



eClose with AutoPrep – Hybrid 3  
With Settlement Agent Portal and Borrower's Experience

GUIDEBOOK

# Hybrid 3 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 3 eClose Process

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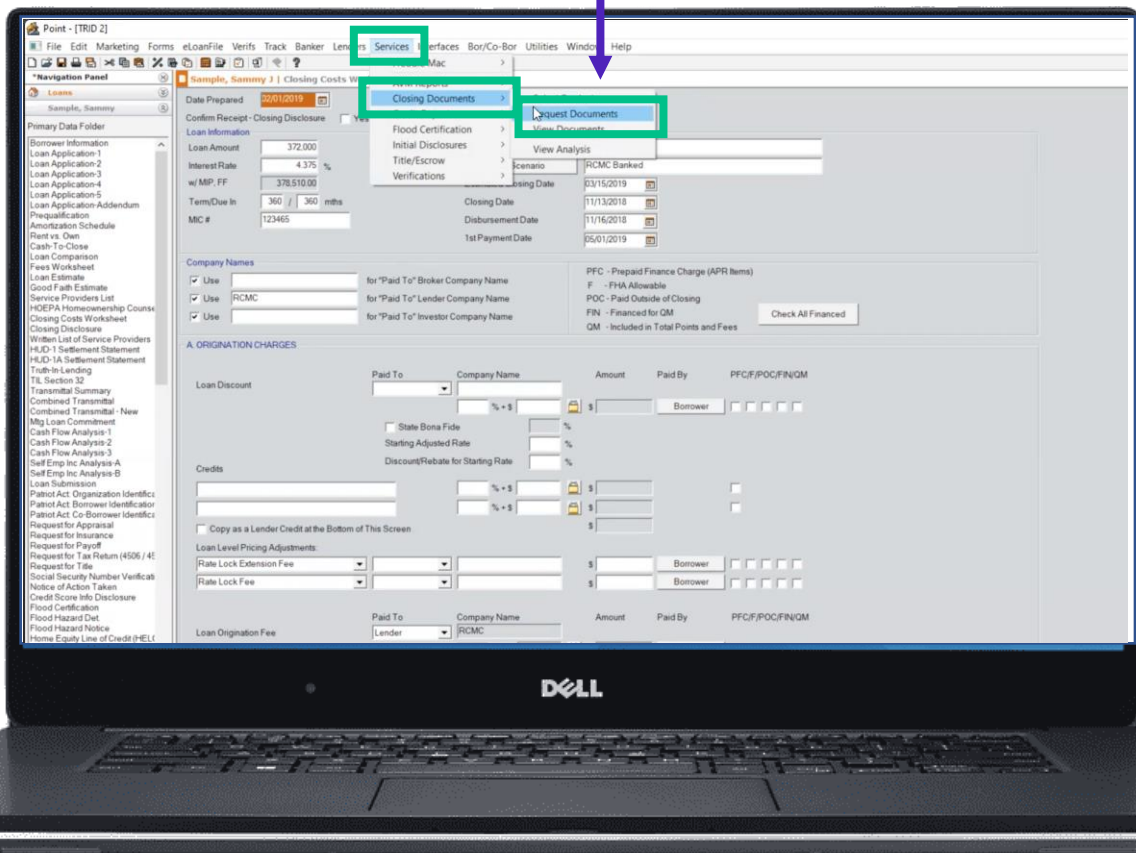




Processing Closing Documents in LOS

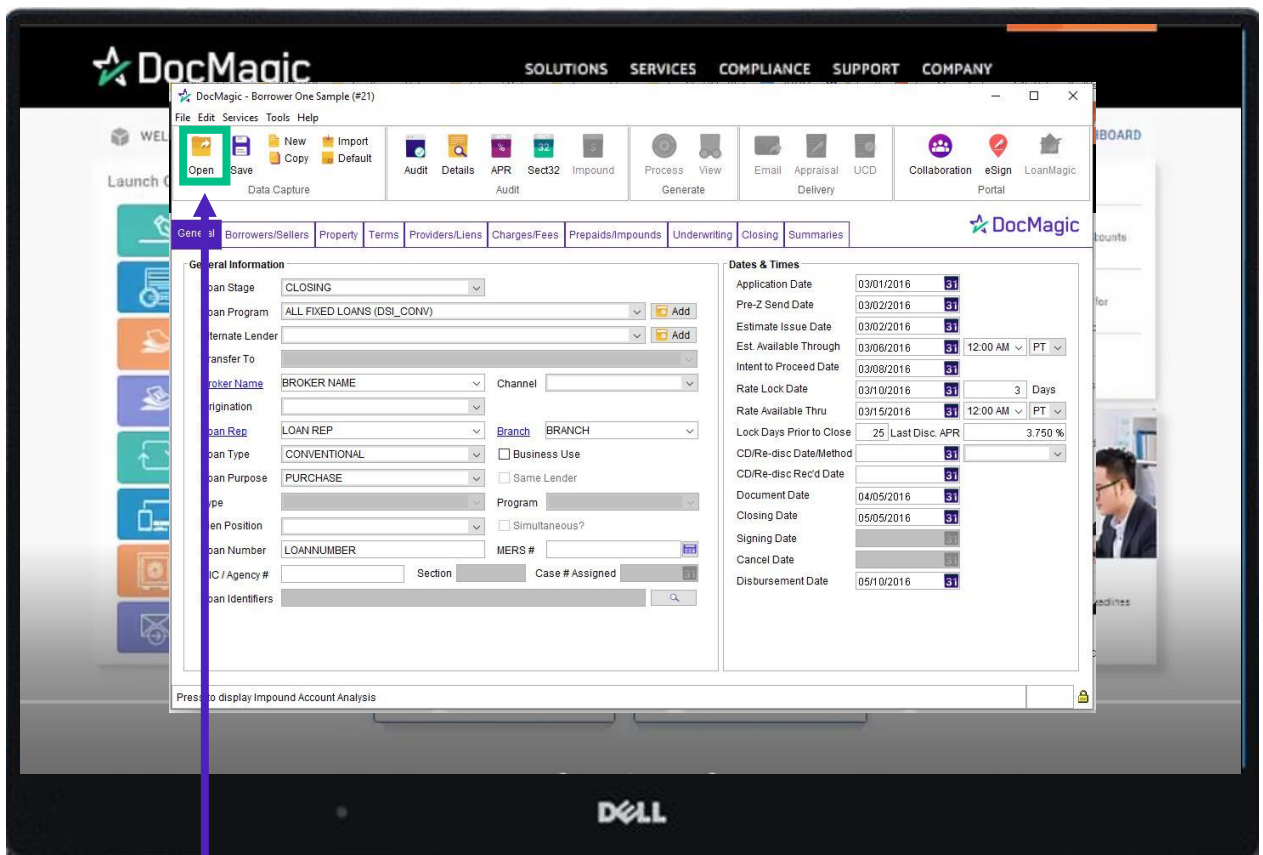
# Closing Documents in Your LOS

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



# Closing Documents in Your LOS

If your LOS does not allow for eNotarization, you will need to re-process the document in DocMagic Online.



Start by opening the file in DMO.



# Closing Documents in Your LOS

Confirm that all Loan Information has been imported into DMO and make any necessary additions and corrections.

The screenshot displays the DocMagic software interface. At the top, there is a navigation bar with the following menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. The main window title is "DocMagic - Borrower One Sample (#21)". Below the title bar is a menu bar with "File", "Edit", "Services", and "Tools", followed by "Help". A toolbar contains various icons for actions like Open, Save, New, Copy, Import, Default, Audit, Details, APR, Sec32, Impound, Process, View, Generate, Email, Appraisal, Delivery, UCD, Collaboration, eSign, and LoanMagic Portal. Below the toolbar is a tabbed interface with the following tabs: General, Borrowers/Sellers, Property, Terms, Providers/Liens, Charges/Fees, Prepays/Impounds, Underwriting, Closing, and Summaries. The "Closing" tab is currently selected. The main content area is divided into two columns: "General Information" and "Dates & Times".

**General Information**

- Loan Stage: CLOSING
- Loan Program: ALL FIXED LOANS (DSL\_CONV)
- Alternate Lender: [Empty]
- Transfer To: [Empty]
- Broker Name: BROKER NAME
- Channel: [Empty]
- Origination: [Empty]
- Loan Rep: LOAN REP
- Branch: BRANCH
- Loan Type: CONVENTIONAL
- Business Use:
- Loan Purpose: PURCHASE
- Same Lender:
- Type: [Empty]
- Program: [Empty]
- Lien Position: [Empty]
- Simultaneous?:
- Loan Number: LOANNUMBER
- MERS #: [Empty]
- MIC / Agency #: [Empty]
- Section: [Empty]
- Case # Assigned: [Empty]
- Loan Identifiers: [Empty]

**Dates & Times**

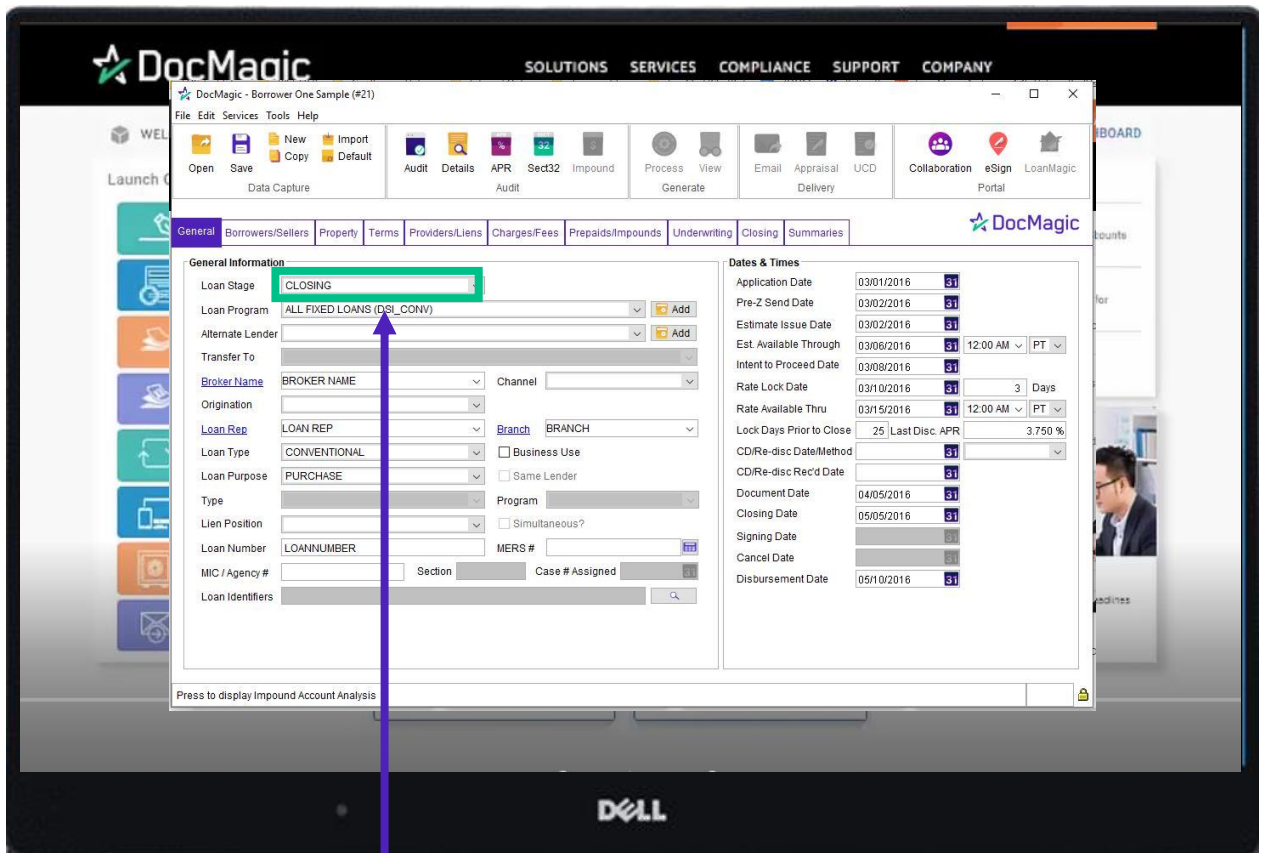
- Application Date: 03/01/2016
- Pre-Z Send Date: 03/02/2016
- Estimate Issue Date: 03/02/2016
- Est. Available Through: 03/06/2016 12:00 AM PT
- Intent to Proceed Date: 03/08/2016
- Rate Lock Date: 03/10/2016 3 Days
- Rate Available Thru: 03/15/2016 12:00 AM PT
- Lock Days Prior to Close: 25 Last Disc APR 3.750%
- CD/Re-disc Date/Method: [Empty]
- CD/Re-disc Rec'd Date: [Empty]
- Document Date: 04/05/2016
- Closing Date: 05/05/2016
- Signing Date: [Empty]
- Cancel Date: [Empty]
- Disbursement Date: 05/10/2016

At the bottom of the window, there is a status bar that says "Press to display impound Account Analysis".



# Closing Documents in Your LOS

If using DocMagic Online, enter your loan information manually.



For all document sets, choose Closing from Loan Stage here.





# Loan Detail Report

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

The screenshot shows the DocMagic software interface. At the top, there is a menu bar with 'File', 'Edit', 'Services', 'Tools', and 'Help'. Below the menu bar, there are several icons for 'Audit', 'Process', 'Details', 'APR', 'High Cost', 'Impounds', and 'Print'. The 'Details' icon is highlighted with a green box, and a blue arrow points to it from the text above. Below the icons, there is a warning message: '8 Warning issues have been detected.' The main content area is titled 'Loan Detail Report' and contains 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

Below this information, there are three tabs: 'Transaction Details', 'Data Validation', and 'Compliance Audit'. The 'DETAILS' section is expanded, showing the following information:

<b>LENDER INFO</b>					
Lender Name:	DSI TEST LENDER (SALES)	Transfer To:			
Loan Program:	ALL FIXED LOANS (DSI_CONV)				
<b>LOAN IDENTIFIERS</b>					
Loan Number:	777012520220001	FHAVA Case:		MERS #:	9999353-2520220001-4
Loan Purpose:	Purchase	Loan Type:	Conventional	Origination Type:	Lender
FHA Section:		MIC #:			
Loan Rep:		Broker Name:		Branch:	
<b>IMPORTANT DATES</b>					



# Processing Documents – Hybrid 3

Process the Document set.

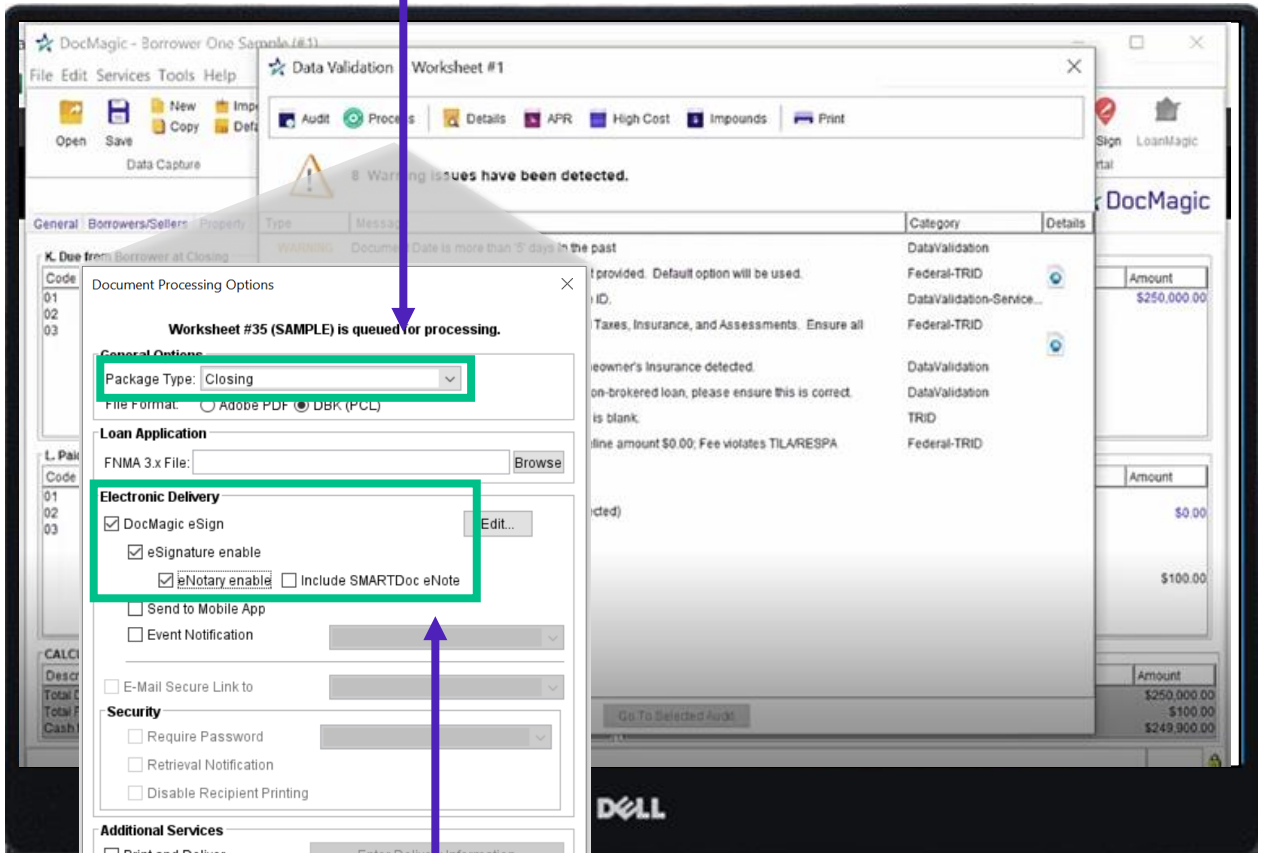
The screenshot shows the DocMagic software interface. A window titled 'Data Validation - Worksheet #1' is open, displaying a table of warning issues. The 'Process' button in the toolbar is highlighted with a green box. A blue arrow points from the text 'Process the Document set.' to this button. The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

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)		



# Processing Documents – Hybrid 3

Choose "Closing" for Package Type.



Select these boxes for a Hybrid 3 closing.

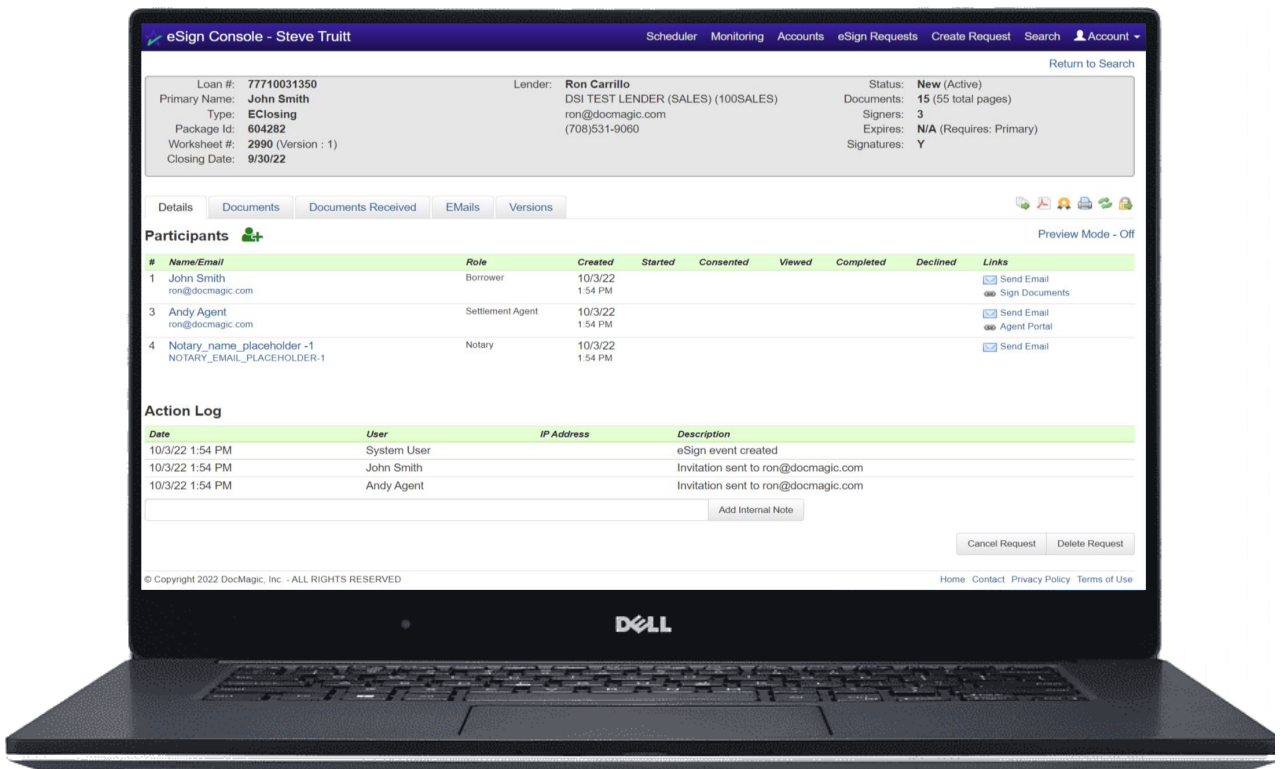




Lender Portal

# 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.

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. Below this is a summary section for a loan with the following details:

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

Below the summary is a 'Documents' tab, which is highlighted. The 'Documents' section contains a table with the following columns: Document Name, ClickSign, Page(s), Mark(s), Signer(s), Completed, Sigreq, Document Id | Document Id, Filename, Delete, and Operation.

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

At the bottom of the interface, there is an 'Add Internal Note' button. The Dell logo is visible at the bottom center of the screen.

You can check the status of the signature process here.





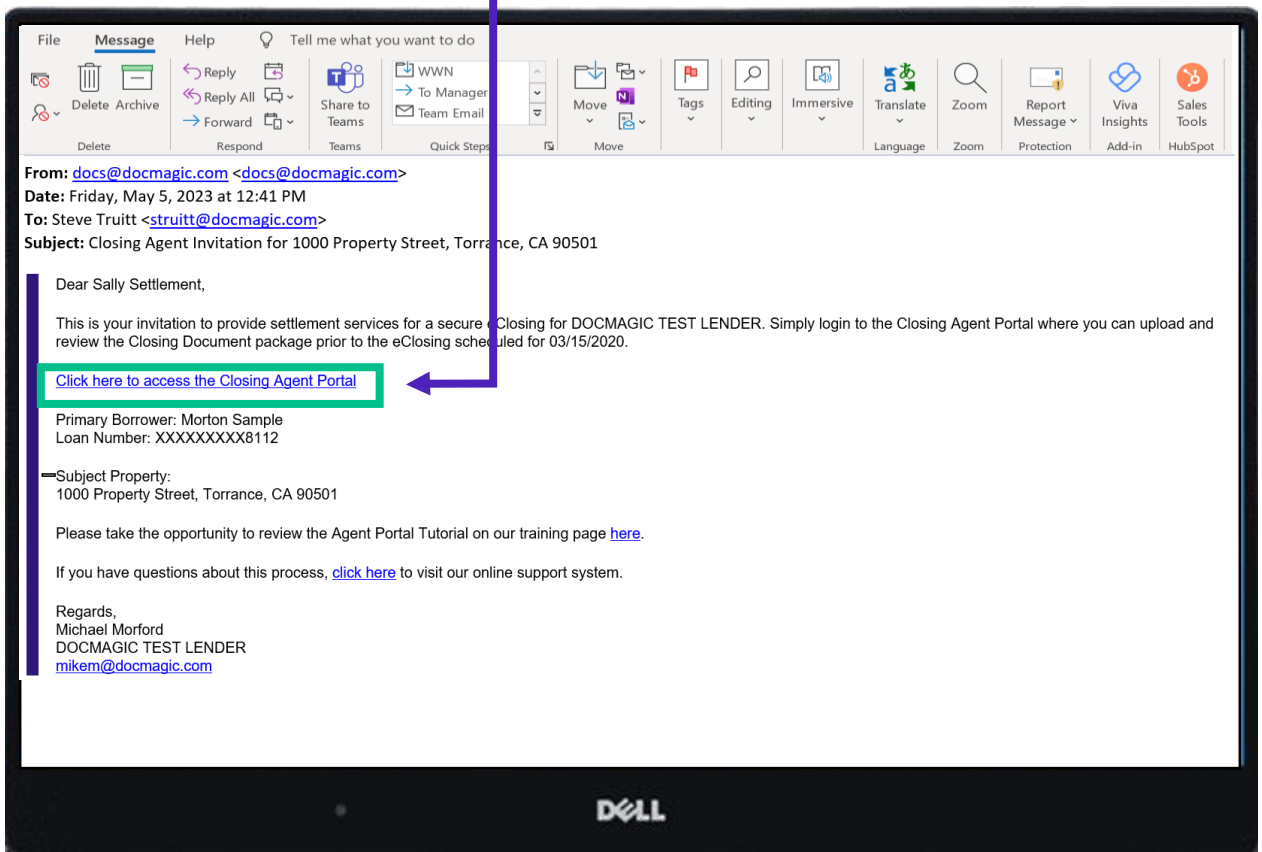
Settlement Agent Process



# Settlement Agent Invitation Email

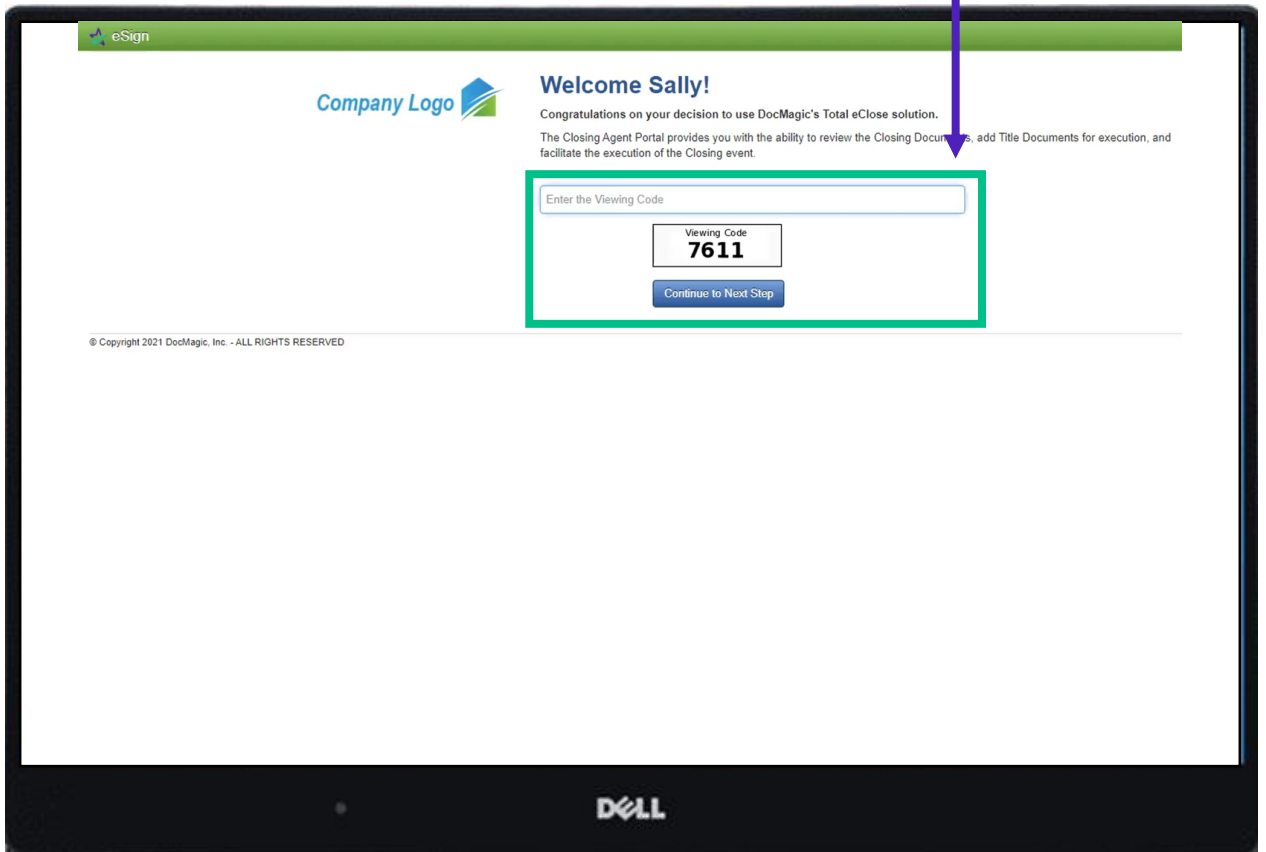
The Settlement Agent will receive an invitation email when the lender creates the eClose event.

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.
- Signers (2):** A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are listed, all with a checkmark in the Completed column.

#	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.

The Edit button at the bottom right of the Countdown Clock allows you to edit the closing time for all participants.



**DocMagic eClose Console (Settlement Agent)** Sally ▾

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

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

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

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

**Signers (2)** [Assign Notary](#)

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

**Documents (15)** [Preview Mode](#)

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

DELL



# Help Button

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

**DocMagic eClose Console (Settlement Agent)**

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

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

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

**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). The 'Details' tab is selected in the navigation bar. The 'Signers (2)' section is highlighted with a green box and contains the following table:

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

Below the signers table, there's a 'Documents (15)' section with a table showing document details:

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



# Signer's Details

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

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

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

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

In the background, the "Signers (2)" list is visible, with "Erica Sample" highlighted. The "Documents (15)" list includes items such as "Uniform Residential Loan Application", "MERS California Deed of Trust", and "Borrower Consent to the Use of Tax Return Information".



# 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 modal window titled "Add Participant" is open, allowing the user to enter the following information:

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

Buttons for "Cancel" and "Add" are at the bottom of the modal. The "Add" button is highlighted with a green box. In the background, the "Signers (2)" list shows two participants: Erica Sample and Sally Settlement. Below that, the "Documents (15)" table lists various documents with their respective counts and completion status.

#	eSign Enabled	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.





# Notary - Signer's Tab

Depending on the Notary provider, identity validation techniques like KBA & ID Verify will be enabled.

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'. 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.
- Signers (2):** A table with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing documents such as 'Uniform Residential Loan Application', 'MERS California Deed of Trust', and 'California Hazard Insurance Disclosure'.

#	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	✓



# Notary - Signer's Tab

The Notary information is in "place-holder" mode until the notary accepts their invitation.

**DocMagic eClose Console (Settlement Agent)** Sally ▾

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

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

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

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

**Signers (2)** [Assign Notary](#)

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

**Documents (15)** [Preview Mode](#)

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

**DELL**



# Notary - Signer's Tab

The closing date and time is listed here. You can edit this right in the window, or in the Assign Notary pop-up.

**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: DOSI TEST LENDER (SALES)  
Contact: Michael Morford  
Email: mmikem@docmagic.com  
Phone: (800) 649-1362

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

Ready to Close

Signers (2) [Assign Notary](#)

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

Documents (15) [Preview Mode](#)  ON

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

DELL



# 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'. 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.
- 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, and Status. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are listed, all with 'Completed' status.

A 'Preview Mode' toggle is located in the bottom right corner of the interface, highlighted with a green box and set to 'ON'. A blue arrow points from the text box above to this toggle.



# Documents Section

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

**DocMagic eClose Console (Settlement Agent)** Sally ▾

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

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

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

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

**Signers (2)** [Assign Notary](#)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / 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	<a href="#">Open Signing Room</a>
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	<a href="#">Open Signing Room</a>

**Documents (15)** [Print](#) [Edit](#) [Share](#) [Refresh](#) [Close](#) 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



# 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)**

#	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. The header includes the DocMagic logo, the text "eClose Console (Settlement Agent)", and a user profile for "Sally". The main content area displays a list of 14 documents with columns for document number, name, page count, number of signers, and completion status. A green box highlights the "Print and Sign" section at the bottom, which contains one document: "Multistate Fixed Rate Note" (3/3 pages, 1 signer, completed).

#	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	✓
<b># Print and Sign</b>				
1	Multistate Fixed Rate Note	3/3	1	✓

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Home Contact Privacy Policy Terms of Use

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'. The main content area is divided into several sections:

- LOAN** section: Displays loan details such as Loan # (777-1616630796081), Primary Borrower (Erica Sample), Type (EClosing), Package ID (333727), and Worksheet # (1616630796081 (Version: 1)).
- LENDER** section: Displays lender information including Company (DSI TEST LENDER (SALES)), Contact (Michael Morford), Email (mikem@docmagic.com), and Phone ((800) 649-1362).
- COUNTDOWN TO CLOSING** section: Shows a timer for days, hours, minutes, and seconds, with a date of Apr 19, 2023 (Wed) and time of 12:00am PDT.
- Signers (2)** section: 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)** section: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. A document icon button is highlighted with a green box and a blue arrow pointing to it from the text above.

#	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 (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1)) and lender information (Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362). A 'COUNTDOWN TO CLOSING' widget shows 0 days, 0 hours, 0 minutes, and 0 seconds. A 'Ready to Close' button is visible. A file selection dialog box is open, showing the 'Desktop' location. The file 'AZACPRS.TTL.pdf' is selected. A 'Browse' button is highlighted with a green box, and a blue arrow points from the text box above to this button. Below the dialog box, a table of documents is visible, including 'California Hazard Insurance Disclosure', 'Hazard Insurance Authorization and Requirements', and 'Borrower Consent to the Use of Tax Return Information'.

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.

The screenshot displays the DocMagic eClose Console (Settlement Agent) interface. 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 two signers: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing 15 documents, including "Uniform Residential Loan Application", "MERS California Deed of Trust", "Specific Closing Instructions", "California Hazard Insurance Disclosure", "Hazard Insurance Authorization and Requirements", and "Borrower Consent to the Use of Tax Return Information".

The "Documents (15)" section is highlighted with a green border. The table below shows the details of these documents:

#	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 #: 16364816201  
Primary Borrower: John Smith  
Type: eClosing  
Package ID: 417659  
Worksheet #: 16364816201

**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)** [Pencil Icon] [Print Icon] [Share Icon]

#	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 the purpose 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** [Pencil Icon]  
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



# eJournal

Click on this tab to access the eJournal.

DocMagic eClose Console (Settlement Agent) Byron

**LOAN** Loan #: 163648191601  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 163648191601 (...)

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

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: strutt@docmagic.c...  
Phone: (987) 555-4321

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

Details **eJournal** Action Log

**Journal**

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

**Recordings**

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

Click on the down arrow to look at the borrower's journal.  
Note: the eJournal is **read-only** for the Settlement Agent.



# Action Log

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

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 role 'Settlement Agent', and the user name 'Sally'. The main content area is divided into several sections:

- LOAN**: Loan #: 777-16166307990, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER**: Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING**: A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Signers (2)**: A table 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', and 'Borrower Consent to the Use of Tax Return Information'.

A green box highlights the printer icon in the document toolbar, and a blue arrow points from the explanatory text above to this icon. Another blue arrow points from the printer icon to the explanatory 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. A callout box on the right provides instructions for document upload. The callout box is titled 'IMPORTANT' and contains the text: '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.' Below this, the 'INSTRUCTIONS' section lists three steps: 1. Print this document, 2. Carefully review and sign each document, and 3. Return the document. Step 3 includes sub-instructions for using the LoanMagic App, the eSign website, or a fax machine. At the bottom of the callout box, a QR code is shown with the text '75605744-1' below it. A blue arrow points from the 'Upload' icon in the interface to the QR code.

**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

Loan 777435612  
Pages 25  
From STEVE SAMPLE

75605744-1

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 with columns for document number, name, page count, number of signers, and completion status. A green box highlights the bottom row, 'Multistate Fixed Rate Note', which is marked as completed with a green checkmark. A blue arrow points from the text box above to this row.

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





# Assign a Notary

Click this button to start the process of assigning a notary. A separate window will appear.

The screenshot displays the DocMagic eClose Console interface. A modal window titled "Assign / Notify Notary" is open, allowing a user to assign a notary to a loan. The modal includes the following sections:

- Notary Provider:** A dropdown menu with "Select" as the current option.
- Notary Type:** Radio buttons for "In Person" and "Remote Online Notary (RON)".
- Signers:** A table listing the signers for the loan.
- Request Summary:** A summary of the closing request, including the closing date and time.
- Buttons:** "Cancel" and "Assign Notary" buttons at the bottom.

The background interface shows a loan summary for "LOAN" with details like "Primary Borrower", "Type", "Package ID", and "Worksheet #". It also lists "Signers (2)" and "Documents (16)".

Name	Email	Role	Phone
JOHN SMITH	aland@docmagic.com	Borrower	Home: (502) 767-8509 Mobile: (562) 652-2578

**Request Summary**

1 participants for a In Person eClosing for a property in Sample, NJ.

\*Estimate Closing Date: 2/14/2023 \*Time: 12:00 AM America/Los Angeles



# Assign a Notary

If your Notary Provider is World Wide Notary, select WWN here.

The screenshot displays the DocMagic eClose Console interface. A modal window titled "Assign / Notify Notary" is open, showing the following details:

- Notary Provider:** WWN (highlighted with a green box)
- Notary Type:** In Person (selected with a radio button, highlighted with a green box)
- Signers:** A table with 2 signers:

#	Name	Email	Role	Phone
1	JOHN SMITH	aland@docmagic.com	Borrower	Home: (502) 767-8509 Mobile: (562) 652-2578
- Request Summary:** 1 participants for a In Person eClosing for a property in Sample, NJ.  
\*Estimate Closing Date: 2/14/2023 \*Time: [ ] AM America/Los Angeles

Buttons for "Cancel" and "Assign Notary" are visible at the bottom of the modal. The background shows a sidebar with "Signers (2)" and "Documents (16)" lists, and a top navigation bar with "DocMagic eClose Console (Settlement Agent)" and a user profile "Sally".

For WWN, you must select "In Person" for Notary Type.



# Assign a Notary

Set the closing date and time.

DocMagic eClose Console (Settlement Agent) Sally

**Assign / Notify Notary**

**\*Notary Provider**  
WWN

**\*Notary Type** *\*Required*  
 In Person  
 Remote Online Notary (RON)

**Signers**

Name	Email	Role	Phone
JOHN SMITH	aland@docmagic.com	Borrower	Home: (502) 767-8509 Mobile: (562) 652-2578

**Request Summary**

1 participants for a In Person eClosing for a property in Sample, NJ.

\*Estimate Closing Date: 2/14/2023 \*Time: 12:00 AM America/Los Angeles

Cancel Assign Notary

Click "Assign Notary" when done.



# Assign a Notary

If your Notary Provider is NotaryCam, choose Remote Online Notary for Notary Type.

The screenshot displays the DocMagic eClose Console interface. A modal window titled "Assign / Notify Notary" is open, showing the following details:

- Notary Provider:** NotaryCam
- Notary Type:** Remote Online Notary (selected)
- Signers (2):**

#	Signer Name / Email	Name	Email	Role	Phone
1	Erica Sample erica.sample@exam...	Erica Sample	erica.sample@exam...	Borrower	Home: (800) 649-1362
2	Sally Settlement sally.settlement@ex...				
- Request Summary:** 1 participants for a RON eClosing for a property in Torrance, CA.
  - Estimate Closing Date:** 3/25/2021
  - Time:** 12:00 AM
  - Location:** America/Los Angeles

Buttons for "Cancel" and "Assign Notary" are visible at the bottom of the modal. The background interface shows a countdown timer (6 hours, 41 minutes, 17 seconds) and a list of documents (16 total) with their eSign status.



# Assign a Notary

You will only need to set the closing date and time.

The screenshot displays the DocMagic eClose Console interface. A modal window titled "Assign / Notify Notary" is open. In the "Notary Provider" dropdown, "NotaryCam" is selected. The "Notary Type" section has "Remote Online Notary" selected. The "Request Summary" section indicates "1 participants for a RON eClosing for a property in Torrance, CA" and shows the "Estimate Closing Date" as "3/25/2021" and "Time" as "12:00 AM". The "Assign Notary" button is highlighted with a green box. The background interface includes a sidebar with "LOAN" and "Signers (2)" sections, and a main area with a "TO CLOSING" timer and "Ready to Close" button.

Click "Assign Notary" when done.



# Assign a Notary

Hit Ready to Close when it's time to alert the NotaryCam Notary. To resend a notification, hit Ready to Close again, and *not* Notify.

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'. 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.
- Buttons:** Details, eJournal, Action Log, and a highlighted 'Ready to Close' button with a red box and a red arrow pointing to it from the text above.

Below these sections is a 'Signers (2)' section with a 'NotaryCam' 'Notify' button. The signers table is as follows:

#	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

At the bottom is a 'Documents (16)' section with a 'Preview Mode' toggle set to 'ON'. The documents table is as follows:

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



# Assign a Notary

If you select *DocMagic RON* as your Notary Provider, a different window (shown below) will appear.

**Assign / Notify Notary**

**\*Notary Provider**  
DocMagic RON

**\*Notary Type**  
 In Person  
 Remote Online Notary (RON)

**Search**

Company Name	First Name	Last Name	Client ID
			TEST

City County State Zip  RON Capable **Search**

	Signers	Notaries
<input type="radio"/>	DOCAGIC NOTARY emily@docmagic.com	emily@docmagic... Yes Yes
<input type="radio"/>	DOCAGIC NOTARY eugener@docmagic.com	eugener@docmag... Yes Yes
<input checked="" type="radio"/>	DOCAGIC NOTARY struitt@docmagic.com	struitt@docmagic... Yes Yes
<input type="radio"/>	DOCAGIC NOTARY alexh@docmagic.com	alexh@docmagic... Yes Yes
<input type="radio"/>	DOCAGIC NOTARY dmitri@docmagic.com	dmitri@docmagic... Yes Yes

**Request Summary**

1 participants for a RON eClosing for a property in Sample, NJ.

\*Estimate Closing Date: 12/21/2022 \*Time: 01:00 PM America/Los Angeles

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

Start by entering your search parameters for a DocMagic Remote Online Notary and hit Search. Please note that entering too many search parameters will limit the results that appear.



# Assign a Notary

Select your notary from the results that appear by clicking the bubble next to their name.

**Assign / Notify Notary**

**\*Notary Provider**  
DocMagic RON

**\*Notary Type** *\*Required*  
 In Person  
 Remote Online Notary (RON)

**Search**

Company Name First Name Last Name Client ID  
City County State Zip

RON Capable **Search**

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

**Request Summary**

1 participants for a RON eClosing for a property in Sample, NJ.

\*Estimate Closing Date: 12/21/2022 \*Time: 01:00 PM America/Los Angeles

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

Please note that you can scroll down to see more results.





# Assign a Notary

Scroll down to Request Summary and select your estimated closing date, time (including AM/PM), and time zone.

**Assign / Notify Notary**

**\*Notary Provider**  
DocMagic RON

**\*Notary Type** *\*Required*  
 In Person  
 Remote Online Notary (RON)

**Search**

Company Name	First Name	Last Name	Client ID
			TEST
City	County	State	Zip
		MD	

RON Capable

**Signers**      **Notaries**

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

**Request Summary**

1 participants for a RON eClosing for a property in Sample, NJ.

\*Estimate Closing Date: 12/21/2022      \*Time: 01:00 PM      America/Los Angeles

Click "Request Notary Services" when done.



# Ready to Close

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

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

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

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

**COUNTDOWN TO CLOSING** section:  
A digital clock showing 0 days, 0 hours, 0 minutes, and 0 seconds.  
Date: Apr 19, 2023 (Wed) Time: 12:00am PDT

A blue arrow points from the text box above to a "Ready to Close" button located in the bottom right corner of the main content area.

**Signers (2)** section:  
A table listing two signers:

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

**Documents (16)** section:  
A table listing 16 documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed.

#	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	✓

NOTE: Remote Online Notary will be covered in a later section.



# Preview Mode Off

Preview Mode will turn off automatically when the Clock hits Zero and signing begins. To be safe, check that Preview Mode is off the day of signing.

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

- LOAN**: Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER**: Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING**: A digital clock showing 0 days, 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 (16)**: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are listed, all with 'Completed' status.

A callout box from the text above points to a 'Preview Mode' toggle switch located at the bottom right of the interface, which is currently set to 'off'.

#	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

#	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	✓

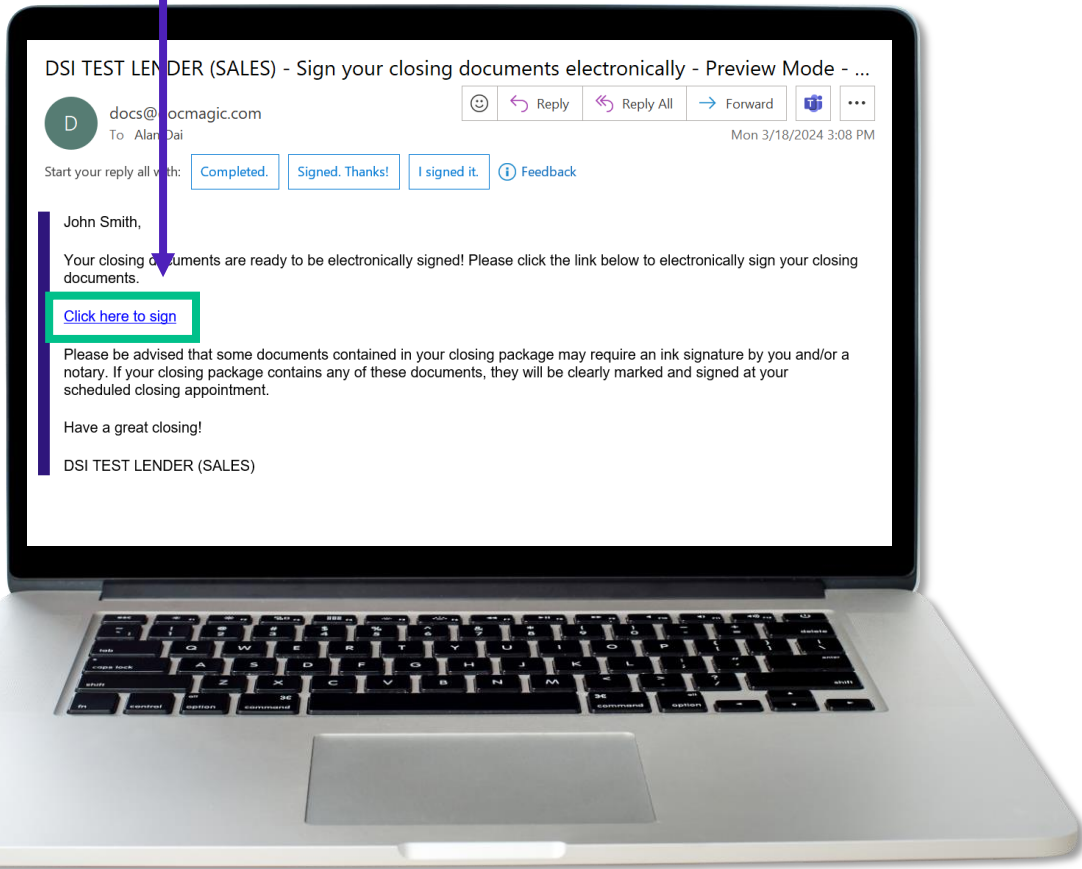




V3 Signing (Borrower's Experience)

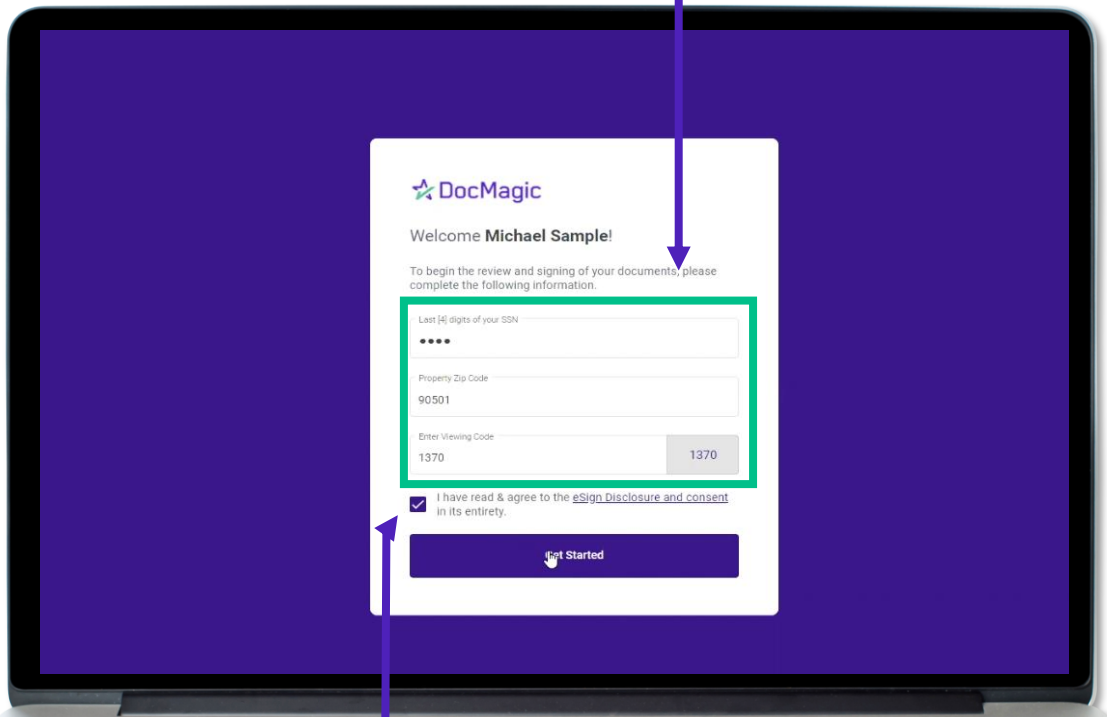
# Logging In

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.



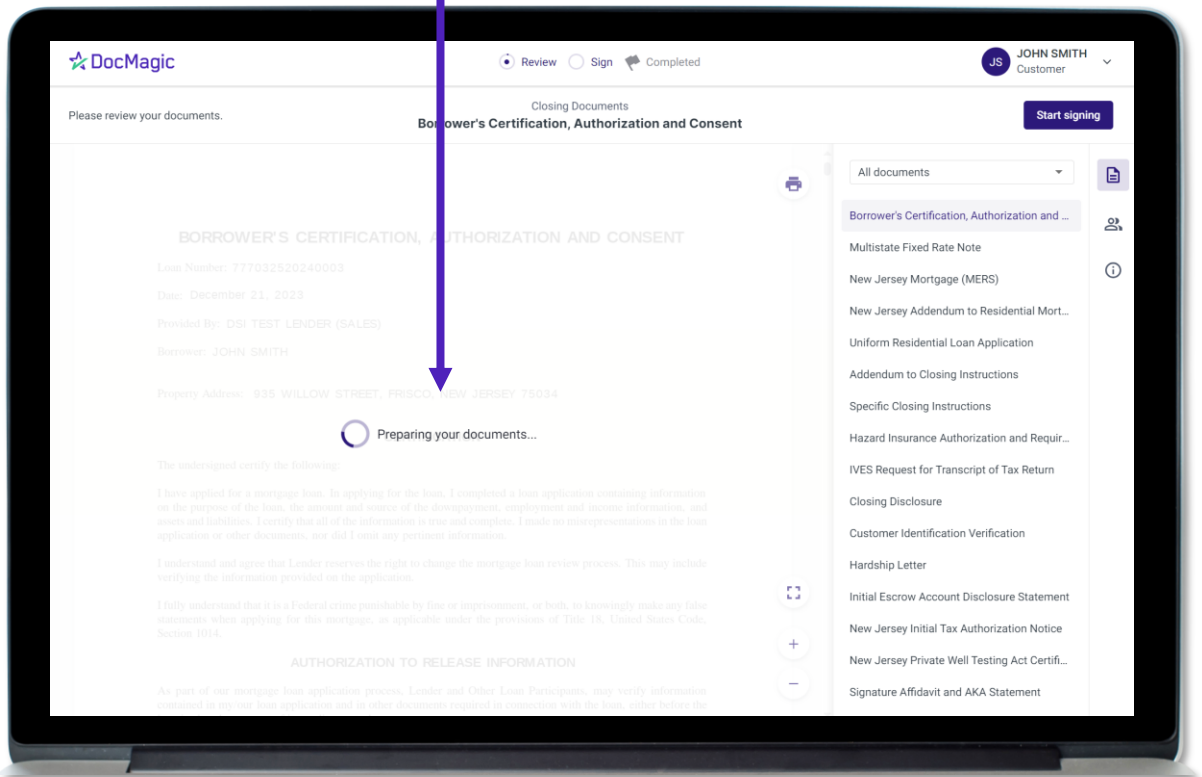
The screenshot shows a laptop displaying the DocMagic login interface. The page has a dark blue background. At the top, the DocMagic logo is visible. Below it, the text reads "Welcome Michael Sample!". A message states: "To begin the review and signing of your documents, please complete the following 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 that is checked, with the text "I have read & agree to the [eSign Disclosure and consent](#) in its entirety." At the bottom is a large blue button labeled "Get Started".

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.

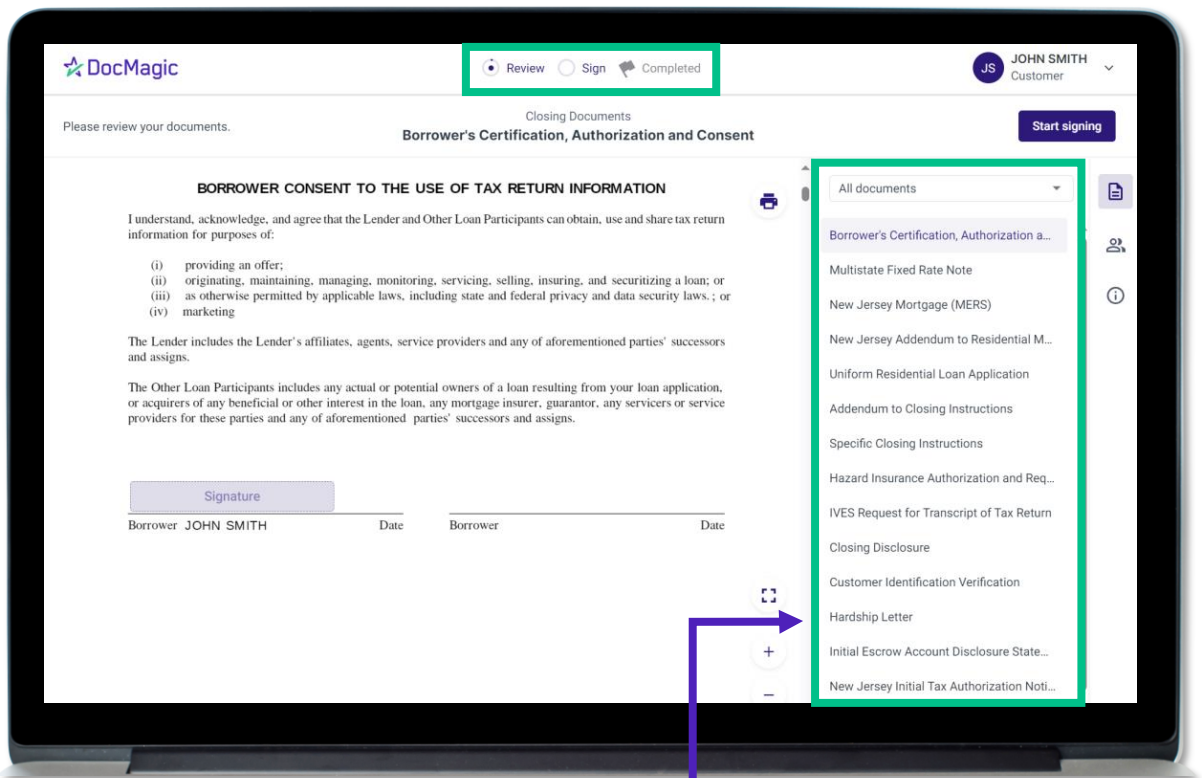


The system will automatically take you to the first document that needs to be signed.



# Page Features

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



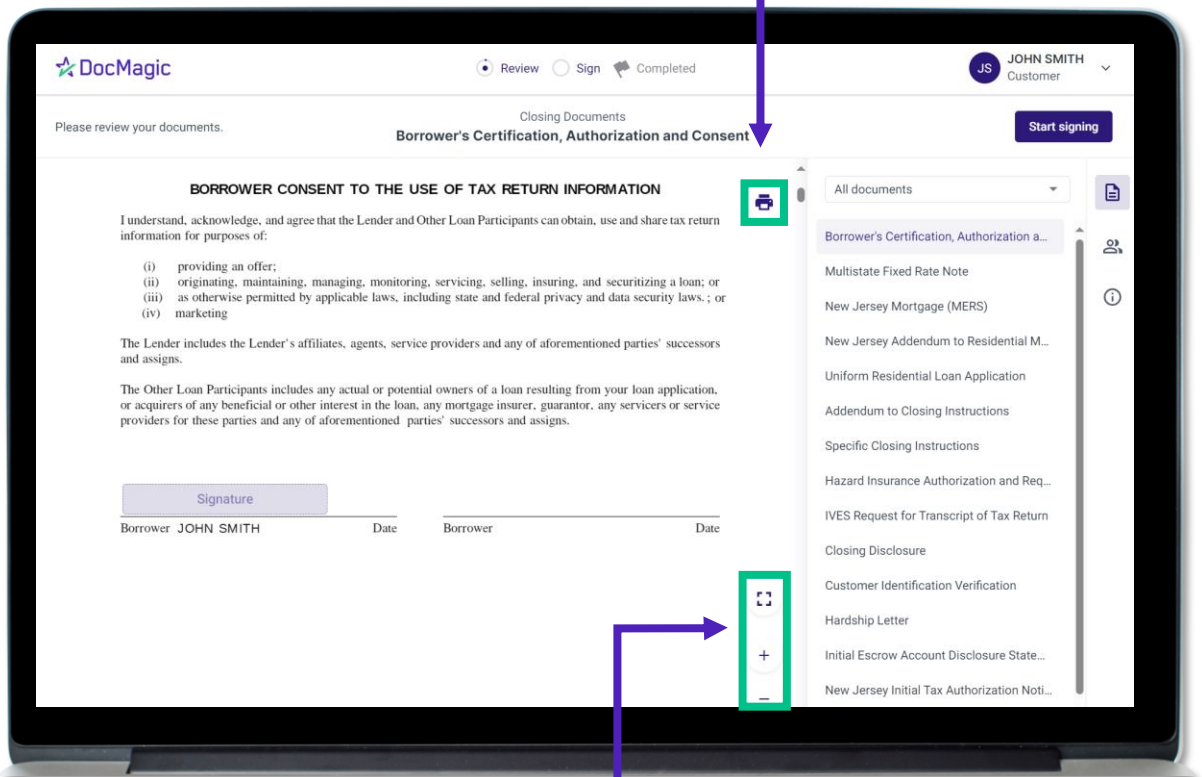
By default, all documents that need to be signed are listed in this column on the right. You can filter this column by documents that need to be ink signed or notarized from the dropdown at the top.





# Page Features

The print icon allows you to print the documents.

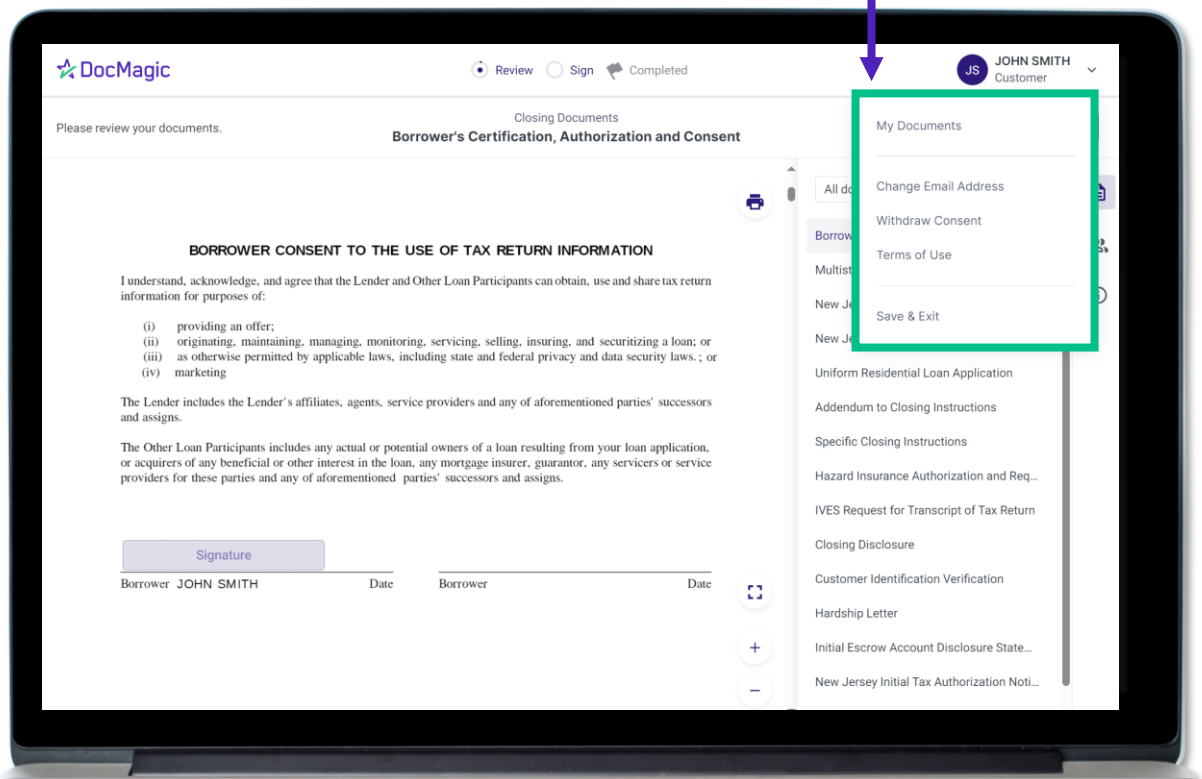


You can expand the signing window and increase or decrease the zoom levels.

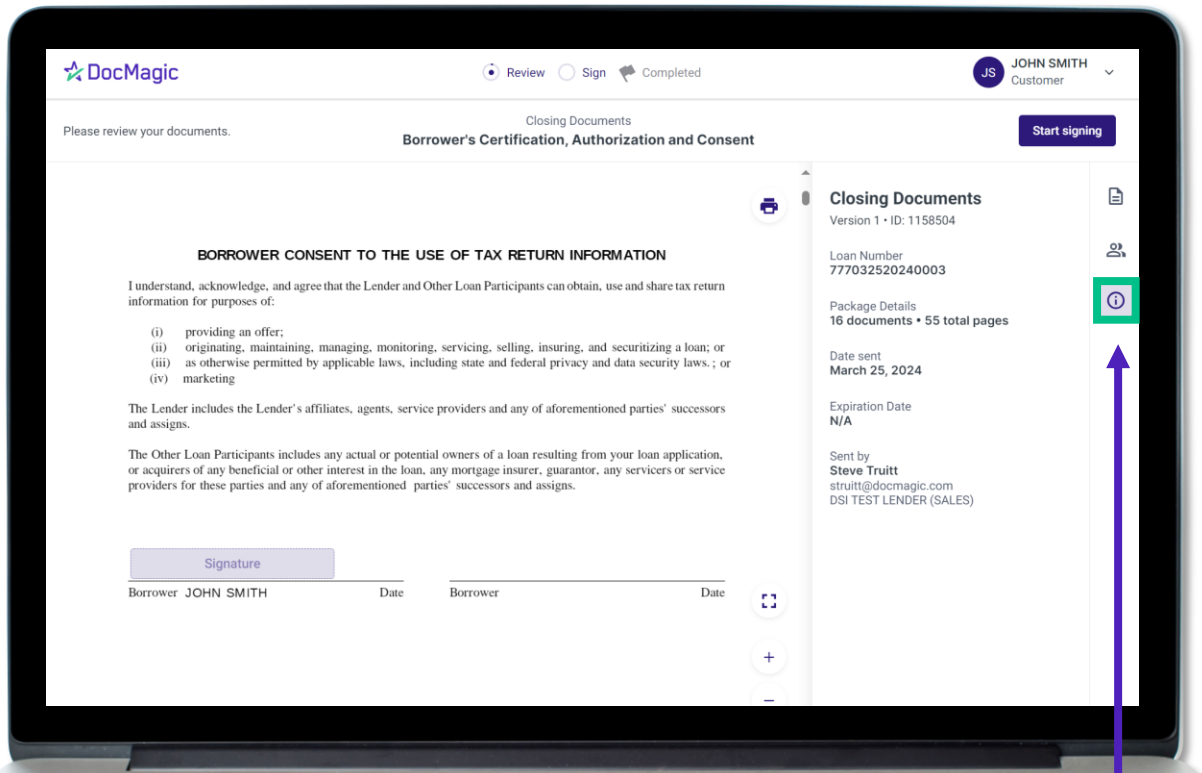


# Borrower Information

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



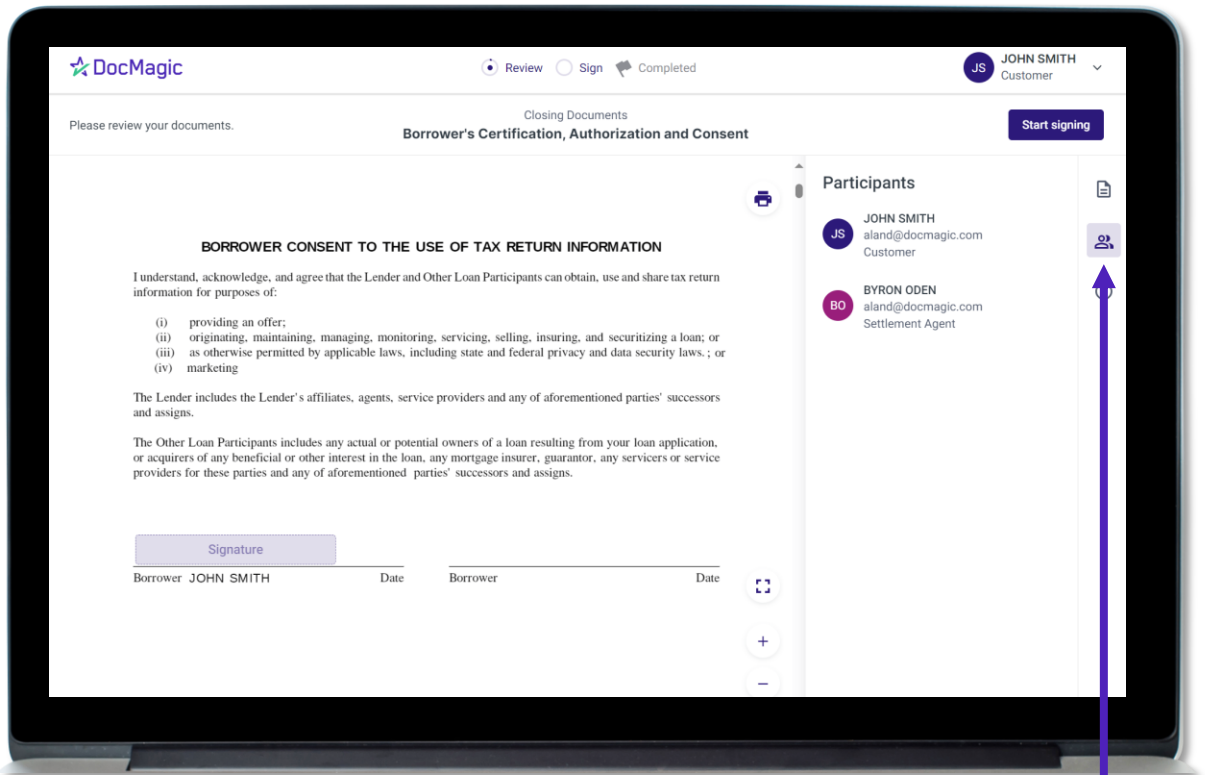
# Page Features



Click the information icon to see document package metadata.



# Participants

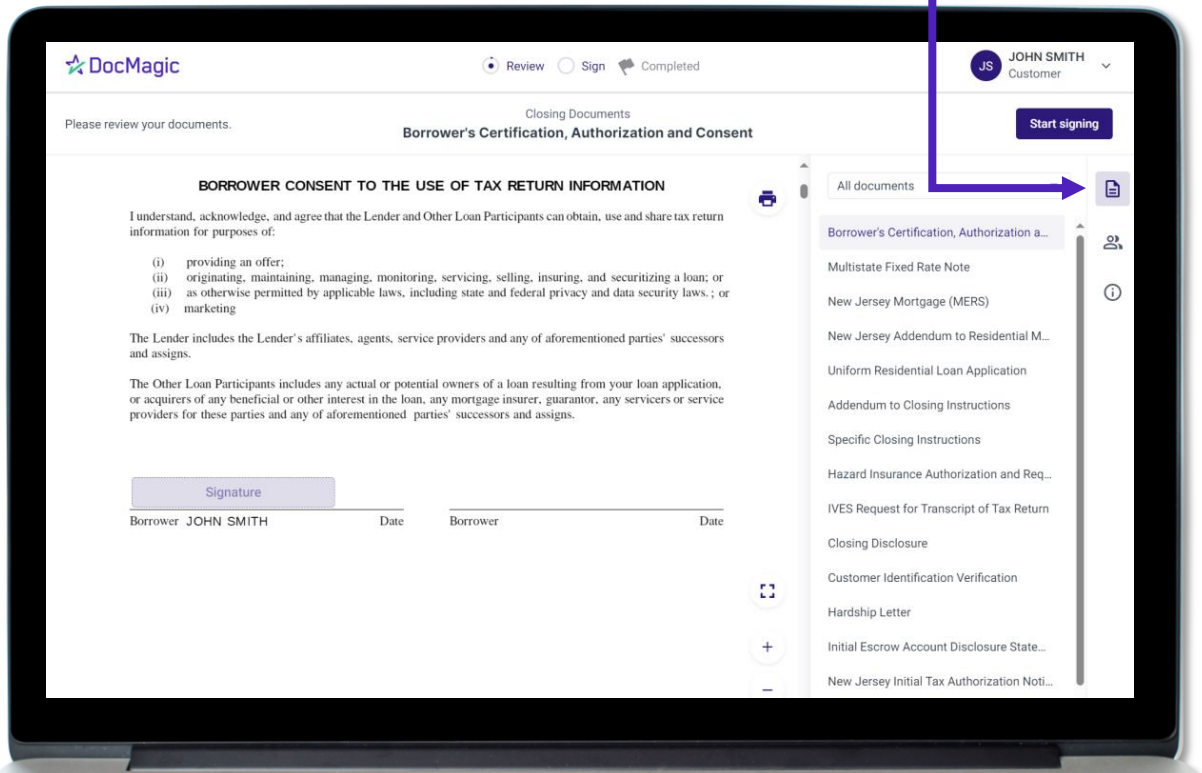


Click here to view participants.



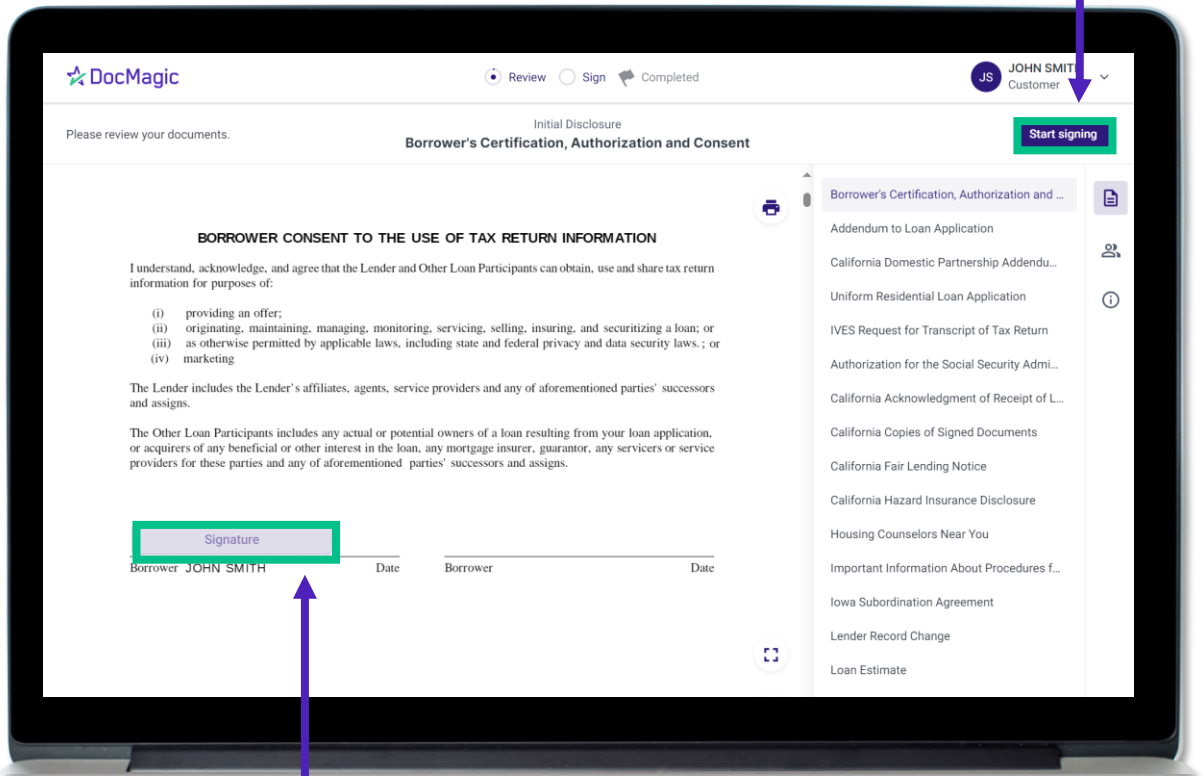
# Return to Documents List

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



# Start Signing

Click "Start Signing" to begin the signing process.



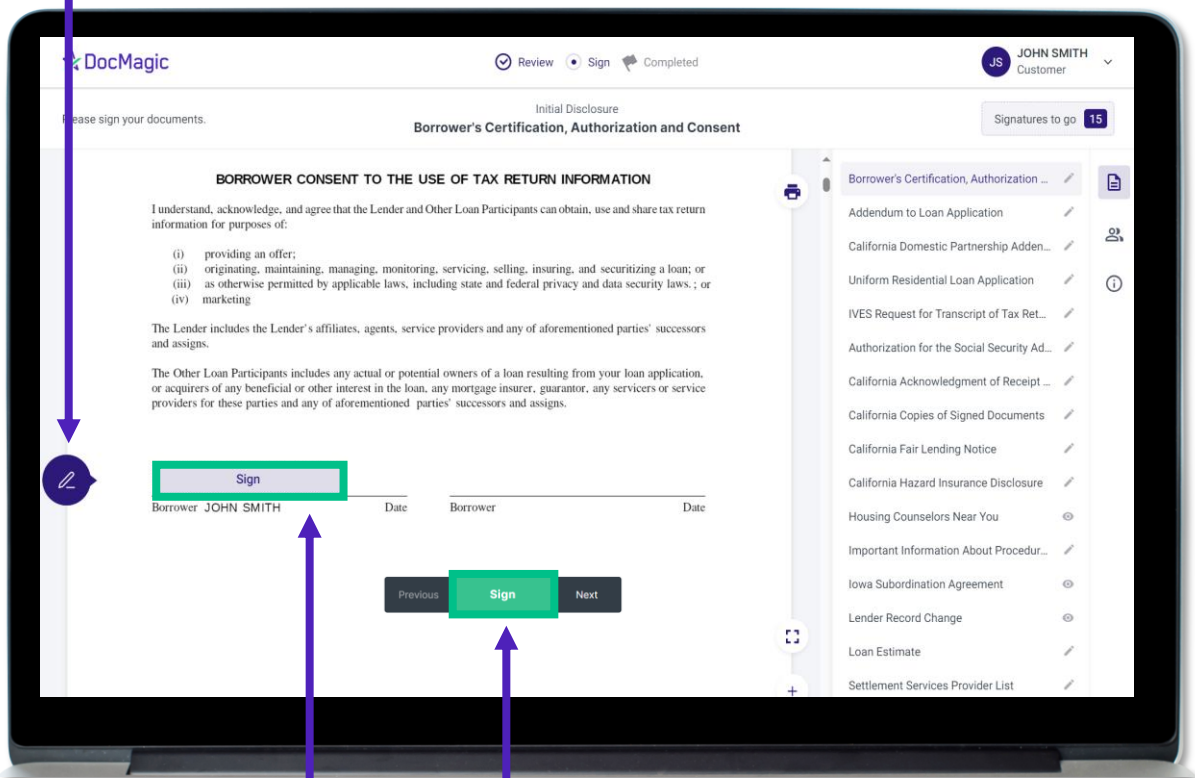
You can't sign anything until you hit the purple button in the top right corner – until then, these will remain greyed out and unclickable.



# Begin Click-Signing

There are three options for click-signing.

1. Clicking the pen icon.



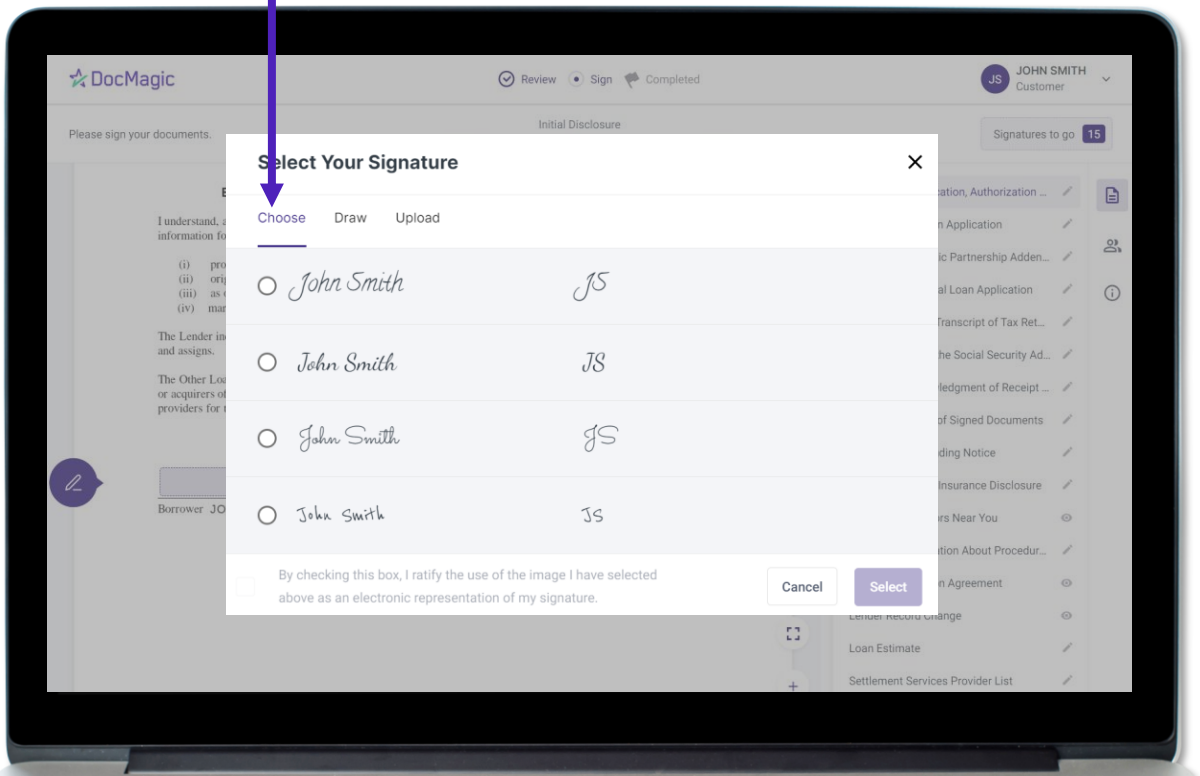
2. Clicking on the "Sign" box directly.

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



# Signature Options

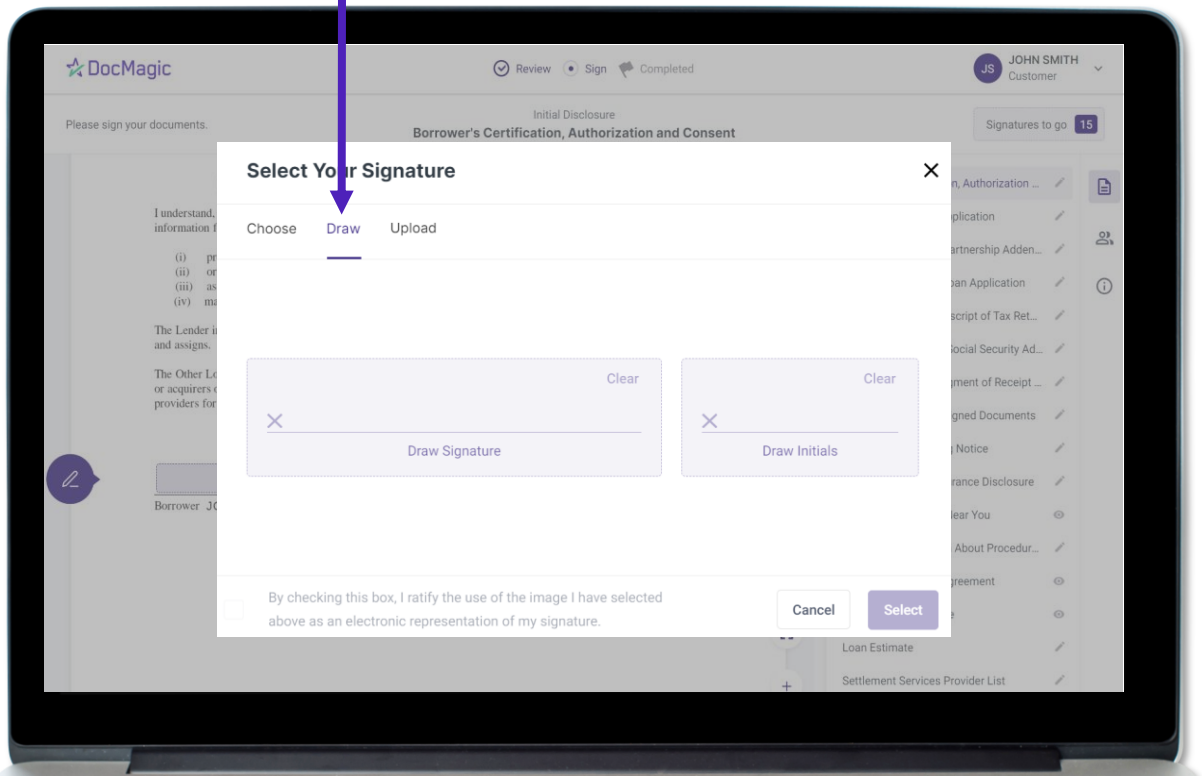
You have the option to choose the pre-formed signatures available in this tab.





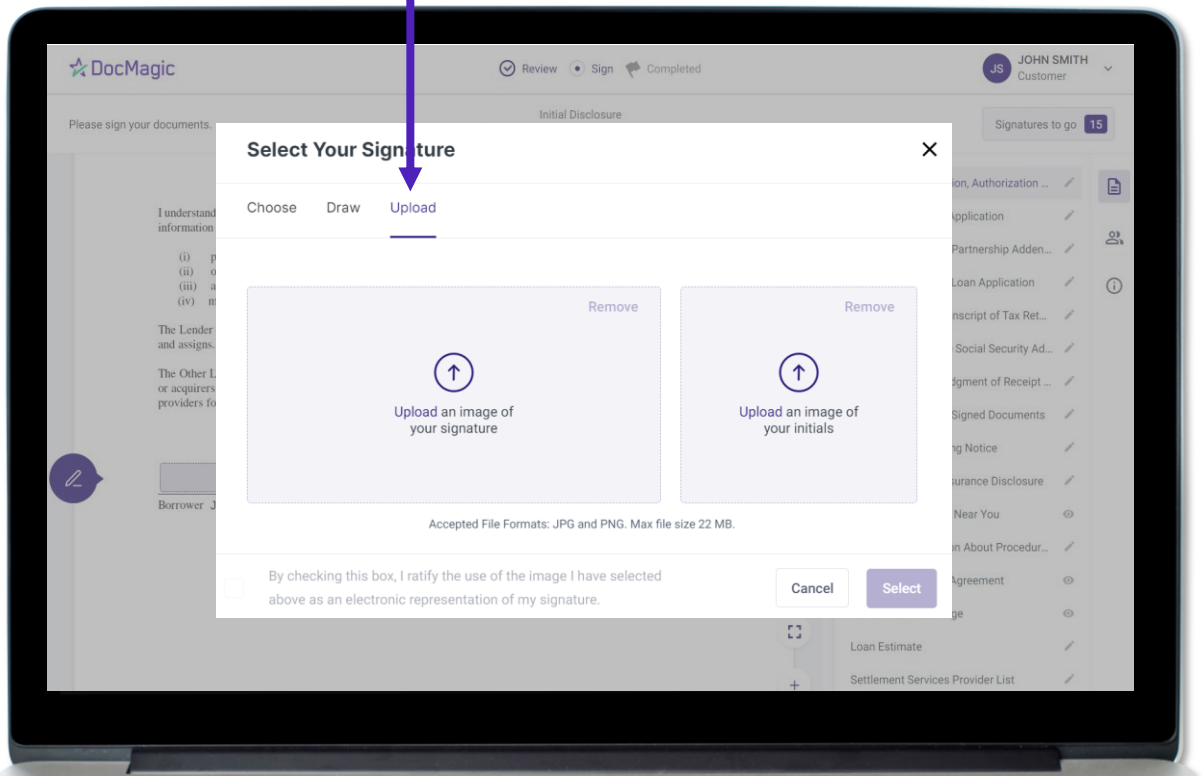
# Signature Options

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

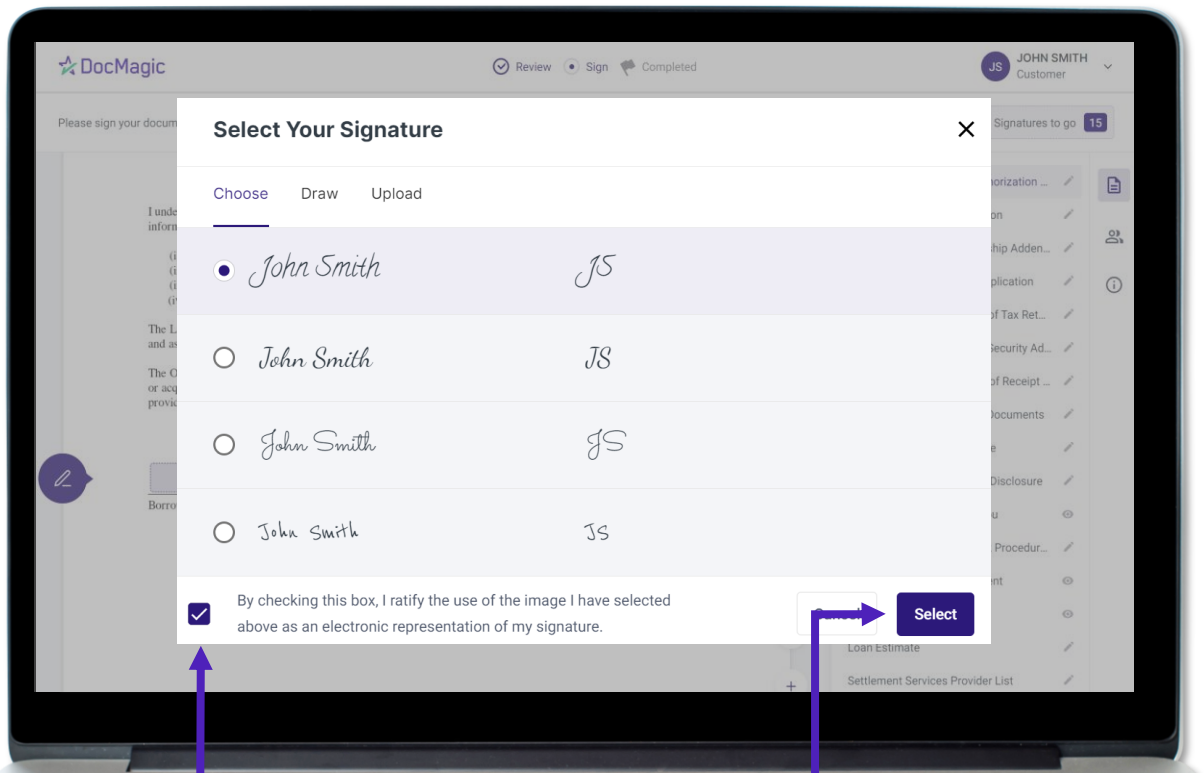


# Signature Options

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

Please sign your documents. Initial Disclosure **Signatures to go 10**

**IVES Request for Transcript of Tax Return**

**LOAN REQUESTOR:** **OSI TEST LENDER (SALES)** **PHONE NUMBER:** (800) 649-1362

**Street address (including apt., room, or suite no.):** 800 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.**

**Signatures 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

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

**Spouse's signature (required if listed on Line 2a)**

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

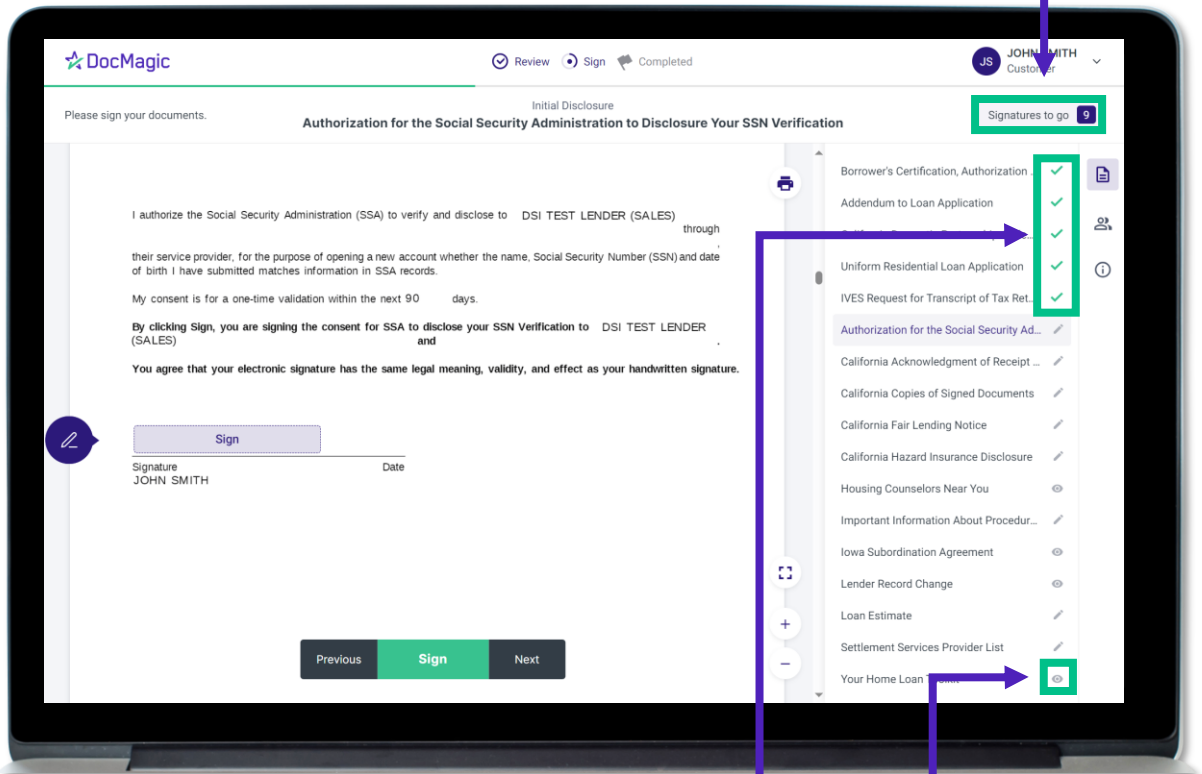
Previous **Check** Next

- 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.



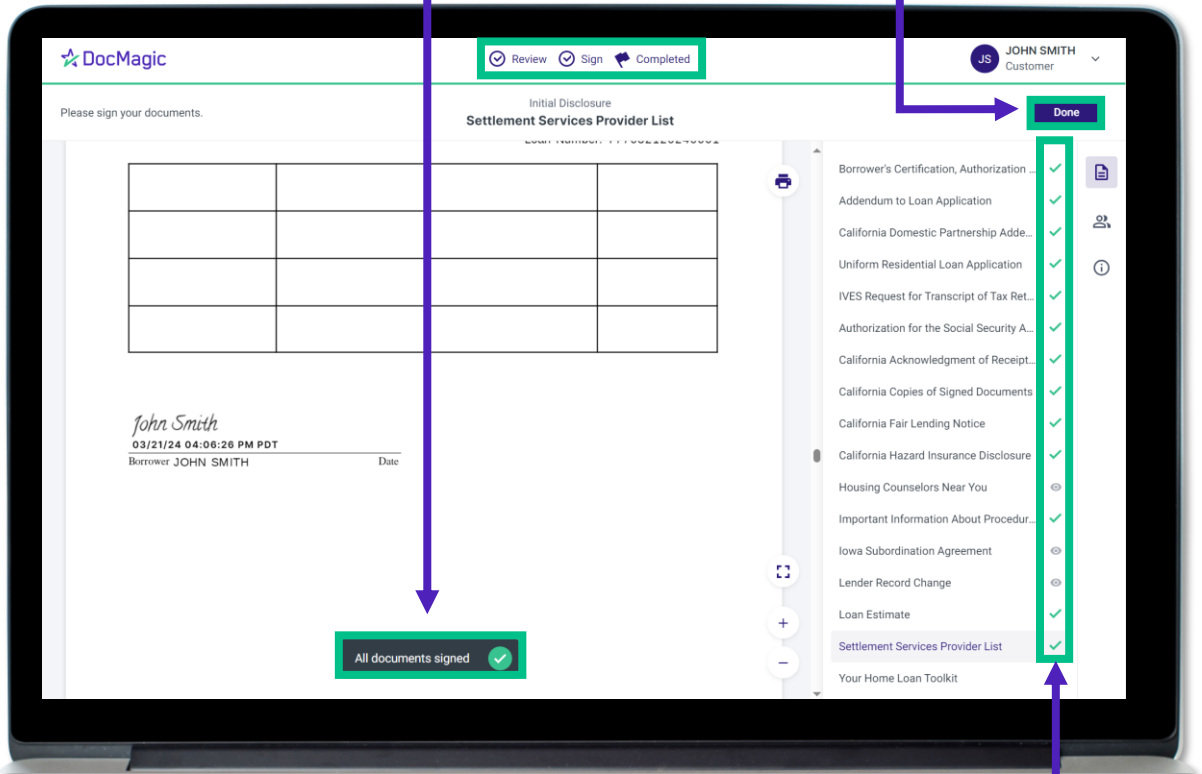
A green check mark next to a document name indicates that it has been signed and completed.

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



# When Complete

These icons will indicate when the process is complete.

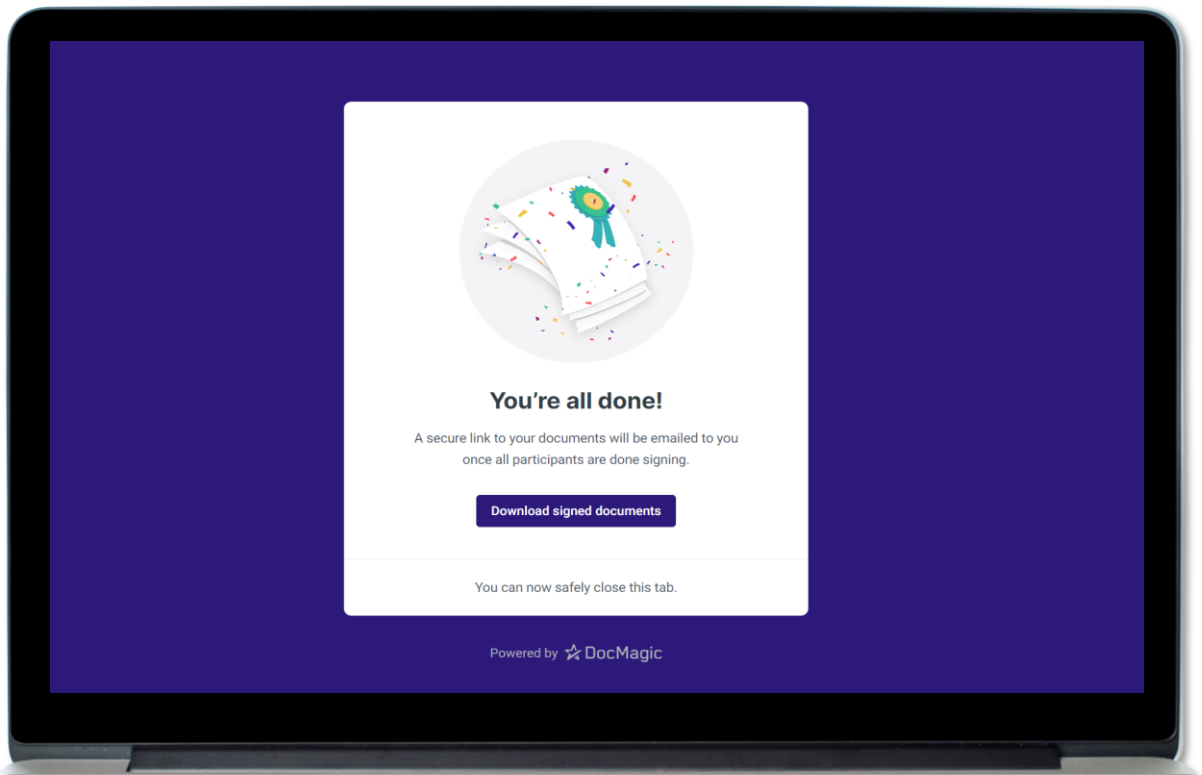


All applicable checkmarks will be green.



## 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.



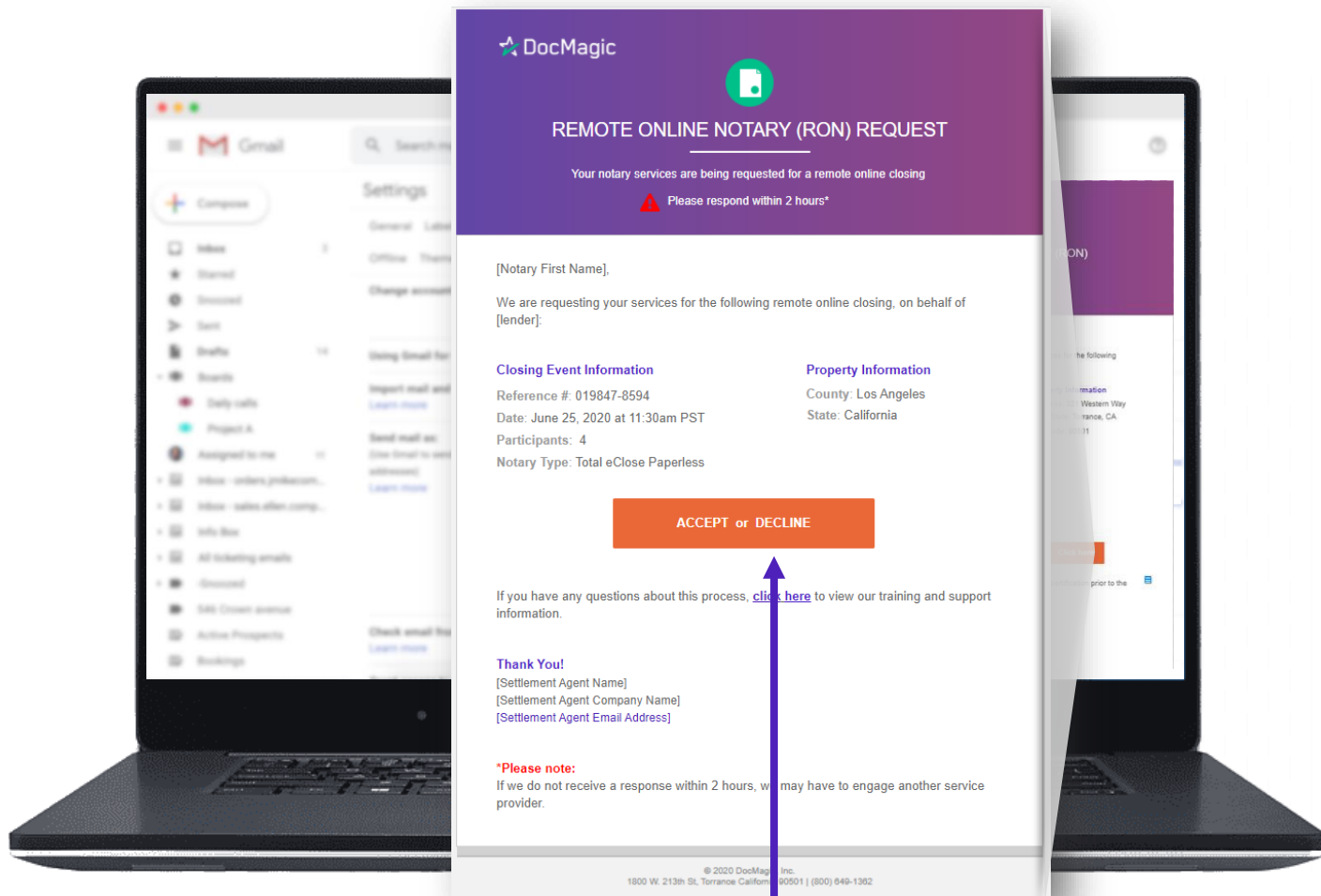




Total eClose (Notary Experience)

# Remote Online Notary Request

The Notary receives a request for R.O.N. services from the Settlement Agent.

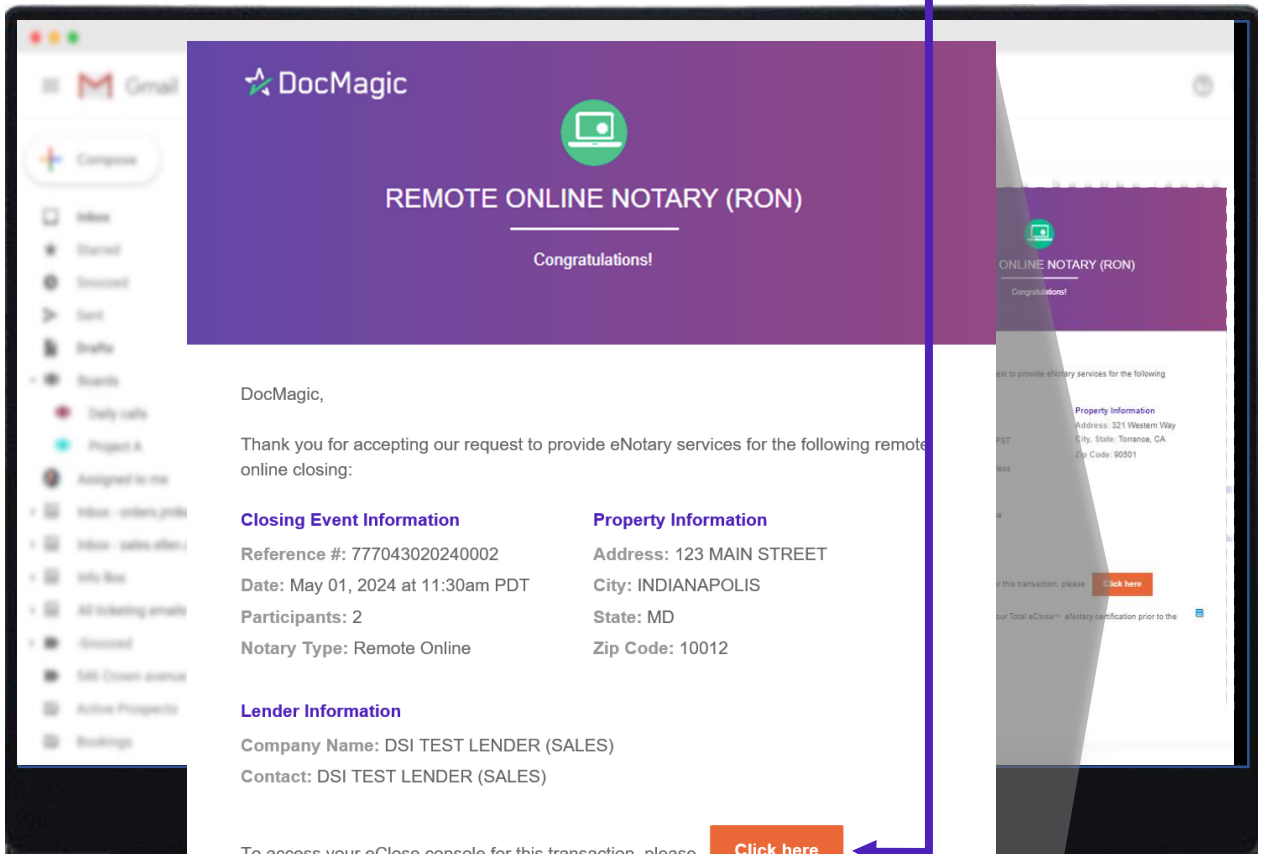


The email includes a link to accept or decline the request.



# Access to the eClose Console

Once the Notary accepts the request, they'll get this confirmation email that grants access to the eClose console.



**\*Please note:** You must obtain your Total eClose™ eNotary certification prior to the closing on May 01, 2024.

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

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

**Thank You!**

Byron Settlement  
SETTLEMENT CLOSING COMPANY  
[struitt@docmagic.com](mailto:struitt@docmagic.com)



# eClose Console

The Notary will be taken to their eClose console, which is very similar to the eClose console for the Settlement Agent.

**DocMagic eClose Console (Notary)**

**LOAN**  
 Loan #: 1636481916201  
 Primary Borrower: John Smith  
 Type: EClosing  
 Package ID: 417659  
 Worksheet #: 1636481916201 [...]

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

**SETTLEMENT AGENT**  
 Company: Settlement Closing...  
 Contact: Sally Settlement  
 Email: strullt@docmagic.c...  
 Phone: (987) 555-4321

**COUNTDOWN TO CLOSING**  
 DAYS: - HOURS: - MINUTES: - SECONDS: -  
 Date: Apr 18, 2023 (Wed) Time: 12:00am PDT [Edit](#)

[Details](#) [eJournal](#) [Action Log](#) [Start eClosing](#)

**Signers (3)**

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

**Documents (6)** [+](#) [-](#) [📄](#) [☁](#) Preview Mode  OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	✓	
2	Multistate Fixed Rate Electronic Note	4	1	✓	
3	MERS New Jersey Mortgage	15	2	✓	
4	Specific Closing Instructions	4	2	✓	
5	Occupancy and Financial Status Affidavit	3	2	✓	
6	Signature Affidavit and AKA Statement	2	2	✓	

**DELL**



# Start eClose

When it's time to close, the Notary will click the Start eClosing button to activate the Start eClosing dialogue box.

**Start eClosing**

**You are about to start the eClosing process!**

A meeting invitation will be sent to the participants indicated below.

**Before you continue, please verify the following:**

- The loan package is complete and ready for eClosing
- All uploaded or e-enabled documents have been included

**Select the eClosing Participants below:**

Select	Signer	Email	Date	Time
<input checked="" type="checkbox"/>	Stephen Truitt	struitt@docmagic.com	3/28/2024	10:30pm
<input checked="" type="checkbox"/>	Kimberly Abelson-truitt	struitt@docmagic.com	3/28/2024	10:30pm
<input type="checkbox"/>	Byron Settlement	struitt@docmagic.com		

Include link for knowledge-based authentication (KBA)

They will select the participant(s) that need to be included in the signing room.



# Start eClose

This box can still be checked even if KBA isn't required, if the Notary intends to have the borrower complete the verification process with the invitation.

**Start eClosing**

**You are about to start the eClosing process!**

A meeting invitation will be sent to the participants indicated below.

**Before you continue, please verify the following:**

- The loan package is complete and ready for eClosing
- All uploaded or e-enabled documents have been included

**Select the eClosing Participants below:**

Select	Signer	Email	Date	Time
<input checked="" type="checkbox"/>	Stephen Truitt	struitt@docmagic.com	3/28/2024	10:30pm
<input checked="" type="checkbox"/>	Kimberly Abelson-truitt	struitt@docmagic.com	3/28/2024	10:30pm
<input type="checkbox"/>	Byron Settlement	struitt@docmagic.com		

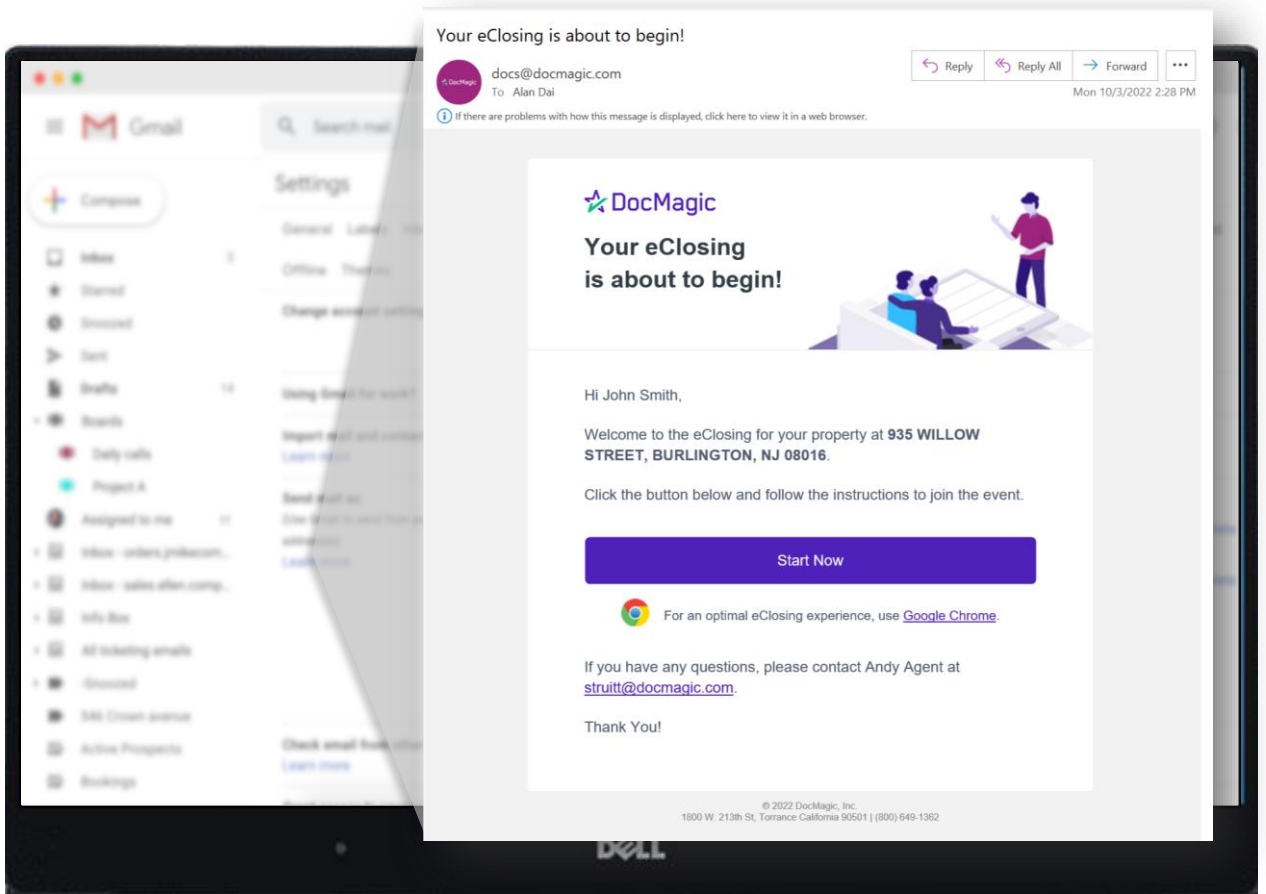
Include link for knowledge-based authentication (KBA)

They will click Start eClosing when ready.

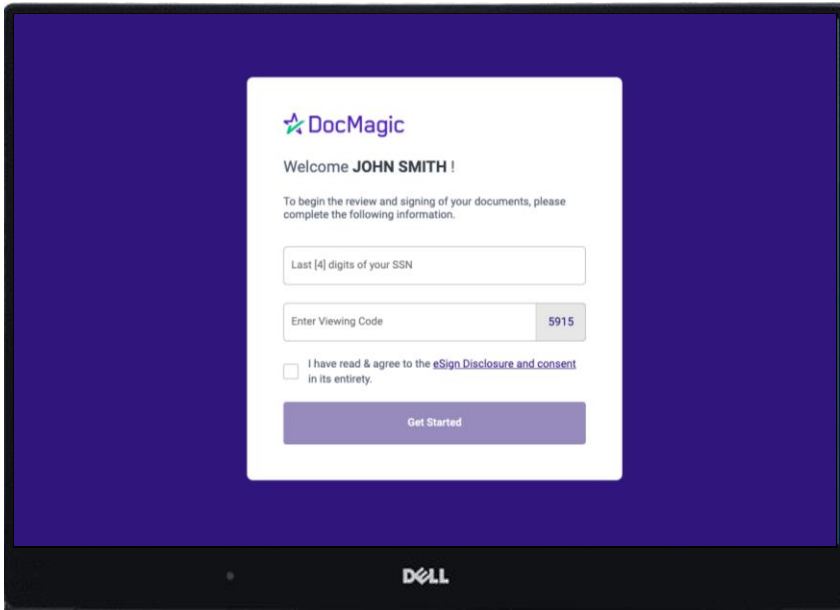


# Invitation Email

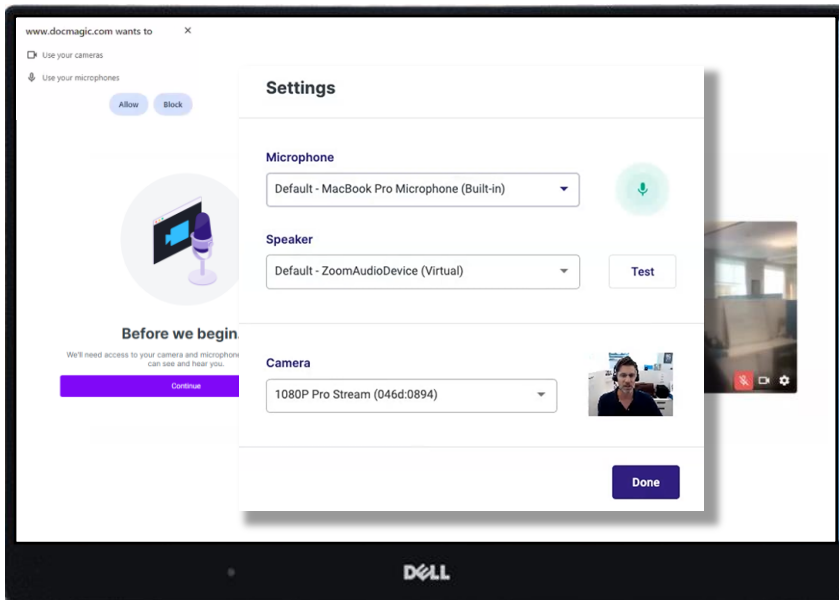
Participants will receive an invitation email containing all pertinent closing information and a **Start Now** button to enter the eClosing event.



# Accessing The Signing Room (Borrower)



The Borrower logs in with a passcode and a viewing code.



The borrower will also check their mic and camera settings.





# Accessing The Signing Room (Notary)

Company Logo

To proceed with notarization, please provide your current location, including the state, county, and your professional title.

State  
Arizona

County  
Maricopa

Your Title  
Notary Public

Confirm

Meanwhile the Notary will also log in and enter in some of their information.

www.docmagic.com wants to

Use your cameras

Use your microphones

Allow Block

**Settings**

**Microphone**  
Default - MacBook Pro Microphone (Built-in)

**Speaker**  
Default - ZoomAudioDevice (Virtual)

**Camera**  
1080P Pro Stream (046d.0894)

Before we beg  
We'll need access to your camera and microph can see and hear you.

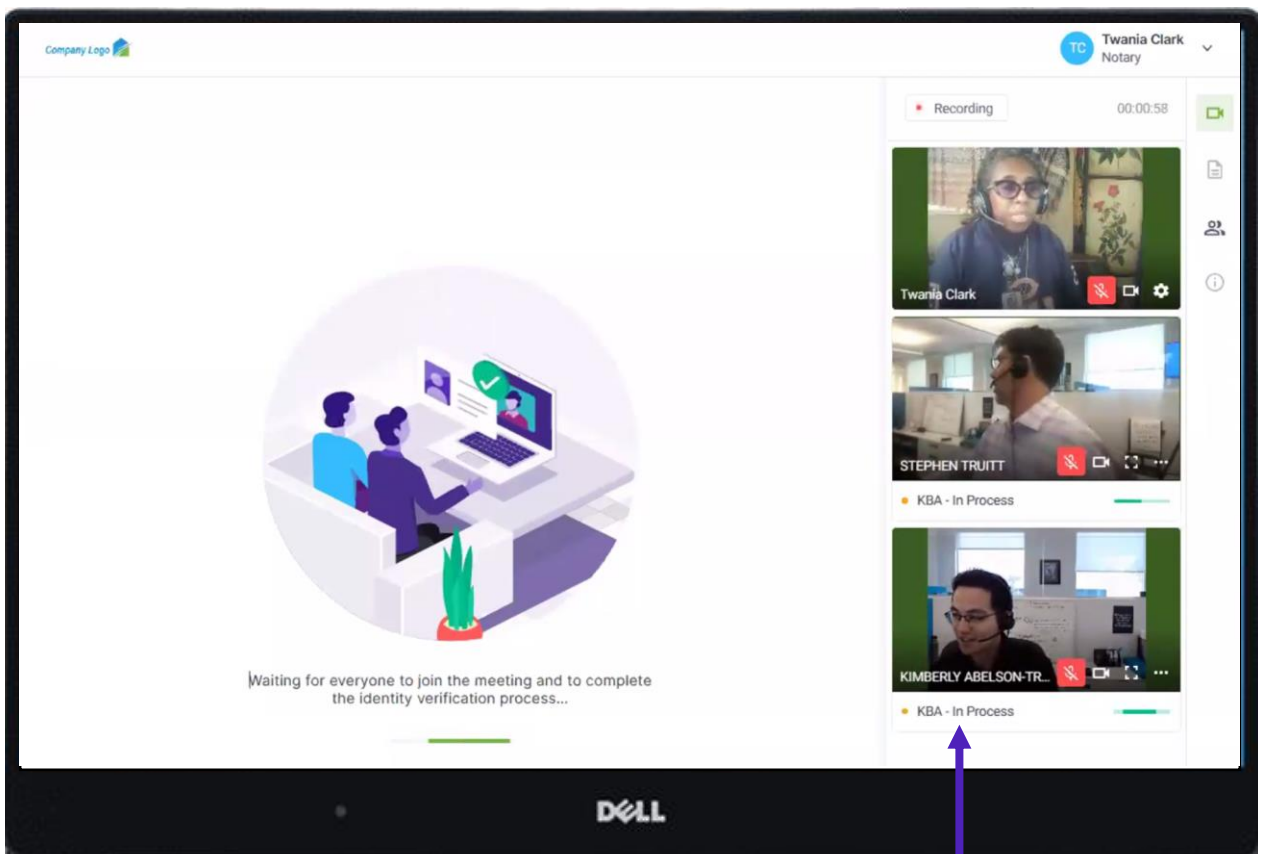
Continue Done

They will also confirm their mic and camera settings.



# Knowledge Based Authentication

If Knowledge Based Authentication is enabled for the session, the borrower(s) will need to verify their identity when the first join.

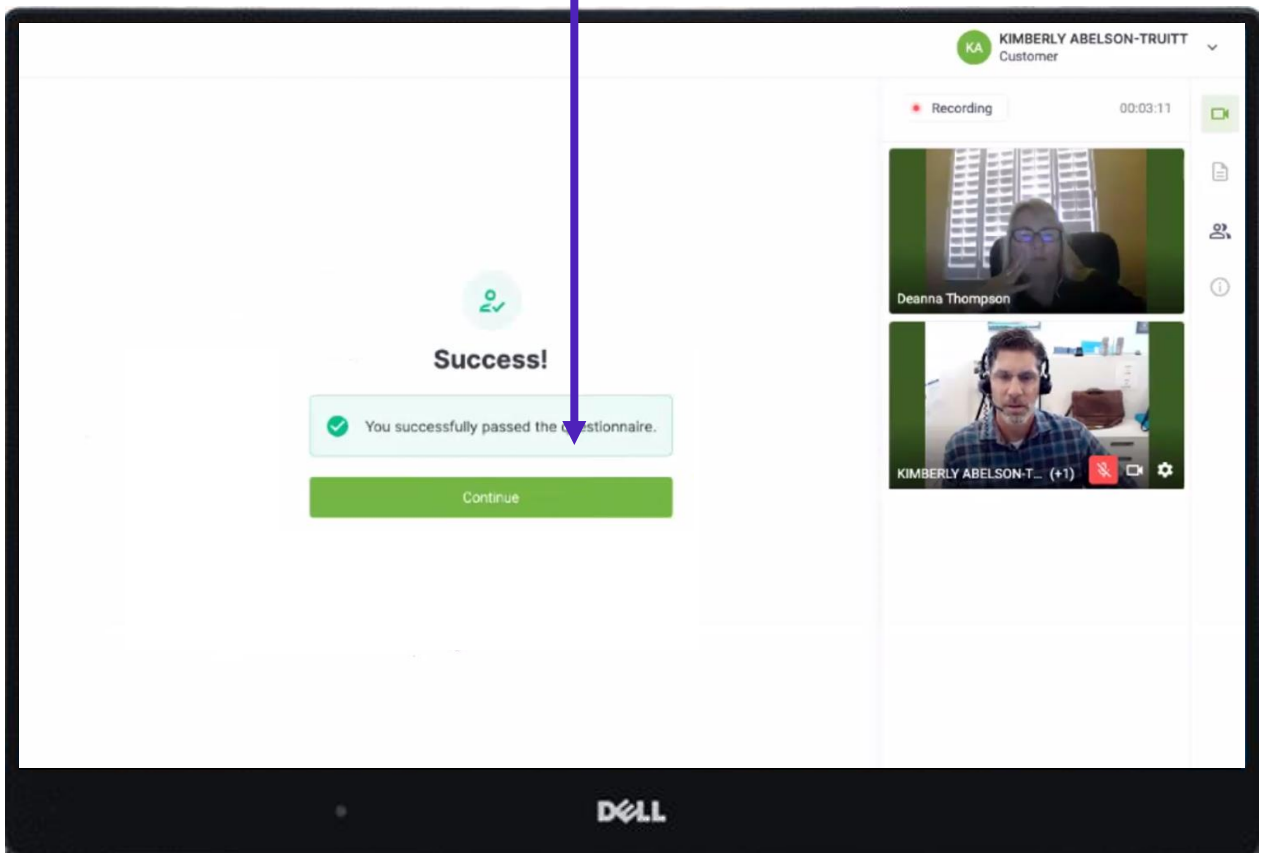


The borrowers will have two minutes to answer five questions about themselves. The Notary does not see the KBA – only this “KBA – In Process” status.



# Knowledge Based Authentication

When the Participant successfully completes the assessment, they will receive this confirmation where they can click Continue to join the closing room.



If required, the Notary would also initiate the I.D. Verification process. This must be done during the actual signing and will be covered in the next slides.



# Identity Validation Request

The Notary will go back to their eClose Console and click on the phone icon for the borrower that needs to have their identity verified.

The screenshot displays the DocMagic eClose Console (Notary) interface. A modal window titled "Initiate Identity Verification" is open, showing a form with the following fields and elements:

- Mobile Phone #:** (310) 463-9056
- Additional Comments:** Hello, please use this link for your eClosing ID verification process.
- Identity Verification Link:** <https://www.docmagic.com/esign/esign/scanVerify/g20vxj4o>
- Buttons:** Cancel, Text Identity Verification (highlighted with a hand cursor), Copy Link

The background interface includes sections for LOAN, LENDER, and SETTLEMENT AGENT, a COUNTDOWN TO CLOSING timer, and a table of signers.

Signer(s)	Completed	Delete
1	✓	
1	✓	
2	✓	
2	✓	
2	✓	

They will confirm the phone number and click Text Identity Verification.



## I.D. Validation via Smart Device

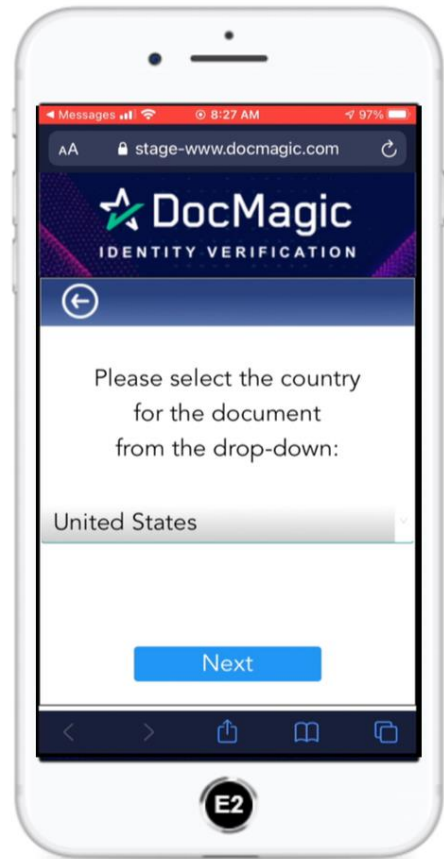
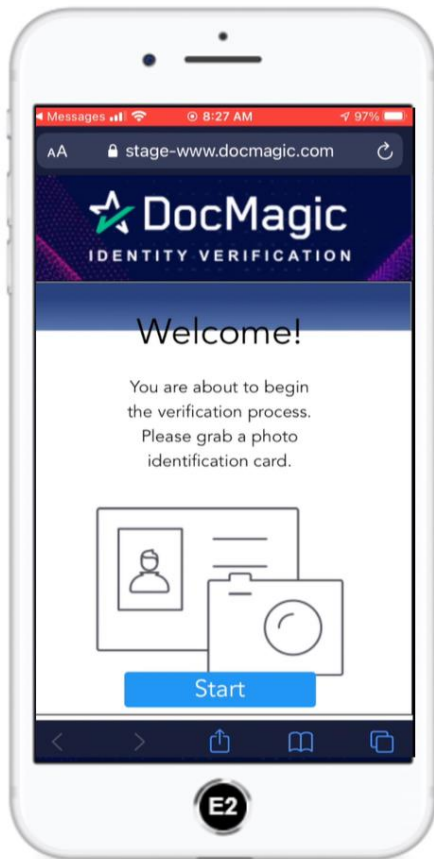


The Participant will receive a text message containing a link to complete the I.D. Verification process.



## I.D. Validation via Smart Device

The borrower will be taken to a screen that asks them to retrieve a photo identification card.

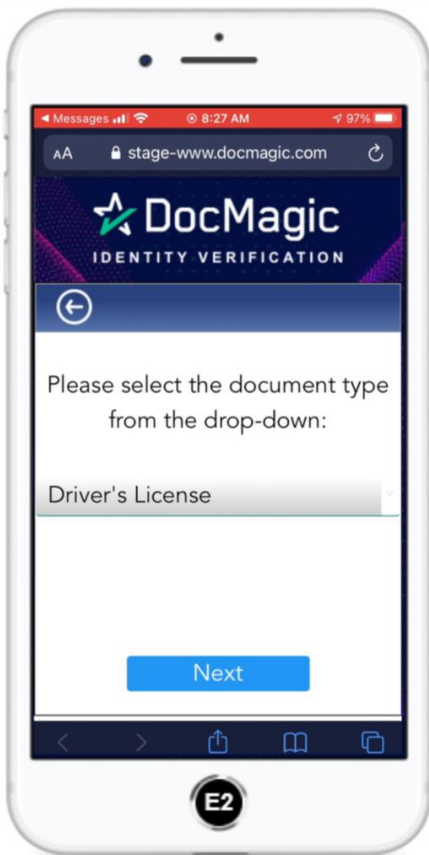


Next, the borrower will select the country that issued their identification.



## I.D. Validation via Smart Device

The borrower will choose their form of identification from the drop-down menu.

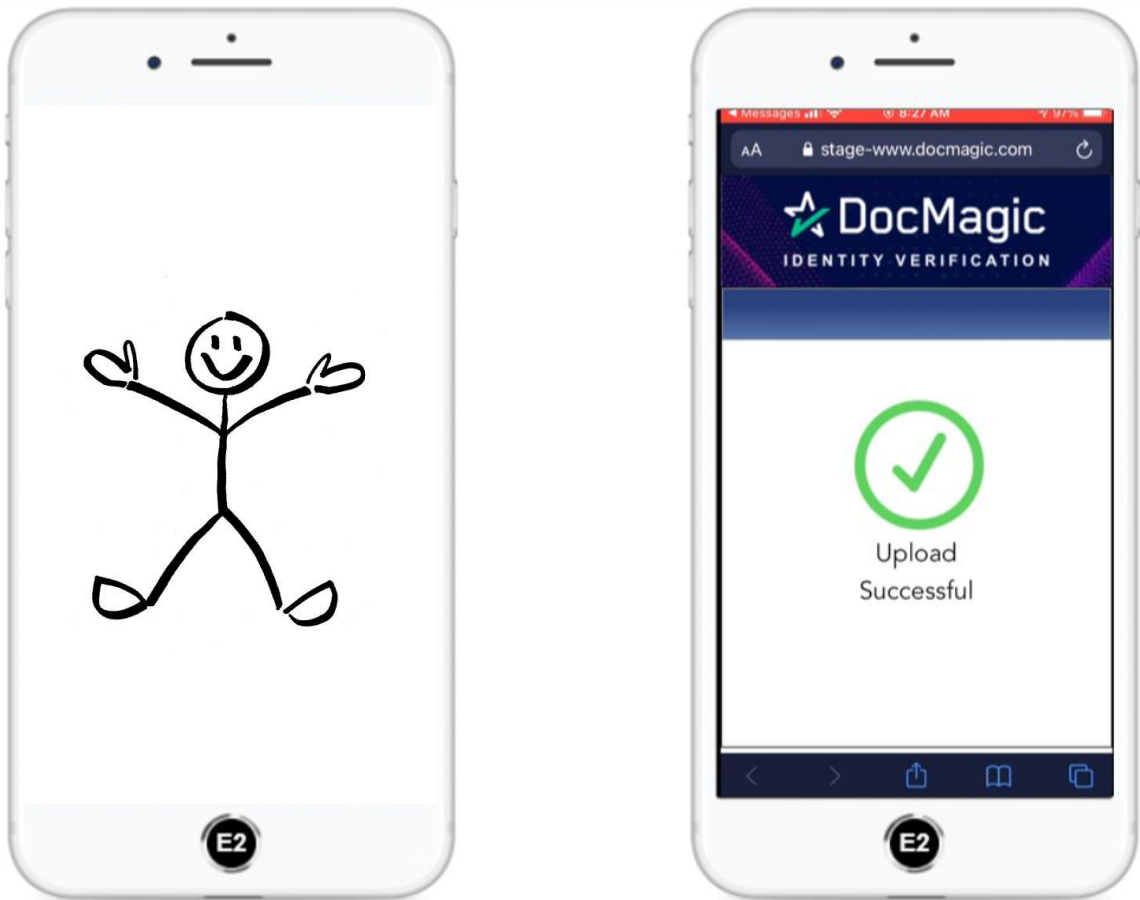


Next, they will select a file from their phone or take a photo and upload it. *The borrower will repeat the process and upload both sides of the I.D.*



## I.D. Validation via Smart Device

The borrower may also be asked to take a selfie so the system can compare the image with official identification.



A green check mark, shown on the right, indicates that the upload of the ID was successful.





# I.D. Verify Fail

If the I.D. Verification fails, the notary may click on the red circle. A window will appear where they may enter information related to the borrower's identity to override the failure.

The screenshot shows the DocMagic interface with a modal window titled "Identity (ID) Verification Results". The modal contains the following information:

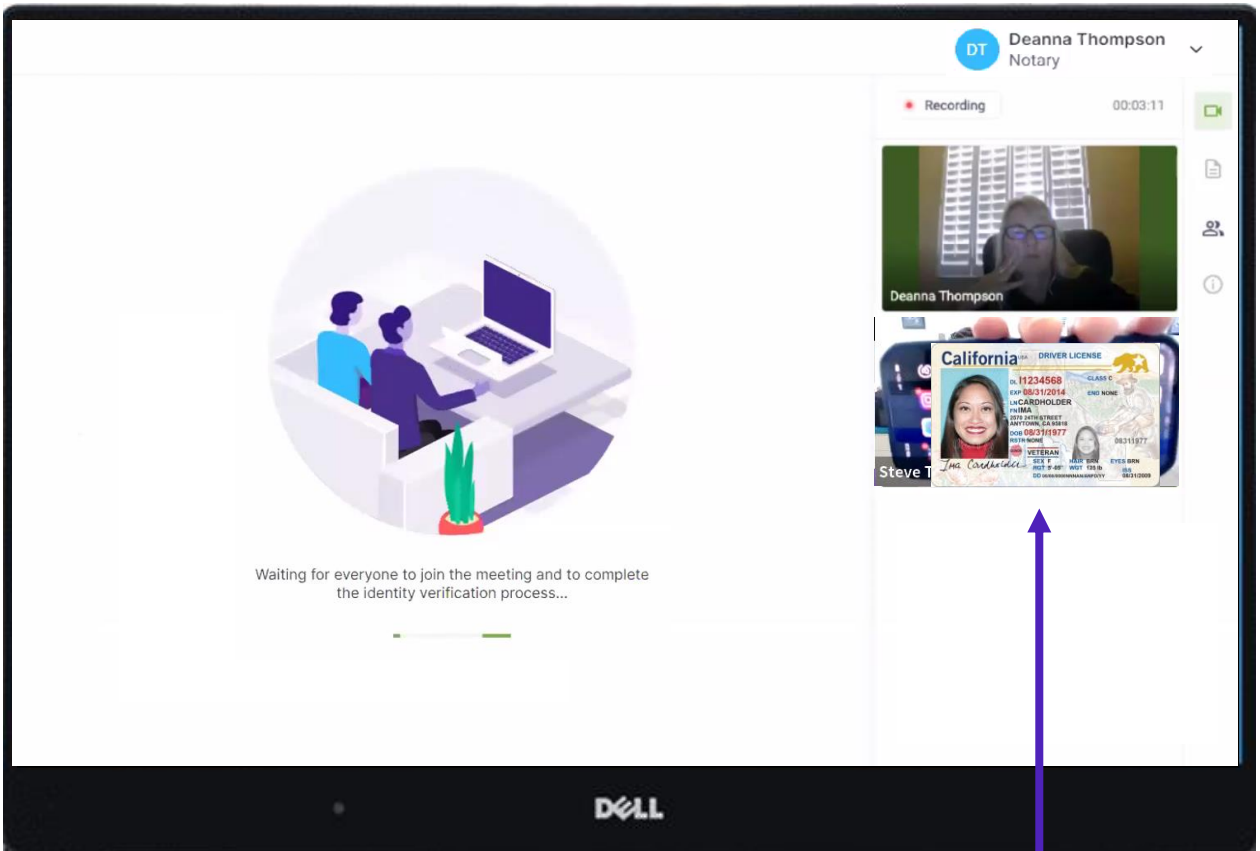
- Header:** A red circle with a white 'X' icon, followed by the text "Signer has Failed the Identity Verification Test".
- Confidence Score:** "Confidence Score: 0%".
- Buttons:** "View Report" (with a link icon).
- Additional Verification:** A section labeled "Additional Verification" with a red asterisk and "Required" text. It contains three input fields:
  - \*ID Type: A dropdown menu with "Select" as the current value.
  - \*ID Number: A text input field with the placeholder "Enter ID Number".
  - \*Expiration: A text input field with the placeholder "MM/DD/YYYY".
- Attachments:** A section labeled "Attachments" with a plus icon and the text "No attachments added".
- Disclaimer:** A checkbox with the text "\* I have checked the signer's identification and verified that all of the information is correct".
- Buttons:** "Close" and "Save" (highlighted with a red circle).

The background interface shows a list of signers and a table of document completion status. A red circle on the table highlights the failed verification status for one of the signers.

The Notary will fill out all required fields. They have the option to attach pictures of the ID, which is recommended, and then click Save when done.



# I.D. Verification Alternative



If the upload of the identification in the I.D. Verify process is rejected, the Notary may use the video to establish proof of possession of a government issued I.D. The borrower can hold up their ID while the notary takes a screenshot.



# Signer's View

Once the borrower enters the signing experience, they will find indicators that show progress of the Review, Signing, and Notarization processes along the top.

The screenshot displays the DocMagic user interface. At the top, a navigation bar includes the DocMagic logo and progress indicators for 'Review' (checked), 'Sign', 'Notarize', and 'Completed'. A 'Start signing' button is located in the top right corner. The main content area shows a document titled 'Initial Disclosure Authorization and Consent'. An email preview is overlaid on the screen, showing a message from 'DSI TEST LENDER (SALES)' with a 'Click here to review' link. A list of documents is visible on the right side of the interface, including 'Borrower's Certification, Authorization and ...', 'Loan Application', 'Domestic Partnership Addendu...', 'idential Loan Application', 'st for Transcript of Tax Return', 'n for the Social Security Admi...', 'cknowledgment of Receipt of L...', 'opies of Signed Documents', 'air Lending Notice', 'azard Insurance Disclosure', 'nselors Near You', 'ormation About Procedures f...', 'ination Agreement', 'ard Change', and 'Loan Estimate'.

If the borrower is done reviewing the set of documents, they can begin the signing process by clicking here.

If Preview Mode is on, the borrower can *review* their document package, accessing it from a link that is emailed to them. We advise that the borrower reviews the documents during this period, so that they can focus on just signing during the experience.



# Fixing Incorrectly Tagged Documents

If the notary finds an improperly tagged document during the signing experience, they may edit the document by going back to their eClose Console.

The screenshot shows the DocMagic eClose Console (Notary) interface. At the top, there are sections for LOAN, LENDER, and SETTLEMENT AGENT, along with a COUNTDOWN TO CLOSING timer. Below these are tabs for Details, eJournal, and Action Log. The main section is titled 'Signers (3)' and contains a table with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Below the signers is a 'Documents (6)' section with a table listing documents. The first document, 'Closing Disclosure', has an edit icon (a pencil inside a square) highlighted with a red box. A blue arrow points from the text box above to this icon.

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	John Smith struitt@docmagic.com	Borrower	Doc Magic ron-test@docmagic.com	DocMagic RON 11/9/2021 - 12:00am			● Not Started	<input type="button" value="Open Signing Room"/>
2	Oliver Originator oliver.originator@mailinat...	Originator					● Ready to Sign	<input type="button" value="Open Signing Room"/>
3	Sally Settlement struitt@docmagic.com	Settlement Agent					● Ready to Sign	<input type="button" value="Open Signing Room"/>

#	eSign Enabled	Page(s)	Signer(s)	Completed	Delete
1	Closing Disclosure	5	1	<input checked="" type="checkbox"/>	
2	Multistate Fixed Rate Electronic Note	4	1	<input checked="" type="checkbox"/>	
3	MERS New Jersey Mortgage	15	2	<input checked="" type="checkbox"/>	
4	Specific Closing Instructions	4	2	<input checked="" type="checkbox"/>	
5	Occupancy and Financial Status Affidavit	3	2	<input checked="" type="checkbox"/>	
6	Signature Affidavit and AKA Statement	2	2	<input checked="" type="checkbox"/>	



# Refresh Documents

After saving their changes, they can go back to the signing experience and click the three dots at the bottom right of the borrower's screen.

The screenshot displays a DocMagic Notary interface. At the top, a status bar reads "Waiting for JOHN SMITH to start signing...". The main content area is titled "BORROWER'S CERTIFICATION, AUTHORIZATION AND CONSENT" and contains the following text:

Loan Number: 777030720220005  
Date: March 7, 2023  
Provided By: DSI TEST LENDER (SALES)  
Borrower: JOHN SMITH  
Property Address: 935 WILLOW STREET, ALLENDALE, NEW JERSEY 07401

**CERTIFICATION**

The undersigned certify the following:

I have applied for a mortgage loan. In applying for the loan, I completed a loan application containing information on the purpose of the loan, the amount and source of the downpayment, employment and income information, and assets and liabilities. I certify that all of the information is true and complete. I made no misrepresentations in the loan application or other documents, nor did I omit any pertinent information.

I understand and agree that Lender reserves the right to change the mortgage loan review process. This may include verifying the information provided on the application.

I fully understand that it is a Federal crime punishable by fine or imprisonment, or both, to knowingly make any false statements when applying for this mortgage, as applicable under the provisions of Title 18, United States Code, Section 1014.

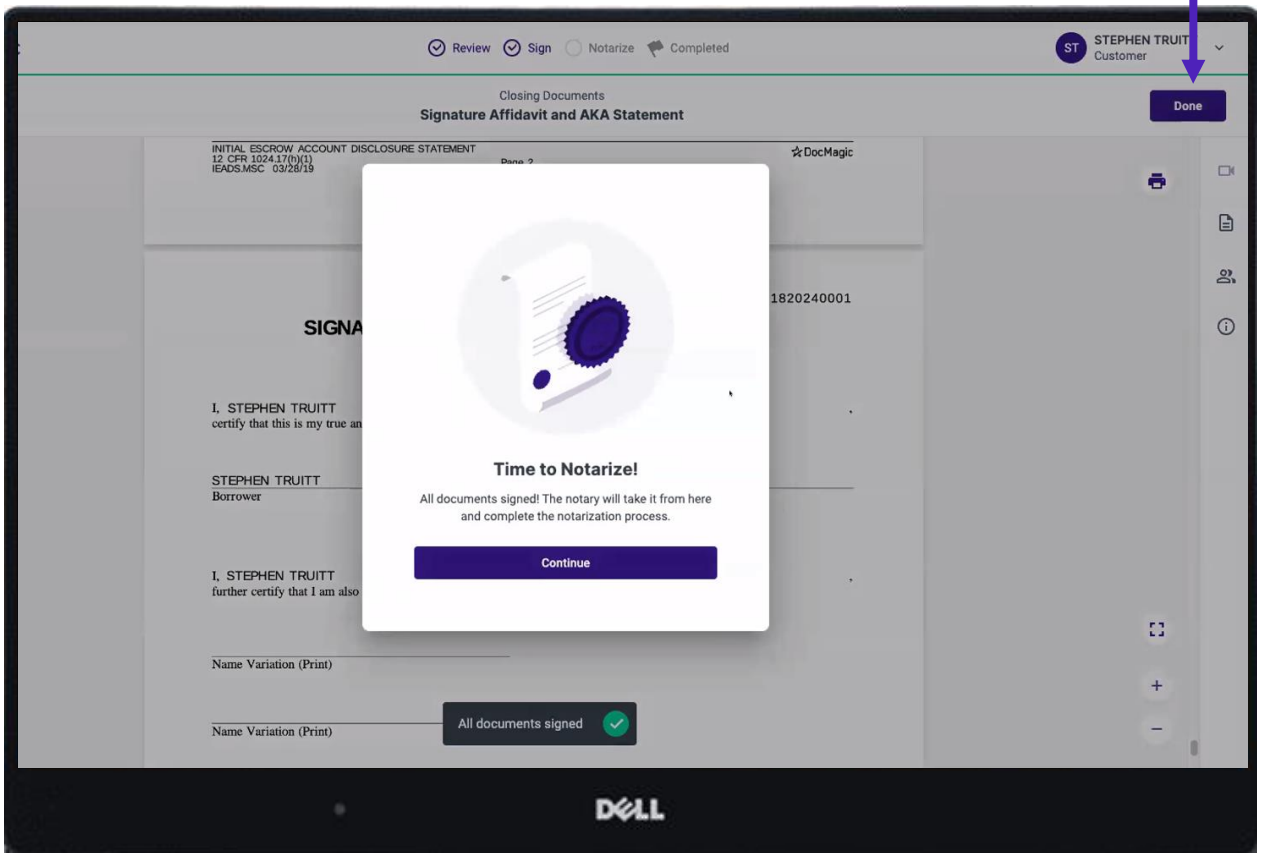
On the right side of the screen, there is a video feed of "JOHN SMITH" with a menu of options: Restart Meeting, Change Email Address, Withdraw Consent, Terms of Use, and Save & Exit. A "Refresh Documents" button is highlighted in a green box at the bottom right of the video feed. A purple arrow points from the text box above to the three dots in the video feed, and another purple arrow points from the text box below to the "Refresh Documents" button.

Click Refresh Documents.  
The changes should show.



# Applying Signer eSignatures

When the borrower is done signing, they will click Done and then Continue.

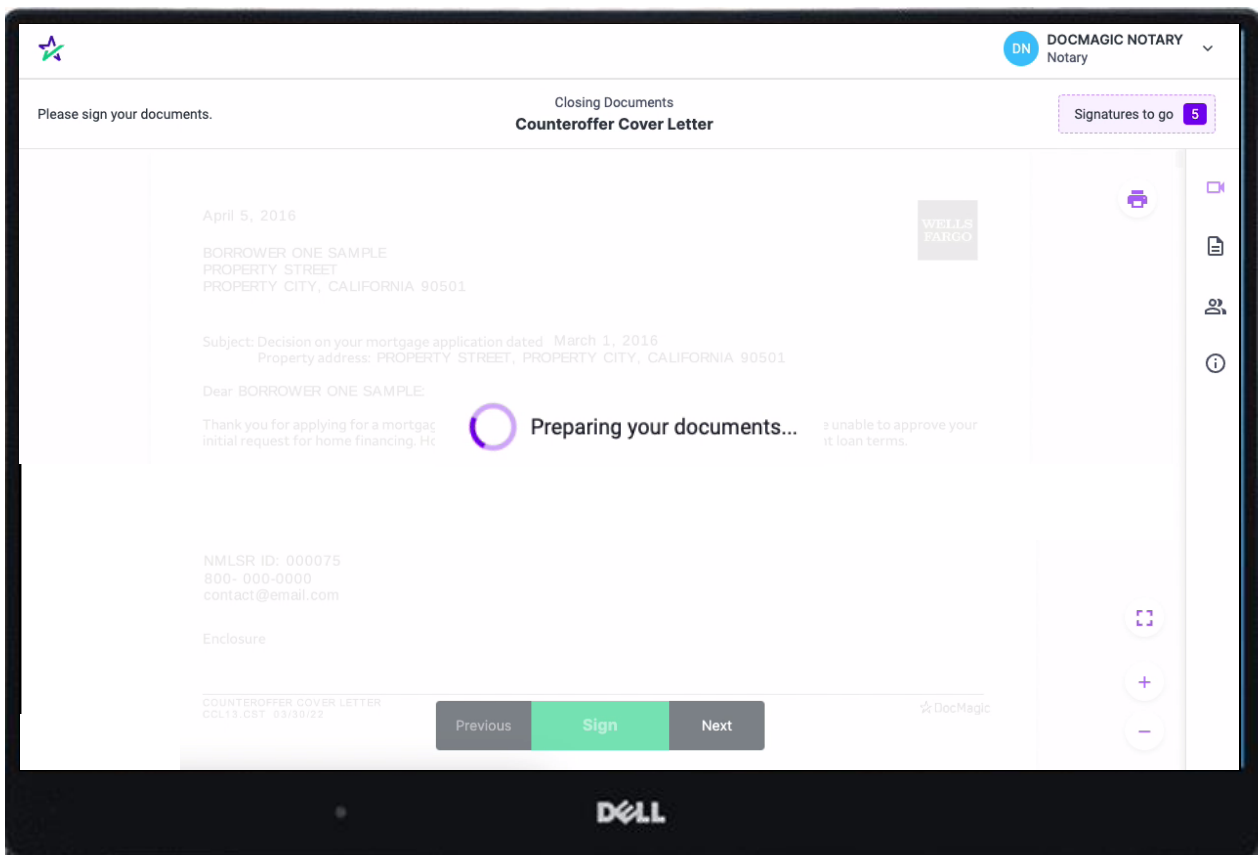


This will transfer control and signing ability back to the Notary who will then start the notarization process.



# Preparing Your Documents

After selecting Notarize, they will see this "Preparing your documents" loading screen.



The system will automatically take the Notary to the first document that needs to be notarized.



# Adding Signature, Seal, and more

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

Closing Documents  
**Signature Affidavit and AKA Statement** Done

State of \_\_\_\_\_  
County of Maricopa

Signed and sworn to (or affirmed) before me on the 28th day of March, 2024  
by STEPHEN TRUITT

This remote online notarization involved the use of communication technology.

*Deanna Thompson*  
03/28/24 10:42:28 AM PDT  
Signature of notarial officer  
Deanna Thompson  
Notary Public  
Title of office  
My commission expires: \_\_\_\_\_

DEANNA THOMPSON  
Notary Public - State of Arizona  
Maricopa County  
Commission # 617152  
My Commission Expires on Oct 27, 2025  
(Stamp)

All documents notarized ✓

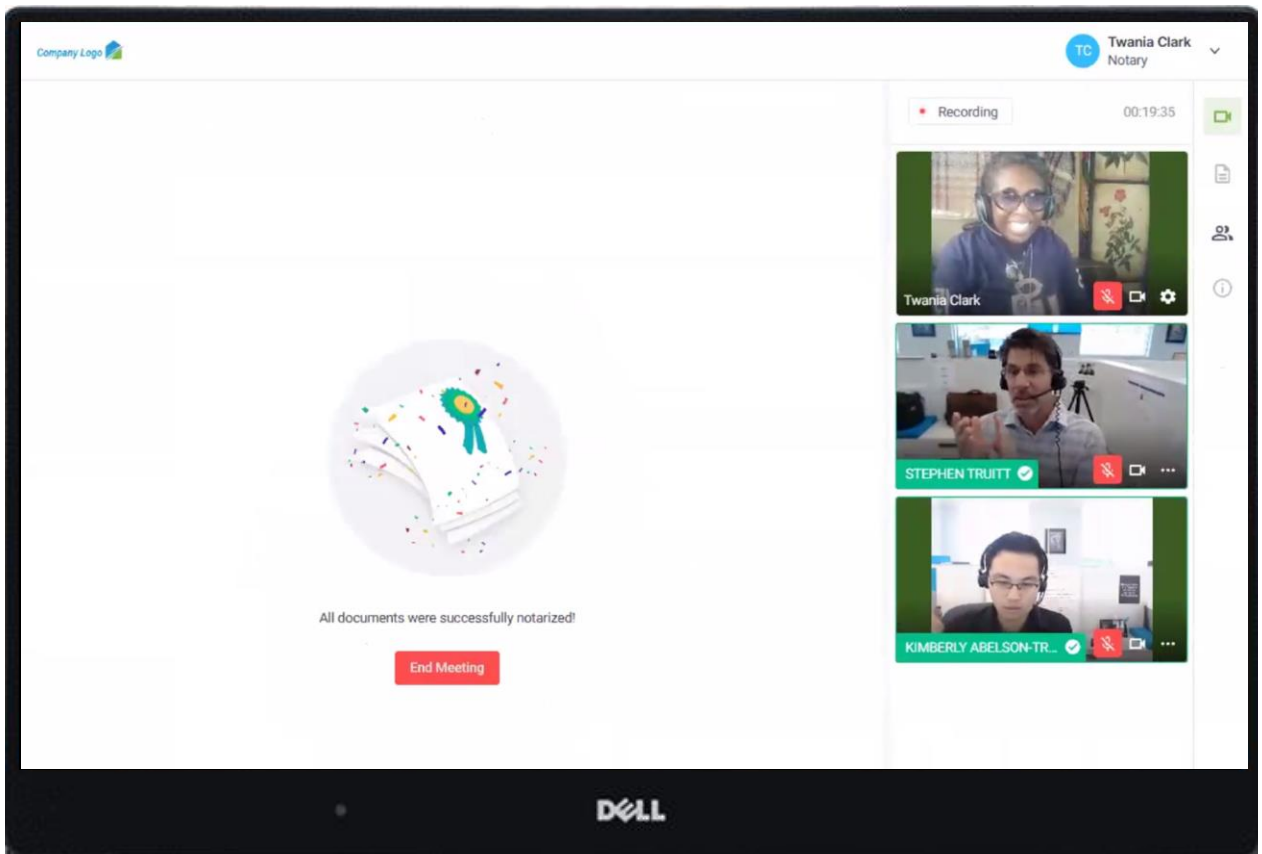
If there are multiple borrowers, they must be notarized one at a time and the notary will repeat the process.





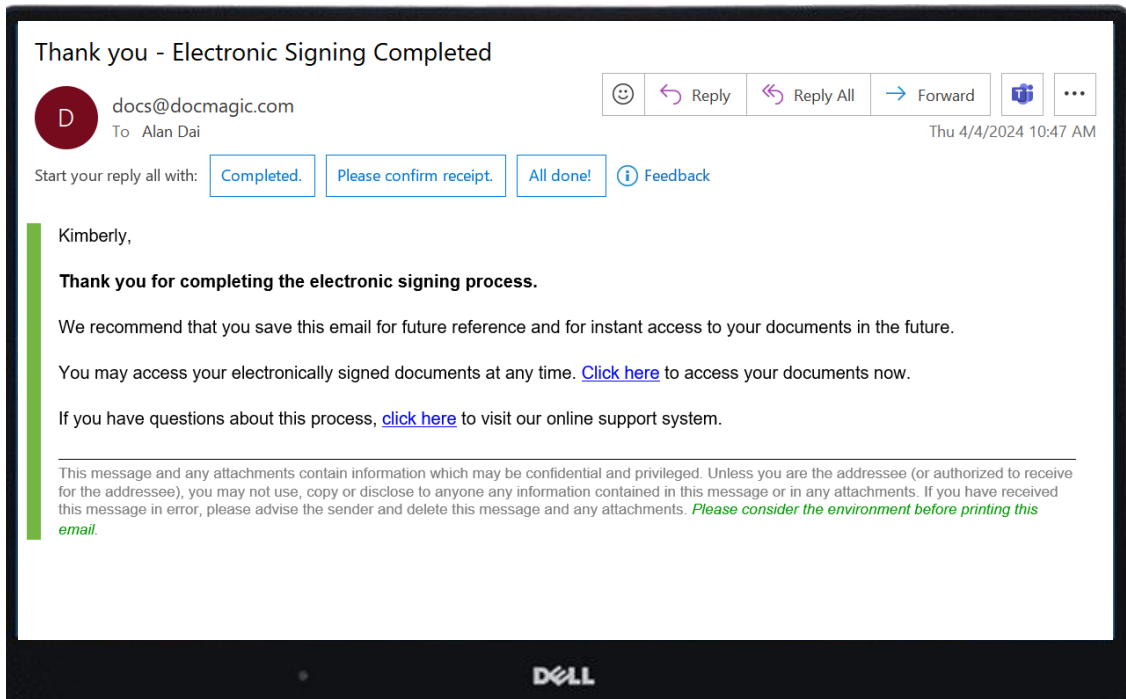
# Ending the Meeting

The process is complete once all the participants' and Notary's signatures have been captured. The meeting may now end.



# Email Confirmation

Notification emails are sent to all parties.



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



# eJournal

Back on their eClose Console the Notary can go to the eJournal tab and enter in the Notarial Services performed and their respective fees.

The screenshot displays the DocMagic eClose Console (Notary) interface. At the top, there is a navigation bar with the DocMagic logo and the text "eClose Console (Notary)". Below this, there are several tabs: "LOAN", "LENDER", "SETTLEMENT AGENT", and "COUNTDOWN TO CLOSING". The "eJournal" tab is highlighted with a green box. Below the tabs, there is a "Journal" section with a table of notarial services. The table has columns for "#", "Signer", "Notarization Date and Time", "Document Notarized", "\*Notarial Service", and "Fee". The first row shows a notarial service for "John Smith" on "November 9, 2021 • 10:32am PST". The "Document Notarized" column lists "MERS New Jersey Mortgage", "Occupancy and Financial Status Affidavit", and "Signature Affidavit and AKA Statement". The "\*Notarial Service" column lists "Acknowledgement", "Jurat", and "Affidavit". The "Fee" column lists "\$0.00" for each service. A green box highlights the "\*Notarial Service" and "Fee" columns. Below the table, there are "Cancel" and "Save" buttons.

#	Signer	Notarization Date and Time	Document Notarized	*Notarial Service	Fee
1	John Smith	November 9, 2021 • 10:32am PST	MERS New Jersey Mortgage Nov 9, 2021 • 10:32am PST	Acknowledgement	\$0.00
			Occupancy and Financial Status Affidavit Nov 9, 2021 • 10:32am PST	Jurat	\$0.00
			Signature Affidavit and AKA Statement Nov 9, 2021 • 10:32am PST	Affidavit	\$0.00

Please note this is NOT a charging service – its only for recording notes.



# eJournal

The notary journal also contains the audio and video of each RON signing session. This will be stored within the eJournal (console) under "Recordings" only for 90 days.

The screenshot displays the DocMagic eClose Console (Notary) interface. At the top, the header includes the DocMagic logo, the text "eClose Console (Notary)", and a user profile icon labeled "Doc". Below the header, there are navigation tabs for "Details", "eJournal", and "Action Log". The "eJournal" tab is active, showing a "Journal" section with a table of signing sessions. The first session is for "John Smith" on "December 15, 2021 • 1:40pm CST". Below the session header, there are sections for "Signer's Details", "Document Notarized", "Notarial Service", and "Fee". The "Signer's Details" section includes the signer's name, address, contact information, and signature. The "Document Notarized" section lists the documents being notarized. The "Notarial Service" section shows the type of service and the fee. The "Recordings" section is highlighted with a green border and contains a table with columns for "#", "File", and "Date Recorded". The first recording is "437477\_2021-12-15T19:35:38.012Z.mp4" recorded on "December 15, 2021 • 1:35pm CST". A blue arrow points from the "Download" link next to the recording to a text box below.

The best practice would be to save these materials right after the signing experience. Click here to download.



# Action Log

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

The screenshot displays the DocMagic eClose Console (Notary) interface. At the top, there's a navigation bar with the DocMagic logo and a user profile icon. Below this, there are four main sections: LOAN, LENDER, SETTLEMENT AGENT, and COUNTDOWN TO CLOSING. The LOAN section shows details like Loan #, Primary Borrower, Type, Package ID, and Worksheet #. The LENDER section shows Company, Contact, Email, and Phone. The SETTLEMENT AGENT section shows Company, Contact, Email, and Phone. The COUNTDOWN TO CLOSING section shows a timer for DAYS, HOURS, MINUTES, and SECONDS. Below these sections, there are tabs for Details, eJournal, and Action Log. The Action Log tab is selected and highlighted with a green box. Below the tabs is a table with the following data:

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

At the bottom of the Action Log table, there is a text input field with a green border and a button labeled "Add Internal Note To Action Log".

Notes may also be added at the bottom.





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 (Days: -, Hours: -, Minutes: -, Seconds: -). A 'Ready to Close' button is visible. Below these sections, there are tabs for 'Details', 'eJournal', and 'Action Log'. The 'Signers (2)' section contains a table with the following data:

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

Below the signers table, there is a 'Documents (16)' section with a table listing documents:

#	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	✓

The 'Open Signing Room' button for the Settlement Agent signer is highlighted with a red box. A red arrow points from the text box above to this button.



# eClose Console Confirmation

When all signed documents have been uploaded and all signatures, fields and Notary stamps have been collected, the Settlement Agent will see a fully completed column on the Right.

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





## Email Confirmation

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



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



# eJournal

Click on this tab to access the eJournal.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text "eClose Console (Settlement Agent)", and a user profile for "Byron". Below the navigation bar, there are four main sections: "LOAN", "LENDER", "SETTLEMENT AGENT", and "COUNTDOWN TO CLOSING". The "LOAN" section shows details for Loan # 16364819162, Primary Borrower John Smith, Type EClosing, Package ID 417659, and Worksheet # 16364819162. The "LENDER" section shows Company SAMPLE SONS L..., Contact Michael Morford, Email mikem@docmagic..., and Phone (555) 555-5555. The "SETTLEMENT AGENT" section shows Company Settlement Closing..., Contact Sally Settlement, Email strutt@docmagic.c..., and Phone (987) 555-4321. The "COUNTDOWN TO CLOSING" section shows a timer for 0 days, 1 hour, 26 minutes, and 43 seconds, with a date of Nov 9, 2021 (Tue) and time of 12:00pm PST. Below these sections, there are tabs for "Details", "eJournal", and "Action Log". The "eJournal" tab is highlighted with a green box. Below the tabs, there is a "Journal" section with a table of entries. The first entry is for Signer John Smith, Notarization Date and Time November 9, 2021 • 10:32am PST, and has a down arrow icon in a green box. Below the journal is a "Recordings" section with a table of entries. The first entry is for File 417659\_2021-11-09T18:27:54.132Z.mp4, Date Recorded November 9, 2021 • 10:27am PST.

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

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

Click on the down arrow to access the borrower's journal.



# eJournal

Use the dropdown menus to select the type of Notarial Service. Toggle choices by clicking on the box and using the up and down arrow keys.

DocMagic eClose Console (Settlement Agent) Byron

**LOAN** Loan #: 1636481916201  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 1636481916201 (...)

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

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: struitt@docmagic.c...  
Phone: (987) 555-4321

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

Details eJournal Action Log

Journal

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

**Signer's Details**  
John Smith  
222333 Peachtree Place  
Atlanta, GA 30318

**Contact Information**  
Mobile: (800) 649-1362  
Home: (800) 649-1362  
struitt@docmagic.com

**Signature**  
*John Smith*

**Identification Details**  
Driver's License: 123456789 • Exp. 2/20/2025

**Document Notarized**

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

Cancel Save

Enter the fee for each Notarial Service performed here.



# eJournal

The notary journal contains the audio and video of each RON signing session.

DocMagic eClose Console (Settlement Agent) Byron

Package ID: 437477  
Worksheet #: 2192 (Version: 1)  
Email: leah@docmagic.com Phone: (817) 881-2003  
Email: leah@docmagic.com Phone: (987) 555-4321  
Date: Dec 16, 2021 (Thu) Time: 7:00pm CST

Details eJournal Action Log

### Journal

#	Signer	Notarization Date and Time
1	John Smith	December 15, 2021 • 1:40pm CST

**Signer's Details**  
John Smith  
222333 PEACHTREE PLACE  
ATLANTA, GA 30318

**Contact Information**  
Mobile: (562) 652-2578  
Home: (502) 767-8509  
shandi@docmagic.com

**Signature**

**Identification Details**  
Driver's License: 123456 • Exp. 4/14/2022

**Document Notarized**

MERS New Jersey Mortgage Dec 15, 2021 • 1:39pm CST	*Notarial Service Acknowledgement	Fee \$0.00
Signature Affidavit and AKA Statement Dec 15, 2021 • 1:40pm CST	Affidavit	\$0.00

Cancel Save

### Recordings

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

Download

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



# eJournal

You must print out this journal, download and save the video internally before 90 days.


DocMagic eClose Console (Settlement Agent) Byron

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**Document Notarized**  
MERS New Jersey Mortgage  
Dec 15, 2021 • 1:39pm CST  
Signature Affidavit and AKA Statement  
Dec 15, 2021 • 1:40pm CST

**\*Notarial Service**  
Acknowledgement  
Affidavit

**Fee**  
\$0.00  
\$0.00

Cancel Save

### Recordings

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

Download

The best practice would be to store these materials right after the signing experience. Click here to download.



# Action Log

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

DocMagic eClose Console (Settlement Agent) Byron

**LOAN** Loan #: 1638481916201  
Primary Borrower: John Smith  
Type: EClosing  
Package ID: 417659  
Worksheet #: 1638481916201 [...]

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

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

**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.

