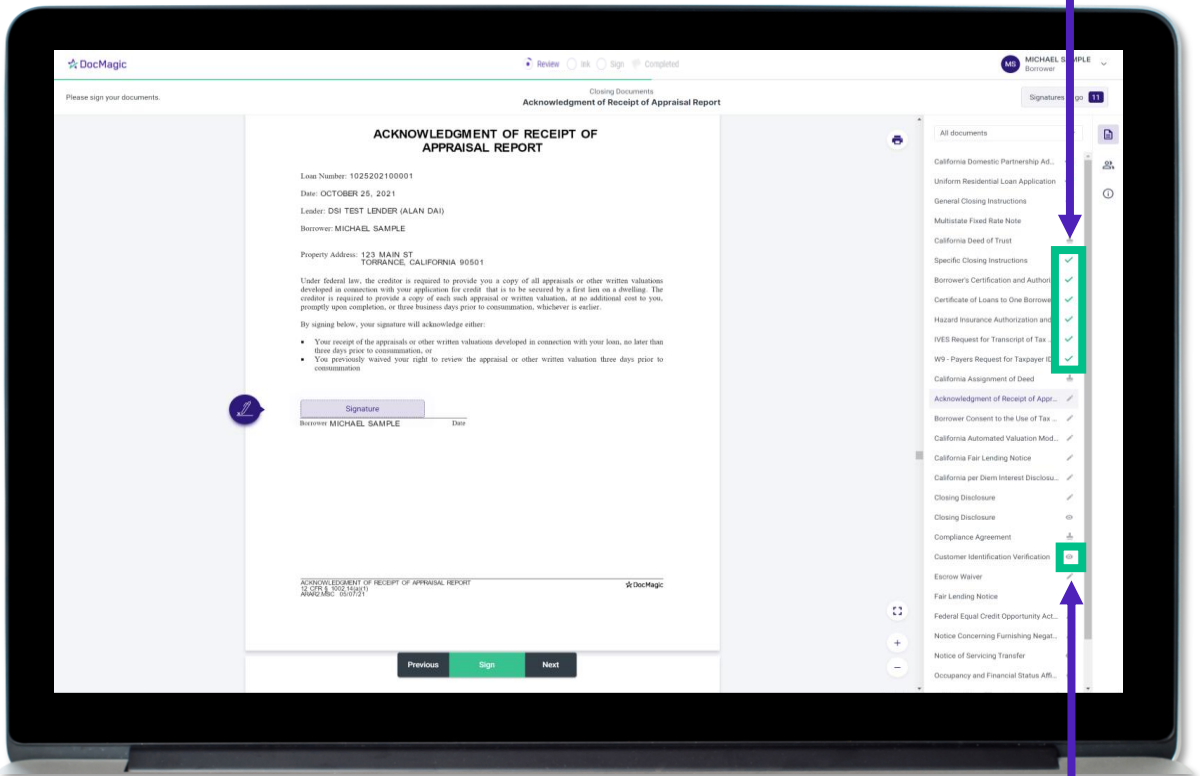
A green check mark next to a document name indicates that it has been signed and completed.

An eyeball indicates that this document does not require a signature.



Keeping Track of Your Progress

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

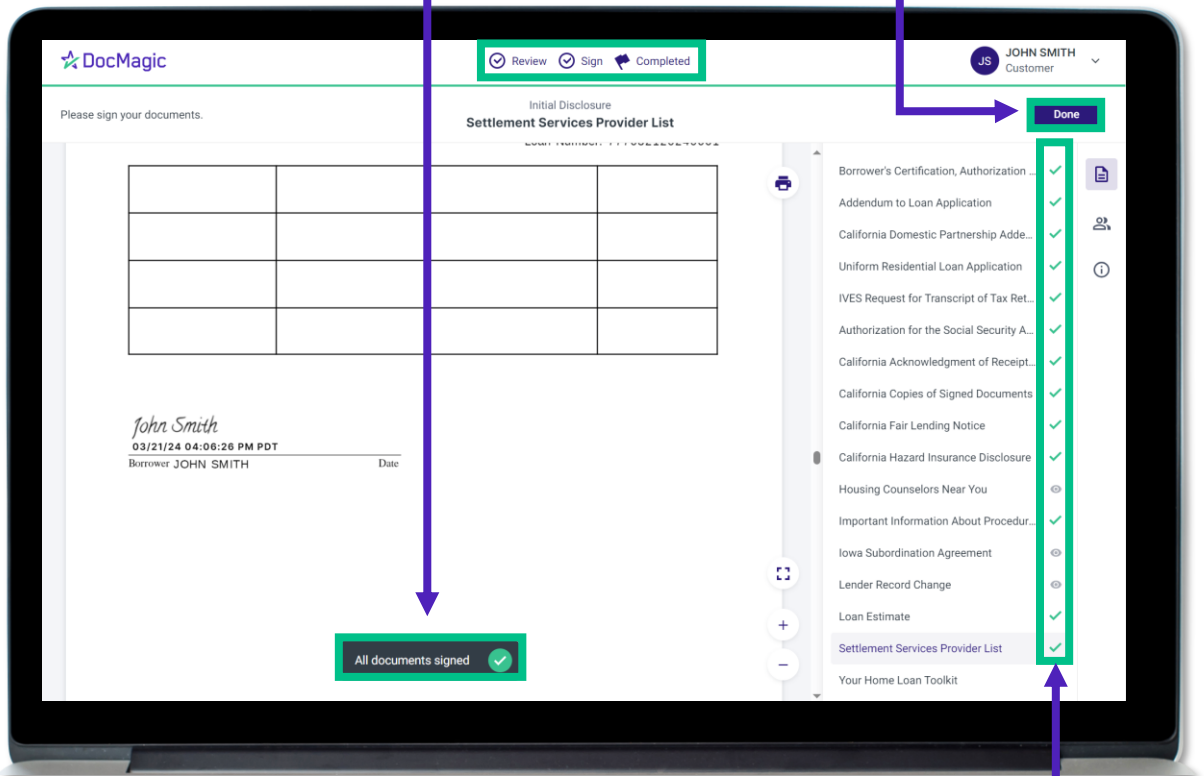


The eyeball icon indicates this is a document that does not require a signature.



When Complete

These icons will indicate when the process is complete.

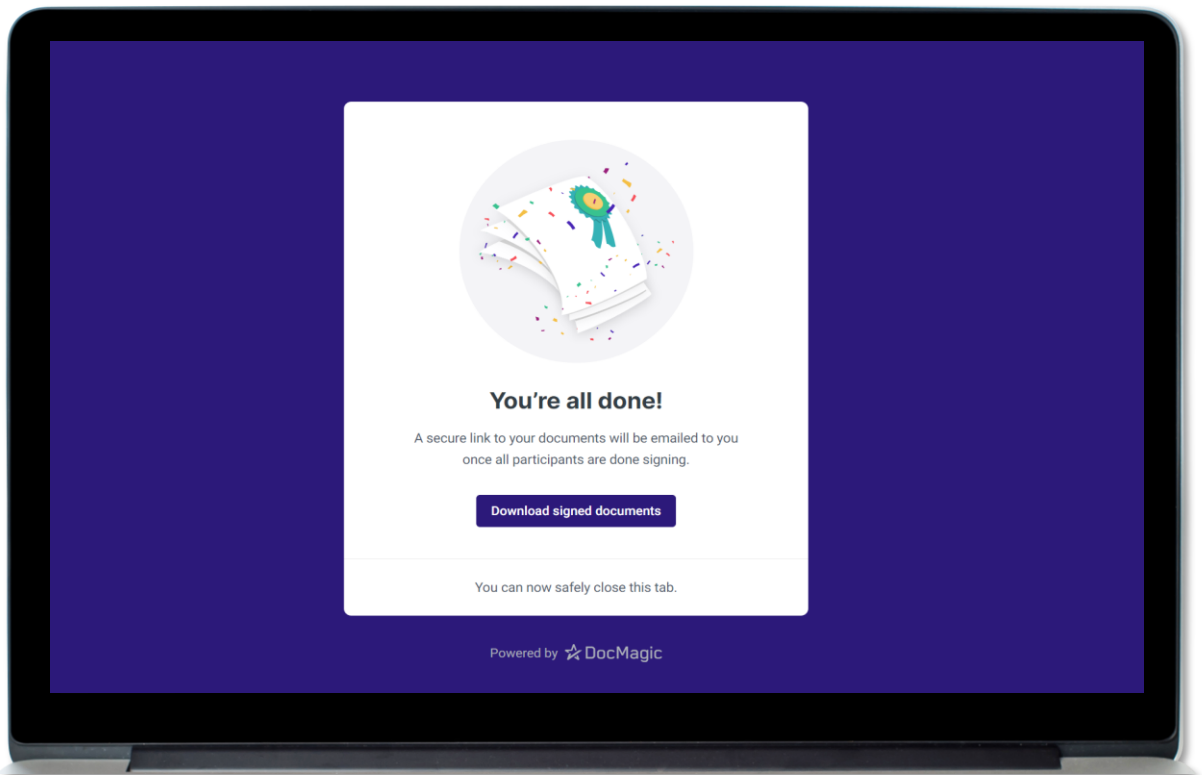


All applicable checkmarks will be green.



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.

The screenshot displays the 'eSign Console - Steve Truitt' interface. At the top, there are navigation tabs: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area is divided into several sections:

- Loan Details:** Loan #: 070620220001, Lender: Steve Truitt (DSI TEST LENDER (SALES) (100SALES)), Status: Signed (Active). Documents: 17 (66 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y (Ink Sign).
- Participants Table:**

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links	Fix
1	John Smith struitt@docmagic.com	Borrower	7/6/22 11:47 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:57 AM		Send Email Sign Documents	4563-C
3	Andy Agent struitt@docmagic.com	Settlement Agent	7/6/22 11:47 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:54 AM		Send Email Agent Portal	
4	Stephen Truitt struitt221@gmail.com	Other	7/6/22 11:52 AM						Send Email	

- Action Log Table:**

Date	User	IP Address	Description
7/6/22 11:47 AM	System User		eSign event created
7/6/22 11:47 AM	John Smith		Invitation sent to struitt@docmagic.com
7/6/22 11:47 AM	Andy Agent		Invitation sent to struitt@docmagic.com
7/6/22 11:51 AM	Steve Truitt		Document batch upload completed
7/6/22 11:52 AM	Steve Truitt		Stephen Truitt (struitt221@gmail.com) added as Other
7/6/22 11:52 AM	Stephen Truitt		Invitation sent to struitt221@gmail.com
7/6/22 11:53 AM	System User		Preview Mode was enabled
7/6/22 11:53 AM	System User		Preview Mode was disabled
7/6/22 11:53 AM	Andy Agent		Consented to DocMagic eSign
7/6/22 11:53 AM	Andy Agent		eSign event started
7/6/22 11:53 AM	Andy Agent		Closing Documents version 1 prepared on July 06, 2022, 11:47 AM PDT displayed
7/6/22 11:54 AM	Andy Agent		Approved electronic representation of signature

At the top right of the console, there is a toolbar with icons for document management, including a PDF icon and a printer icon. A blue arrow points from the text box above to this toolbar, and another blue arrow points from the text box below to the PDF and printer icons.

The lender will also be able to download a PDF (PDF icon) and/or print (printer icon) the signed document stack.





Final Actions & Confirmation

Back to the Settlement Agent Portal

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

The screenshot displays the DocMagic eClose Console for a Settlement Agent. The interface includes a header with the DocMagic logo and the user's name 'Sally'. Below the header, there are sections for LOAN details (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1)), LENDER information (Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362), and a COUNTDOWN TO CLOSING timer (Date: Apr 19, 2023 (Wed), Time: 12:00 PM PDT). A 'Ready to Close' button is visible. Below these sections, there is a 'Signers (2)' section with a table listing the signers. The table has columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. The first signer is Erica Sample (Borrower) with a status of 'Finished'. The second signer is Sally Settlement (Settlement Agent) with a status of 'Ready to Sign'. A red box highlights the 'Open Signing Room' button next to the Settlement Agent's name. Below the signers section, there is a 'Documents (16)' section with a table listing documents. The table has columns for #, eSign Enabled, Page(s), Signer(s), and Completed. The documents listed are: 1. Uniform Residential Loan Application (9 pages, 1 signer, completed), 2. MERS California Deed of Trust (16 pages, 2 signers, completed), 3. Specific Closing Instructions (3 pages, 2 signers, completed), 4. California Hazard Insurance Disclosure (1 page, 1 signer, completed), 5. Hazard Insurance Authorization and Requirements (2 pages, 1 signer, completed), and 6. Borrower Consent to the Use of Tax Return Information (1 page, 1 signer, completed). A 'Preview Mode' toggle is set to 'ON'. The Dell logo is visible at the bottom of the screen.

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉️ ⚙️	📄 ⚙️	● Finished	Open Signing Room
2	Sally Settlement sally.settlement@exempl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

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



eClose Console Confirmation

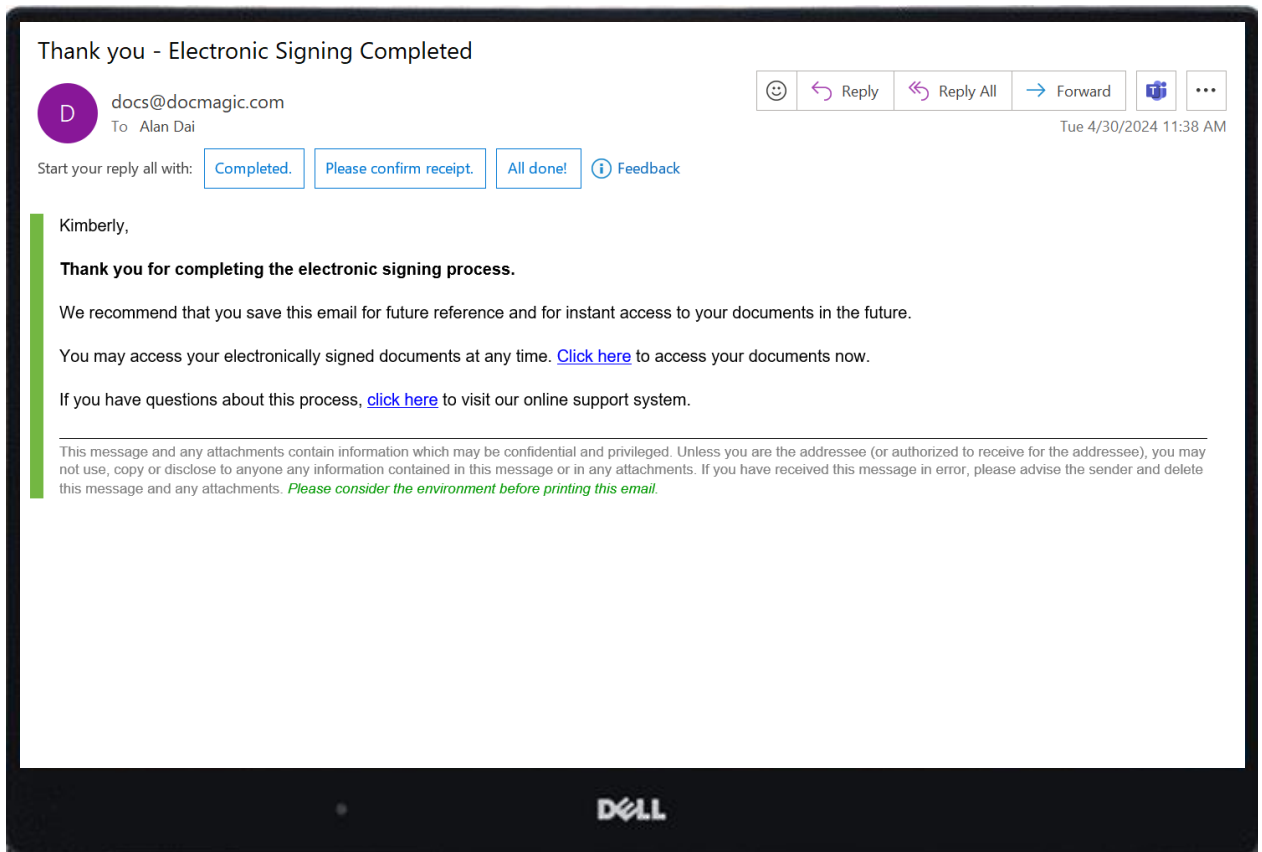
When all signed documents have been uploaded and all signatures and fields are completed, the Settlement Agent will see a fully completed column on the right.

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓
7	California Fair Lending Notice	1	1	✓
8	California Private Mortgage Insurance Notice	2	1	✓
9	Closing Disclosure	5	1	✓
10	IVES Request for Transcript of Tax Return	2	1	✓
11	Initial Amortization Schedule	8	0	✓
12	Initial EscNew Account Disclosure Statement	2	1	✓
13	PMI Initial Disclosure - Fixed	2	1	✓
14	Signature Affidavit and AKA Statement	2	2	✓
15	AZACPRS.TTL.pdf	2	2	✓



Email Confirmation

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



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

