



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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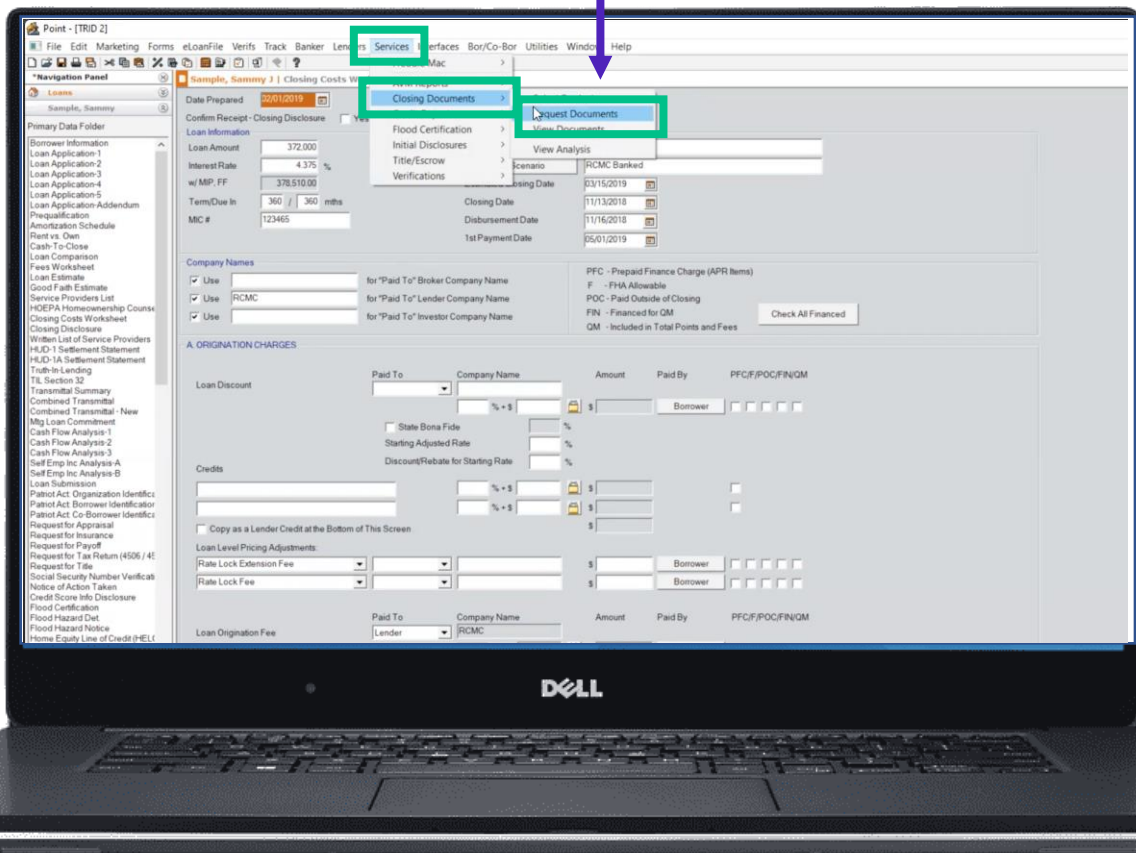




Processing Closing Documents in LOS

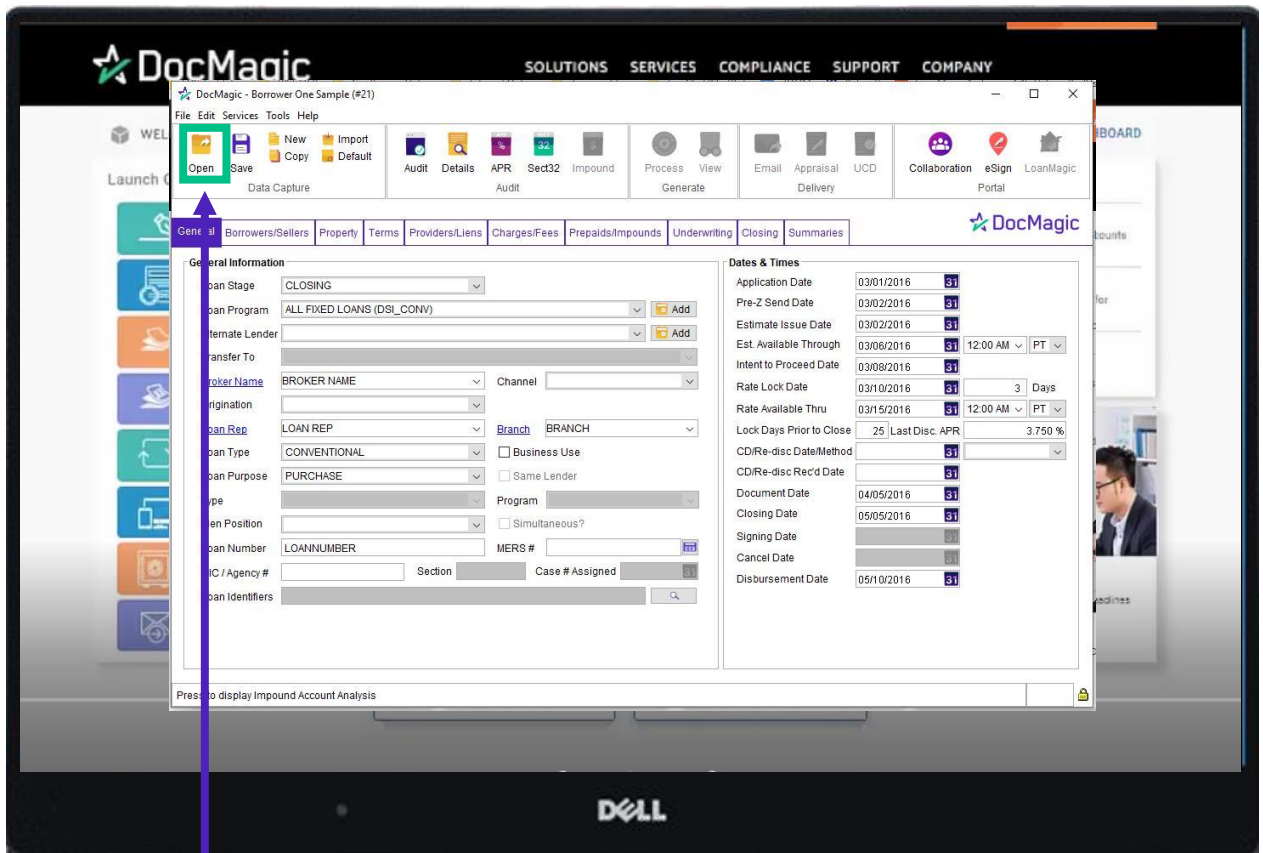
Closing Documents in Your LOS

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

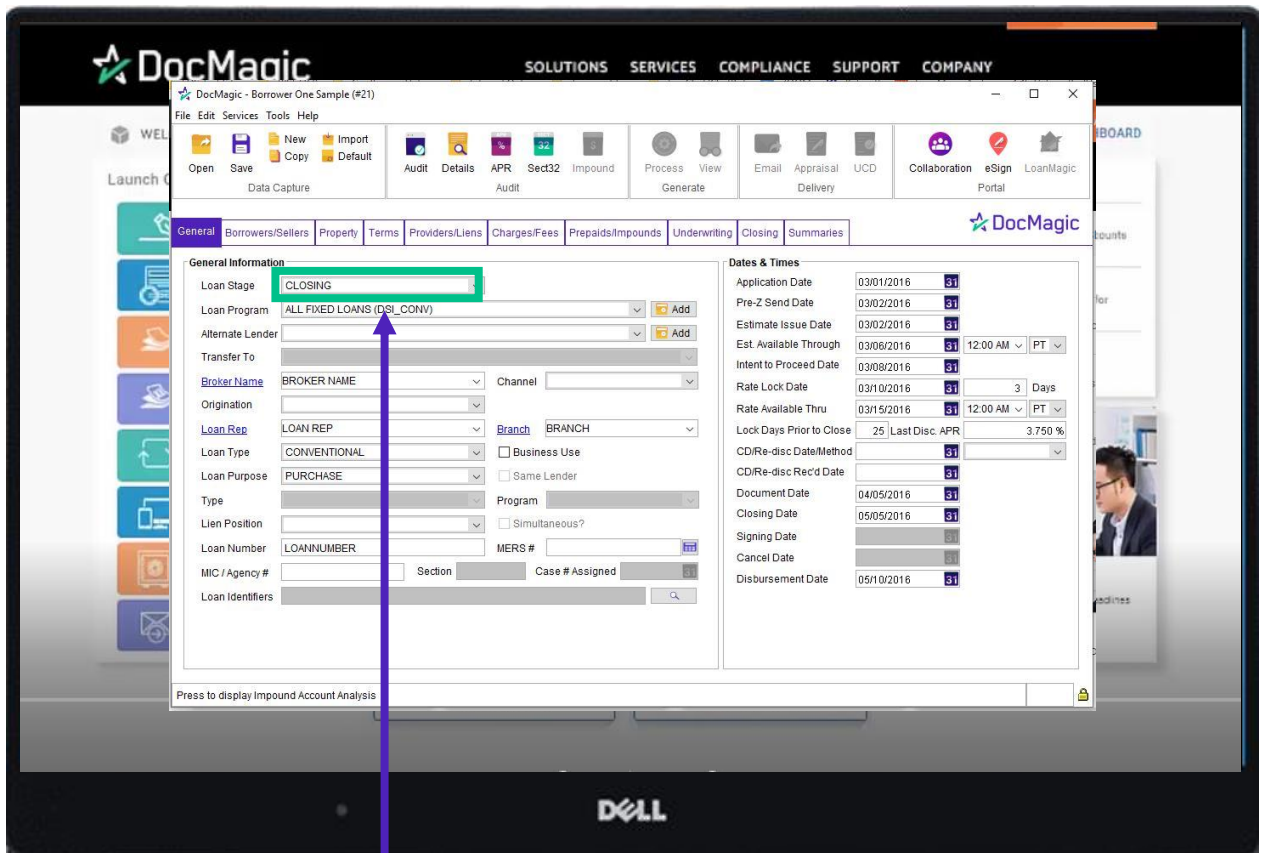
- Application Date: 03/01/2016
- Pre-Z Send Date: 03/02/2016
- Estimate Issue Date: 03/02/2016
- Est. Available Through: 03/06/2016 12:00 AM PT
- Intent to Proceed Date: 03/08/2016
- Rate Lock Date: 03/10/2016 3 Days
- Rate Available Thru: 03/15/2016 12:00 AM PT
- Lock Days Prior to Close: 25 Last Disc 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.

Loan Detail Report

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

DETAILS

LENDER INFO

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

LOAN IDENTIFIERS

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:	

IMPORTANT DATES

Application Date:	12/22/2021	Close Date:		CDR Date:	01/25/2022
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Processing Documents – Hybrid 3

Process the Document set.

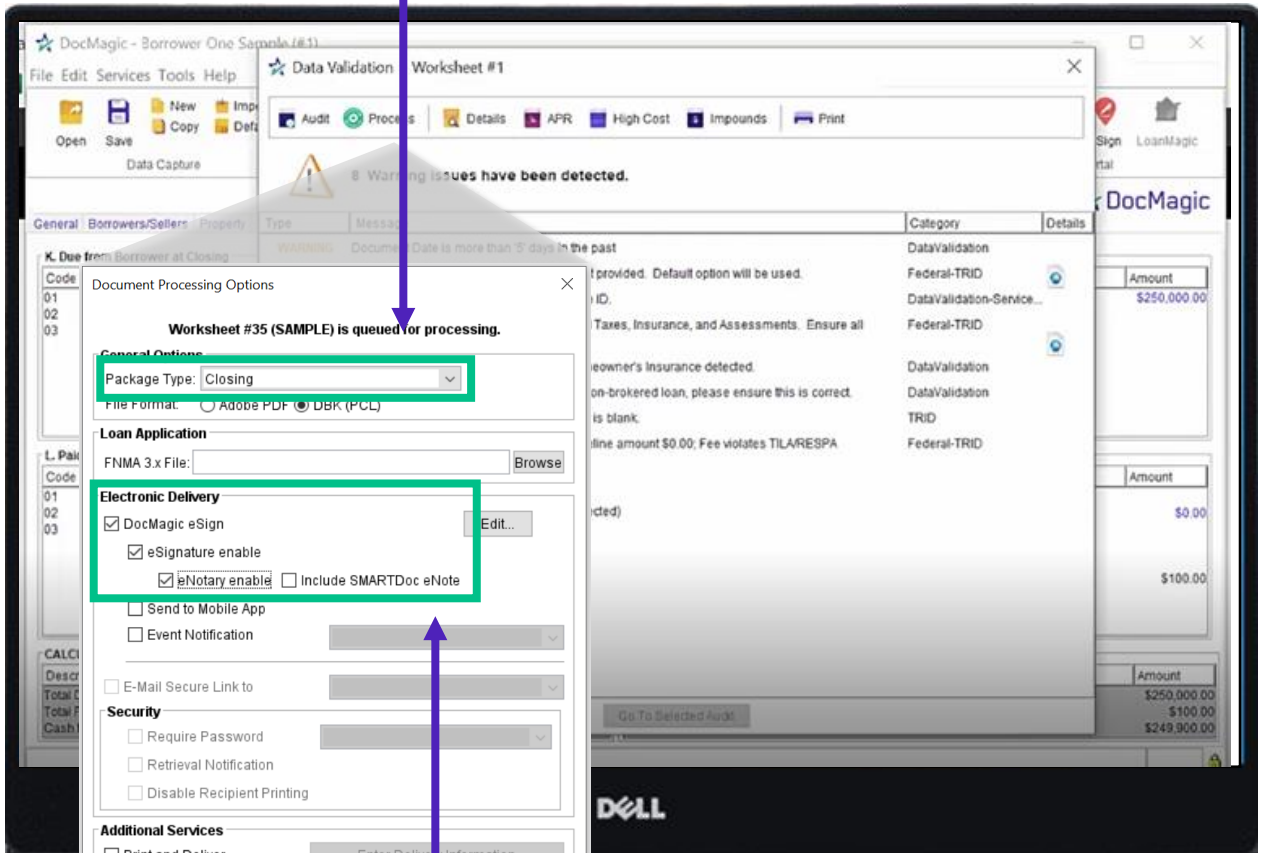
The screenshot shows the DocMagic software interface. A window titled "Data Validation - Worksheet #1" is open, displaying a table of warning issues and messages. The "Process" button in the toolbar is highlighted with a green box. A blue arrow points from the text "Process the Document set." to this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

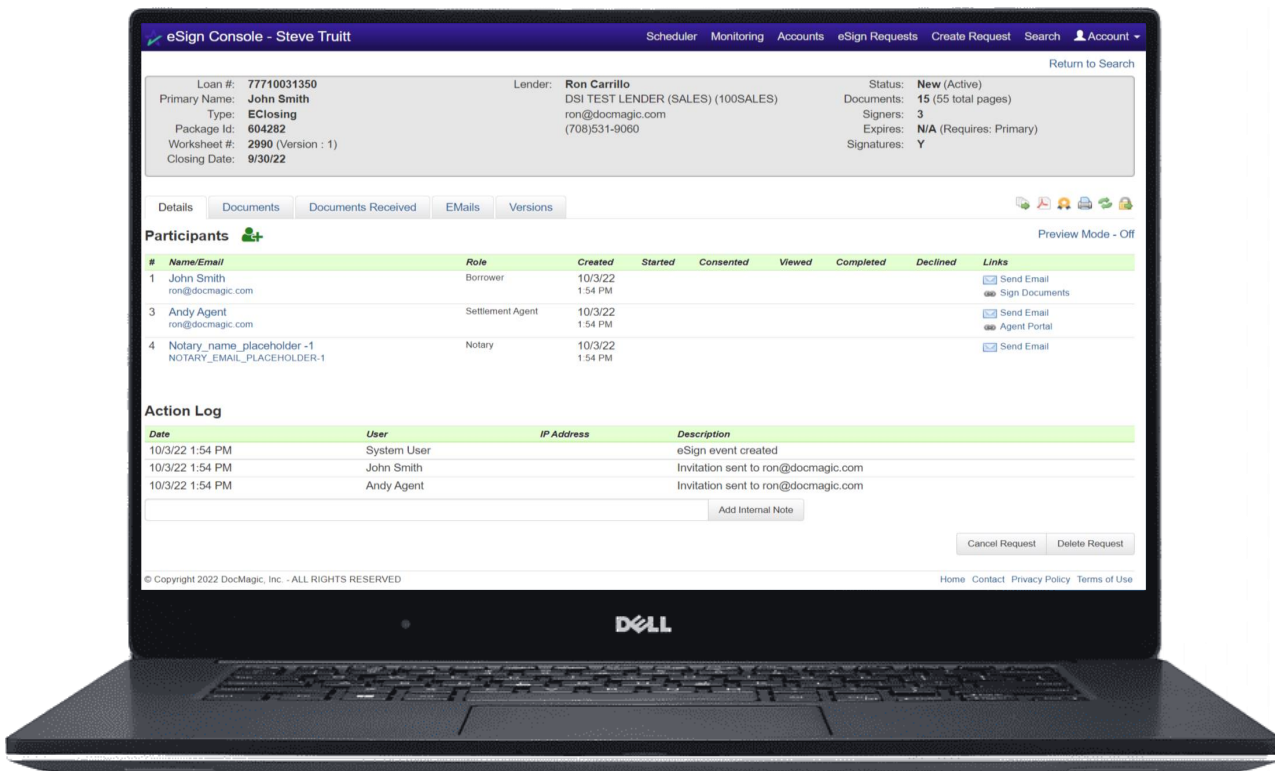




Lender Portal

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 'eSign Console - Steve Truitt', '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 Table:** 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 in green. The 'Documents' section contains a table with the following columns: Document Name, ClickSign, Page(s), Mark(s), Signer(s), Completed, Sigreq, Document Id | Document Id, Filename, Delete, and Operation.

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

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

You can check the status of the signature process here.



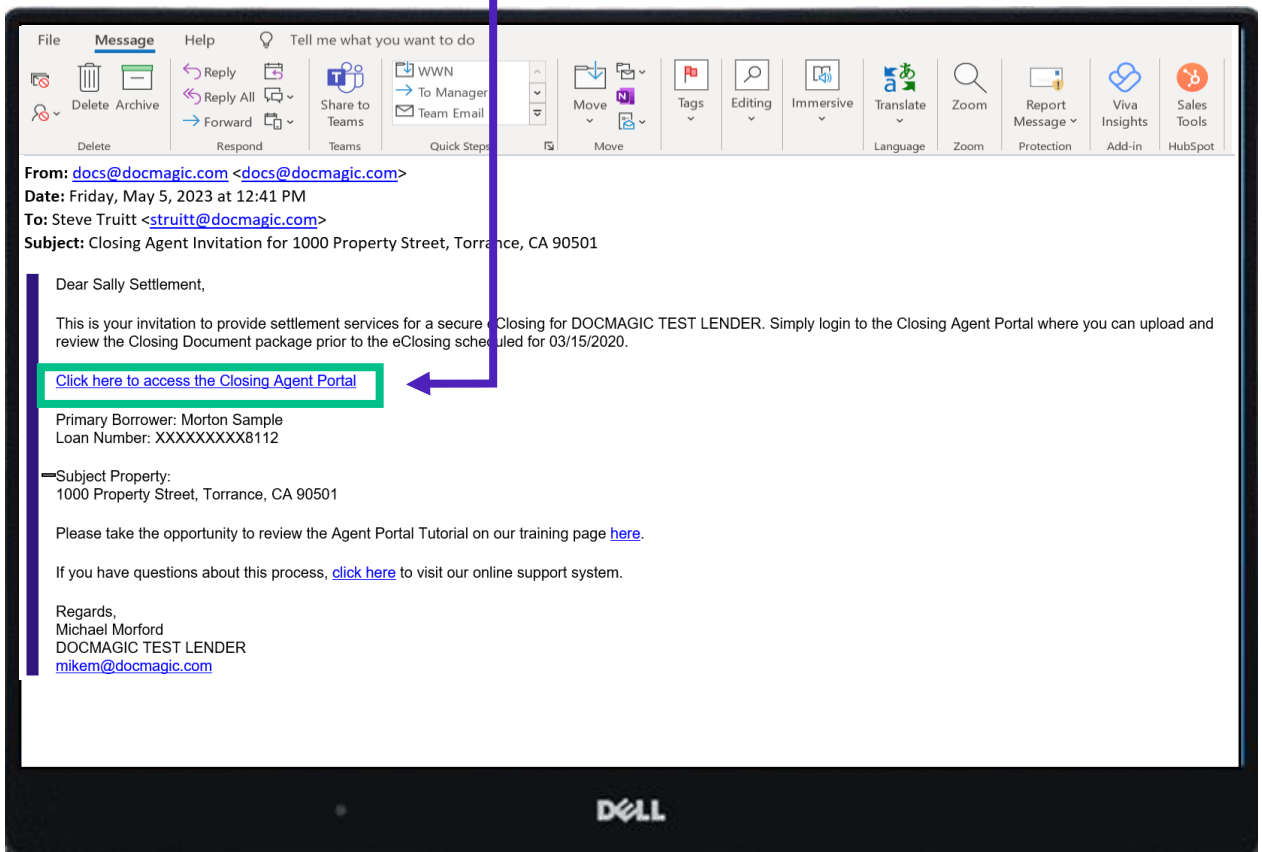


Settlement Agent Process

Settlement Agent Invitation Email

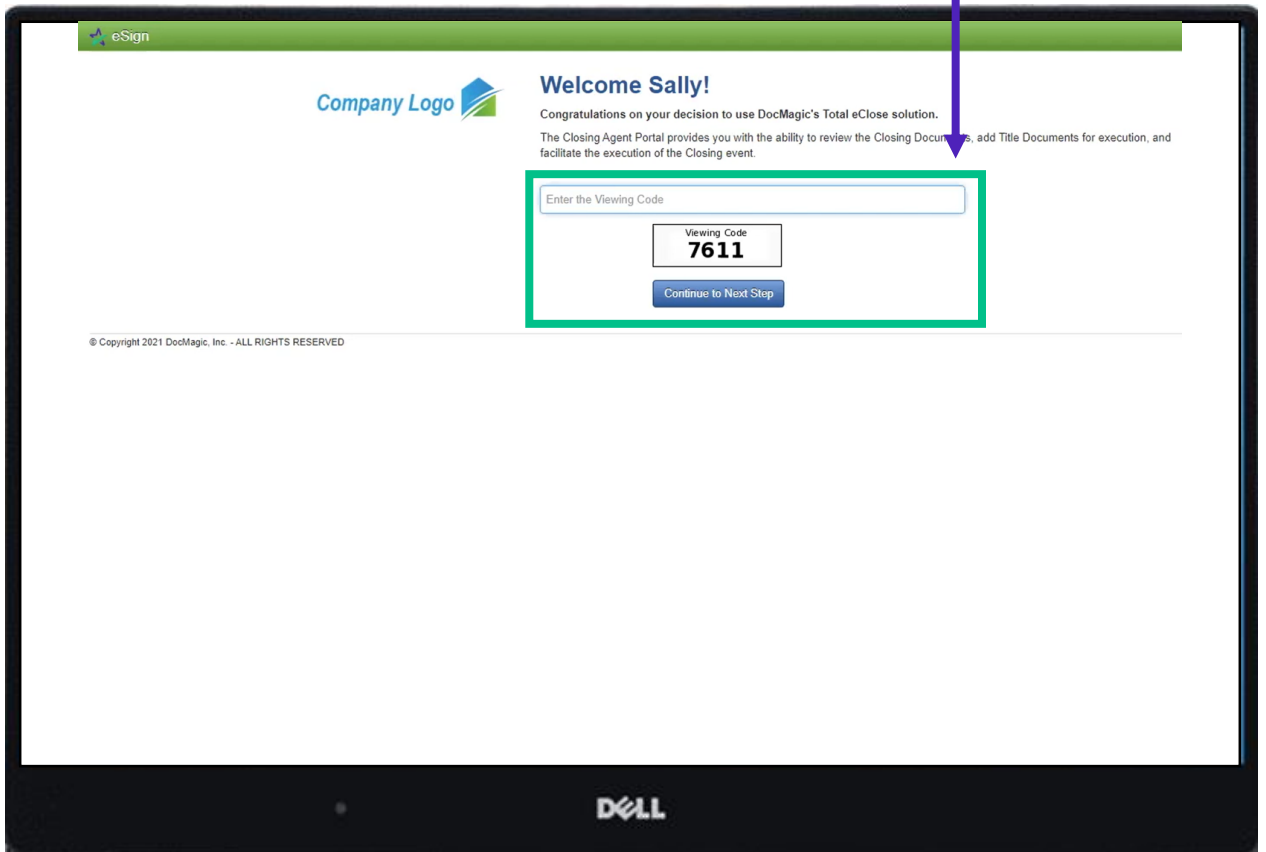
The Settlement Agent will receive an invitation email when the lender creates the eClose event.

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.



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	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15) [Add](#) [Edit](#) [Print](#) [Share](#) [Refresh](#) 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



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	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15) [Preview Mode](#)

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

DELL



Help Button

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

DocMagic eClose Console (Settlement Agent)

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

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

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

Dashboard
My Account
Preferences
Contact Us
Help
Sign Out

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	📧 ⓪	📷 ⓪
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

Buttons for "Cancel", "Delete", and "Save" are visible at the bottom of the modal. In the background, a "Signers (2)" table is partially visible, with "Erica Sample" highlighted. The table has columns for "#", "Signer Name", and "Email".

#	Signer Name	Email
1	Erica Sample	erica.sample@example.com
2	Sally Settlement	sally.settlement@exampl



Adding Participants

Click on the Silhouette Icon to add a participant.

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

The screenshot displays the DocMagic eClose Console interface. A central dialog box titled "Add Participant" is open, prompting the user to "Add the participant's information below." The dialog contains the following fields: First Name, Last Name, Email, Phone Number (with a format guide: () - - - - -), Access Code, and Role (with a dropdown menu labeled "Select Role"). At the bottom of the dialog are "Cancel" and "Add" buttons, with the "Add" button highlighted by a green box. In the background, the console shows a "LOAN" summary with details like Loan #, Primary Borrower, Type, Package ID, and Worksheet #. To the right, there is a "LENDER" section and a "COUNTDOWN TO CLOSING" timer showing 6 days, 19 hours, and 2:00am PDT. Below the loan details is a "Signers (2)" list with two entries: Erica Sample and Sally Settlement. At the bottom, there is a "Documents (15)" table with columns for document name, page count, and completion status.

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

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



Notary - Signer's Tab

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

DocMagic eClose Console (Settlement Agent) Sally ▾

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

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

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

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

Signers (2) [Assign Notary](#)

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

Documents (15) [Preview Mode](#)

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

DELL



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	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15) [Preview Mode](#)

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

DELL



Notary - Signer's Tab

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

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text 'eClose Console (Settlement Agent)', and a user profile for 'Sally'. 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: DOSI TEST LENDER (SALES), Contact: Michael Morford, Email: mmikem@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. The 'Notary Type / Closing Date - Time' column for the first signer is highlighted with a red box and contains the value '3/25/2021 - 12:00am'. A blue arrow points from the text box above to this cell.
- Documents (15)**: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. The documents listed are: 1. Uniform Residential Loan Application (9 pages, 1 signer, completed), 2. MERS California Deed of Trust (16 pages, 2 signers, completed), 3. Specific Closing Instructions (3 pages, 2 signers, completed), 4. California Hazard Insurance Disclosure (1 page, 1 signer, completed), 5. Hazard Insurance Authorization and Requirements (2 pages, 1 signer, completed), 6. Borrower Consent to the Use of Tax Return Information (1 page, 1 signer, completed).



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 highlighted in a green box and set to 'ON'. A blue arrow points from the text box above to this toggle.

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

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



Documents Section

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

The screenshot displays the DocMagic eClose Console interface. At the top, the header shows 'DocMagic eClose Console (Settlement Agent)' and the user 'Sally'. Below the header, there are sections for 'LOAN' and 'LENDER' details, a 'COUNTDOWN TO CLOSING' timer, and a 'Signers (2)' table. The 'Documents (15)' section is highlighted with a green border and contains a table of documents to be executed.

#	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

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



Documents Section

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

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 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: 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. A green box highlights this table.

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



Documents Section

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

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

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

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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 options.
- Documents (15)** section: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed status.

A blue arrow points from the text box to a document icon button located in the 'Documents (15)' section header.

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

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



Adding Documents

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

The screenshot displays the DocMagic eClose Console interface. At the top, the user is identified as Sally. The main area shows loan details for Loan # 777-1616630796081, with Primary Borrower Erica Sample and Lender DSI TEST LENDER (SALES). A 'COUNTDOWN TO CLOSING' widget shows 0 days, 0 hours, 0 minutes, and 0 seconds. A 'Ready to Close' button is visible. An 'Open' file dialog box is overlaid on the screen, showing the Desktop location. The file 'AZACPRS.TTL.pdf' is selected. In the background, a document upload table is partially visible, showing columns for 'Verify / Status', 'Status', and 'eSign'. A 'Browse' button is highlighted with a green box, and a blue arrow points from the text box above to this button.

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".

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.

Below these sections are tabs for "Details", "eJournal", and "Action Log", along with a "Ready to Close" button.

The "Signers (2)" section contains a table with 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_placehold... 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"/>

The "Documents (15)" section is highlighted with a green border and contains a table with the following data:

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

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)

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

California Deed of Trust (MERS)
Prepare documents for signing.

BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION

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

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

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

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

Signature: John Smith

Borrower: JOHN SMITH Date: _____ Borrower: _____ Date: _____

Previous Page Next Page

Tags

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



eJournal

Click on this tab to access the eJournal.

The screenshot shows 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 are four main sections: 'LOAN', 'LENDER', 'SETTLEMENT AGENT', and 'COUNTDOWN TO CLOSING'. The 'LOAN' section displays details for Loan # 163648191601, Primary Borrower John Smith, Type EClosing, Package ID 417659, and Worksheet # 163648191601 (...). The 'LENDER' section shows Company SAMPLE SONS L..., Contact Michael Morford, Email mikem@docmagic..., and Phone (555) 555-5555. The 'SETTLEMENT AGENT' section shows Company Settlement Closing..., Contact Sally Settlement, Email struitt@docmagic.c..., and Phone (987) 555-4321. The 'COUNTDOWN TO CLOSING' section shows a timer for Days, Hours, Minutes, and Seconds, with a date of Apr 19, 2023 (Wed) and time of 12:00am PDT. Below these sections are tabs for 'Details', 'eJournal', and 'Action Log'. The 'eJournal' tab is highlighted with a green box. The 'Journal' table below shows one entry for John Smith on November 9, 2021, with a dropdown arrow in the right column. The 'Recordings' table below shows one recording file for 417659_2021-11-09T18:27:54.132Z.mp4 on November 9, 2021, with a download icon in the right column. The Dell logo is visible at the bottom of the monitor frame.

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](#)

DELL

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 #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER**: Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikiem@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 options.
- Documents (15)**: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed status.

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.

#	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.settlementi@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	✓

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 'Signers (2)' table lists:

#	Signer Name / Email	Role	Notary Name	Email
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placehold...	NOTARY_EMAIL_PLACE...
2	Sally Settlement sally.settlmeni@examp...	Settlement Agent	Inassigned	

Below the signers, the 'Documents (15)' list includes:

- 1 Uniform Residential Loan Application
- 2 MERS California Deed of Trust
- 3 Specific Closing Instructions
- 4 California Hazard Insurance Disclosure
- 5 Hazard Insurance Authorization and Requirements
- 6 Borrower Consent to the Use of Tax Return Information

An inset window on the right shows a document cover sheet with the following text:

IMPORTANT

YOU MUST USE THIS AS YOUR COVER SHEET.

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

INSTRUCTIONS

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

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

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



Wet-sign Options

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

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent named Sally. The main content area shows a list of 14 documents 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 has a green checkmark in the 'Completed' column. A blue arrow points from the text box above to this row.

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



Assign a Notary

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

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

- Notary Provider:** A dropdown menu with "Select" as the current 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.

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

Buttons: Cancel, Assign Notary



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 [] PM 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**
WVN

***Notary Type**
 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 America/Los Angeles

Buttons for "Cancel" and "Assign Notary" are visible at the bottom of the modal. The background shows a "TO CLOSING" timer at 6 hours, 41 minutes, and 17 seconds, and a list of documents with their completion status.



Assign a Notary

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

DocMagic eClose Console (Settlement Agent) Sally

Assign / Notify Notary

***Notary Provider** NotaryCam

***Notary Type** **Required*

In Person

Remote Online Notary

Signers

#	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 America/Los Angeles

Cancel Assign Notary

TO CLOSING

HOURS: 6 MINUTES: 41 SECONDS: 17

Time: 12:00am PDT

Ready to Close

Assign Notary

Status eSign

● Not Started Open Signing Room

● Ready to Sign Open Signing Room

Preview Mode ON

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

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 bell icon.
- Signers (2):** A table listing two signers: Erica Sample (Borrower) and Sally Settlement (Settlement Agent). The 'Ready to Close' button is highlighted with a red box, and a red arrow points from the text above to it.
- Documents (16):** A table listing 16 documents, including 'Uniform Residential Loan Application', 'MERS California Deed of Trust', 'Specific Closing Instructions', 'California Hazard Insurance Disclosure', 'Hazard Insurance Authorization and Requirements', and 'Borrower Consent to the Use of Tax Return Information'.

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



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
		MD	

RON Capable **Search**

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

Request Summary

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

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

Cancel **Request Notary Services**

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



Assign a Notary

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

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

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

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 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**

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:

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

Signers (2) section:

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

Documents (16) section:

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

A blue arrow points from the text box above to the "Ready to Close" button in the interface.

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 a user profile for 'Sally'. The main content area is divided into several sections:

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

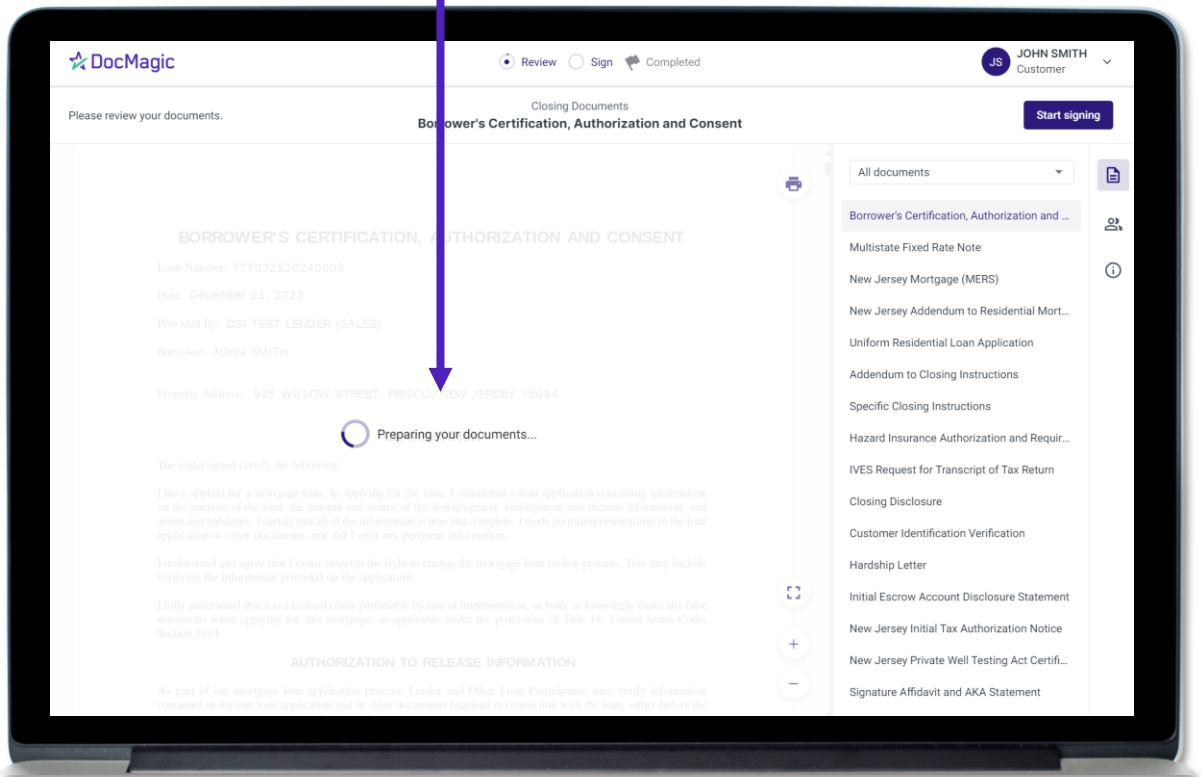
The screenshot shows a laptop displaying the DocMagic login interface. The page has a dark blue background. At the top, the DocMagic logo is visible. Below it, the text reads "Welcome Michael Sample!". A message states: "To begin the review and signing of your documents, please complete the following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

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



Preparing Your Documents

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

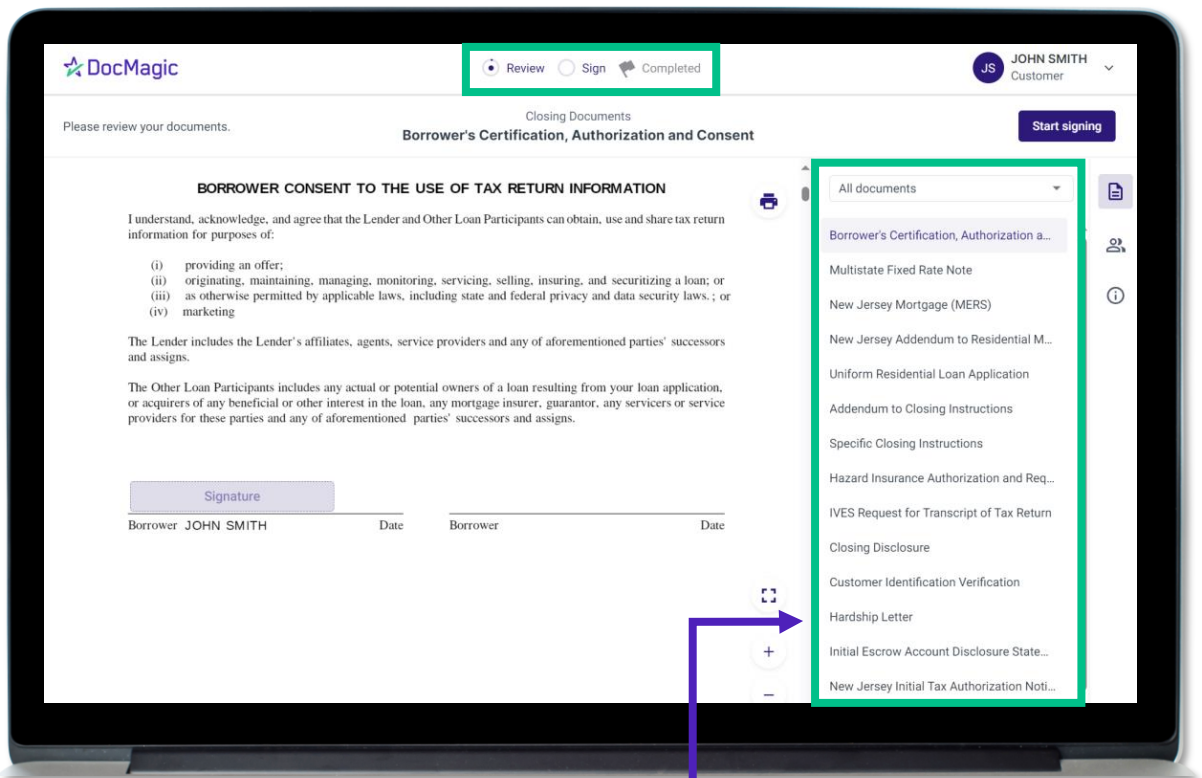


The system will automatically take you to the first document that needs to be signed.



Page Features

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

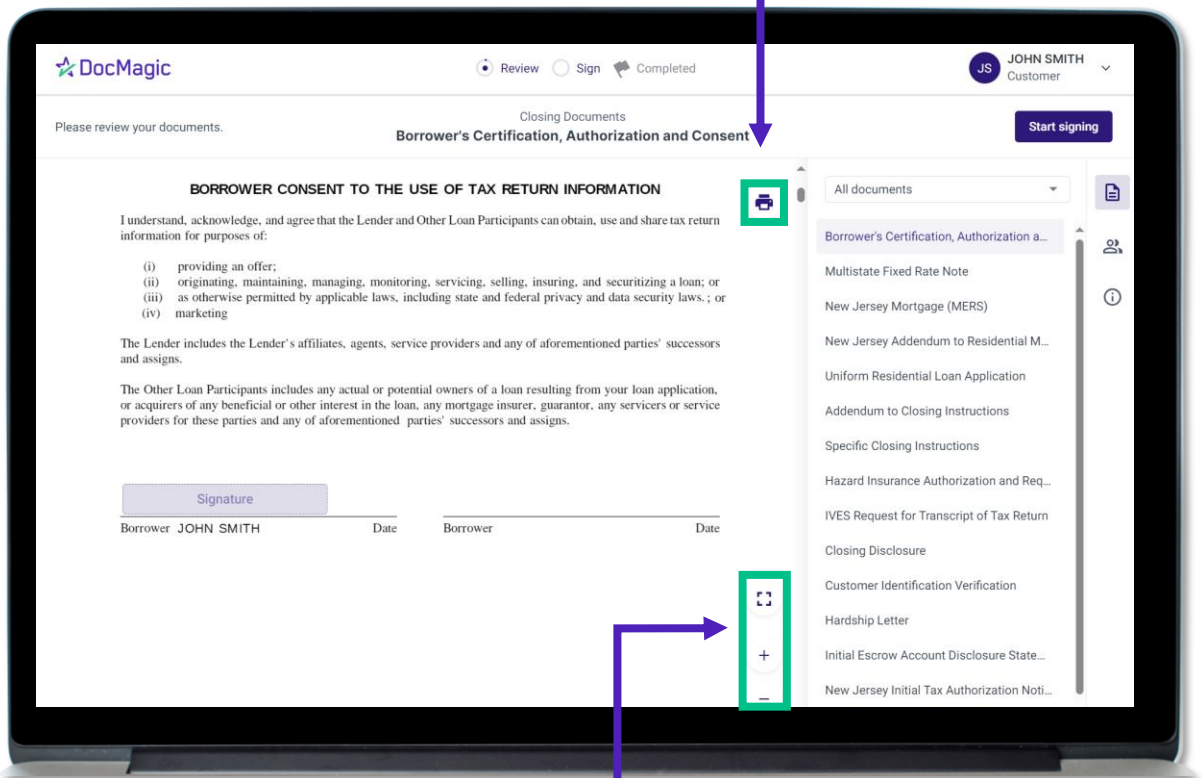


By default, all documents that need to be signed are listed in this column on the right. You can filter this column by documents that need to be ink signed or notarized from the dropdown at the top.



Page Features

The print icon allows you to print the documents.

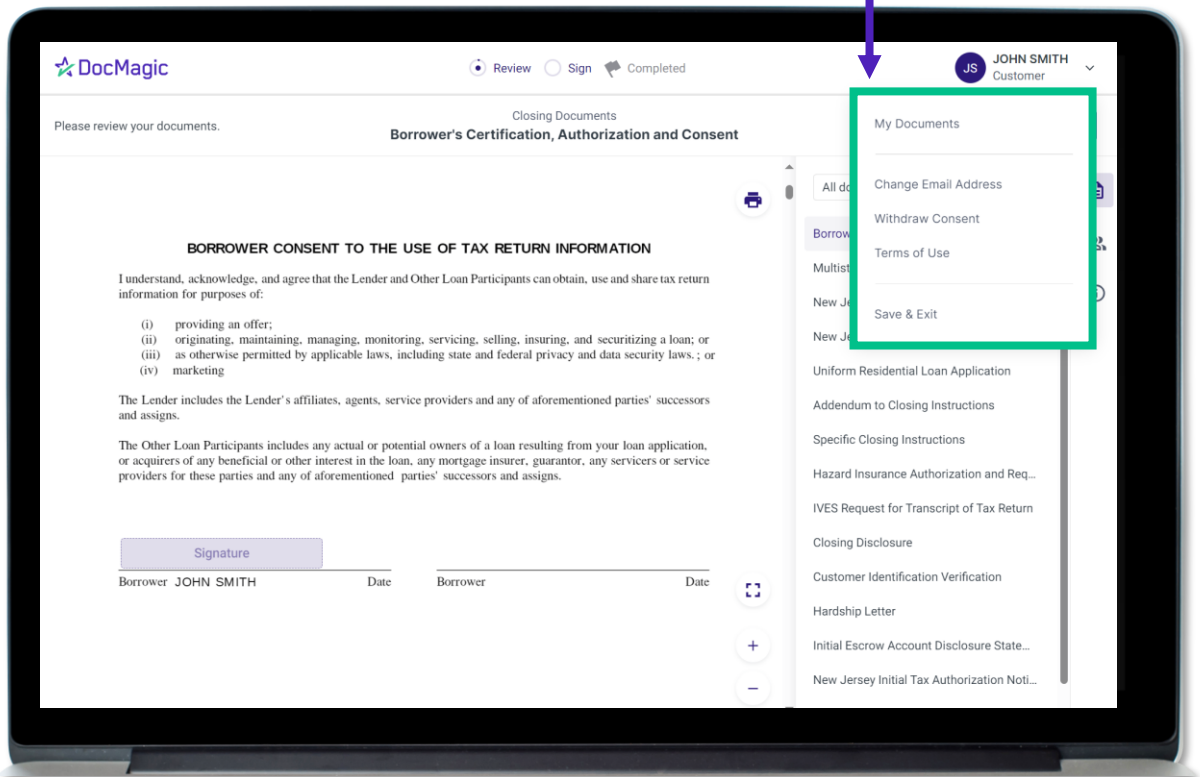


You can expand the signing window and increase or decrease the zoom levels.

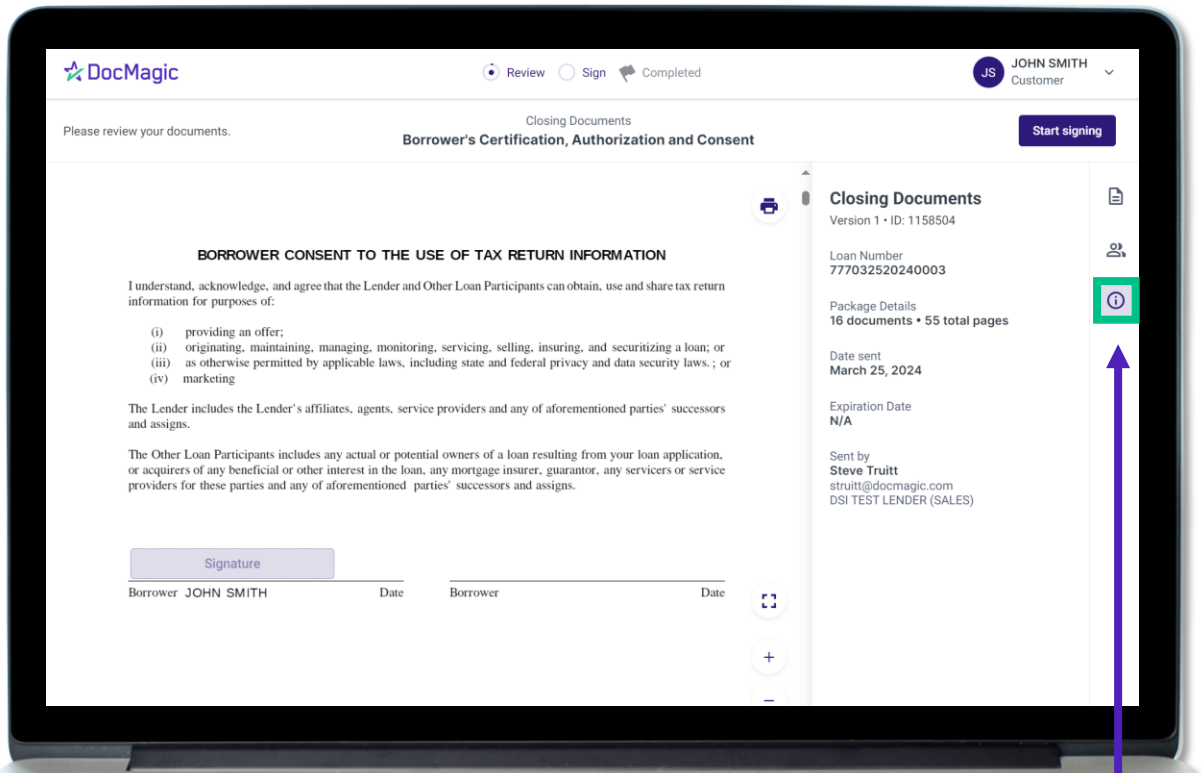


Borrower Information

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



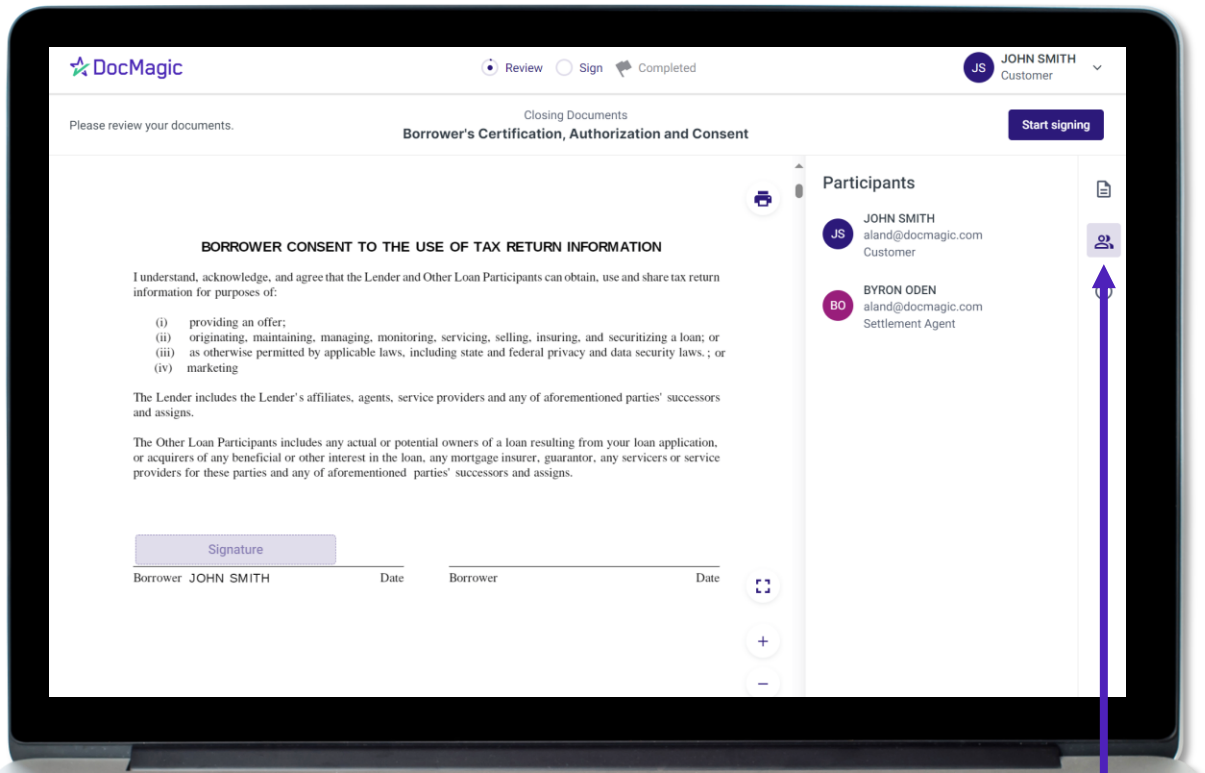
Page Features



Click the information icon to see document package metadata.



Participants

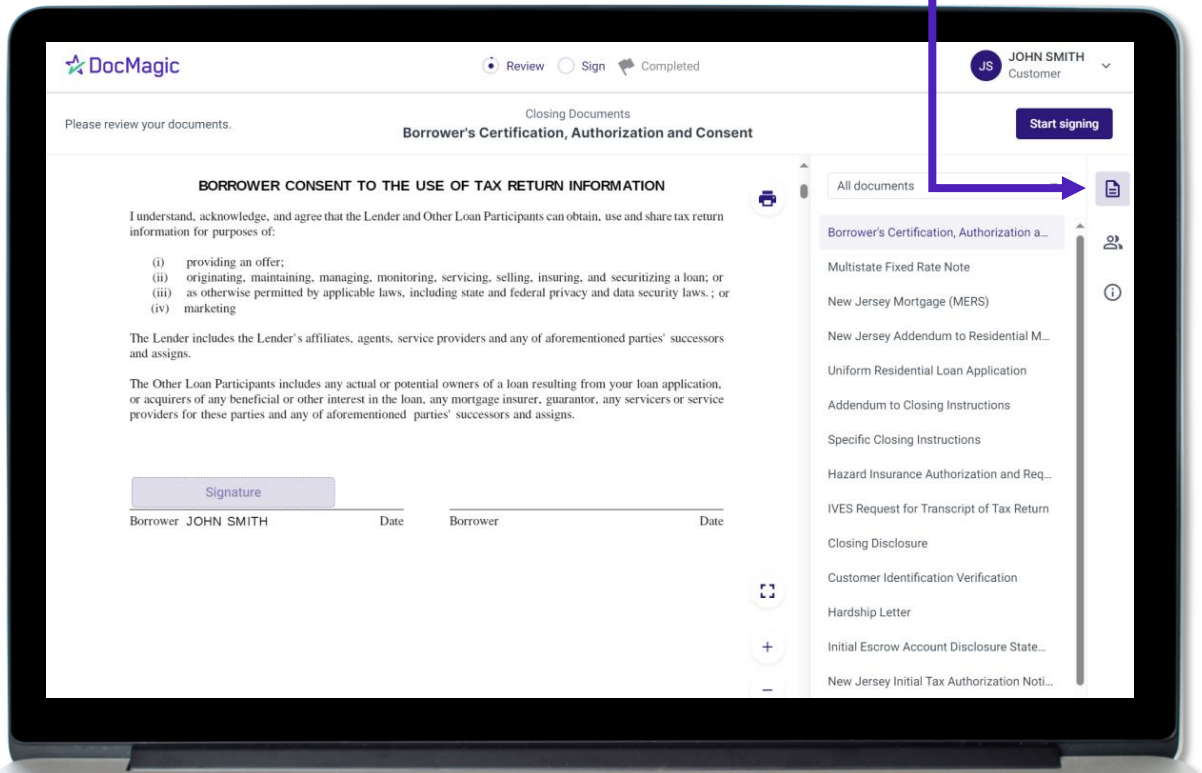


Click here to view participants.



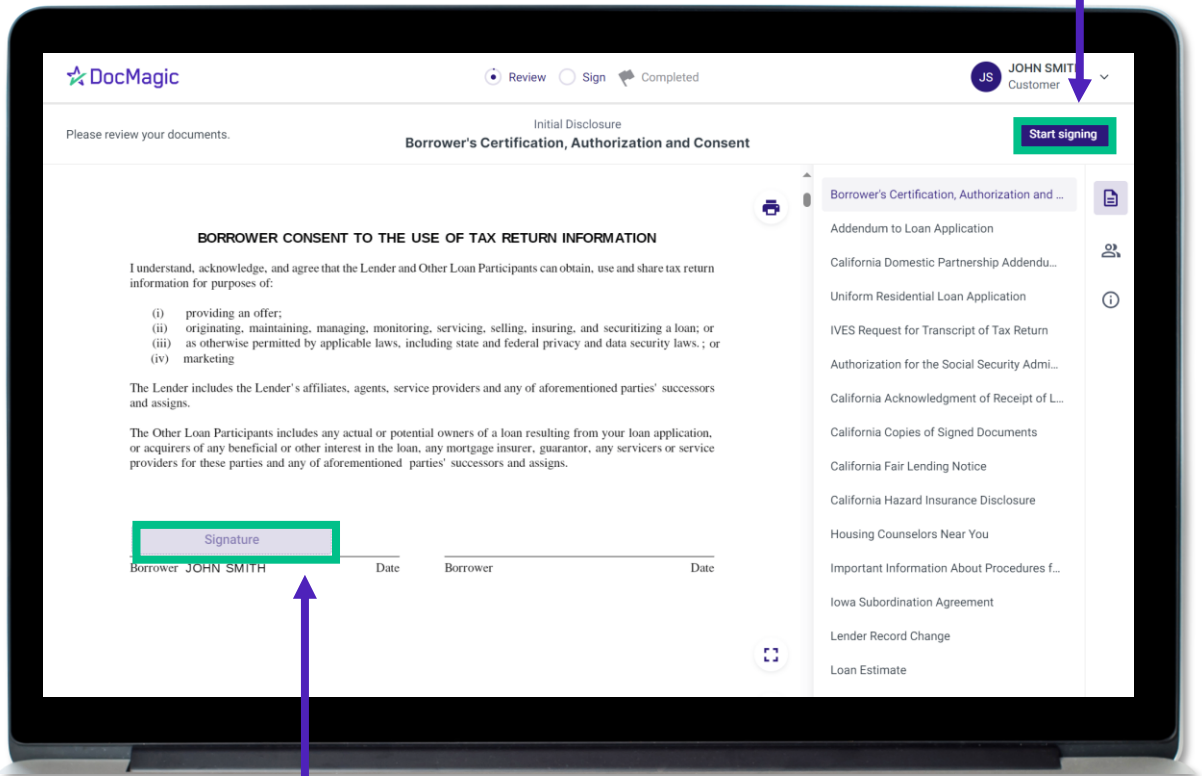
Return to Documents List

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



Start Signing

Click "Start Signing" to begin the signing process.



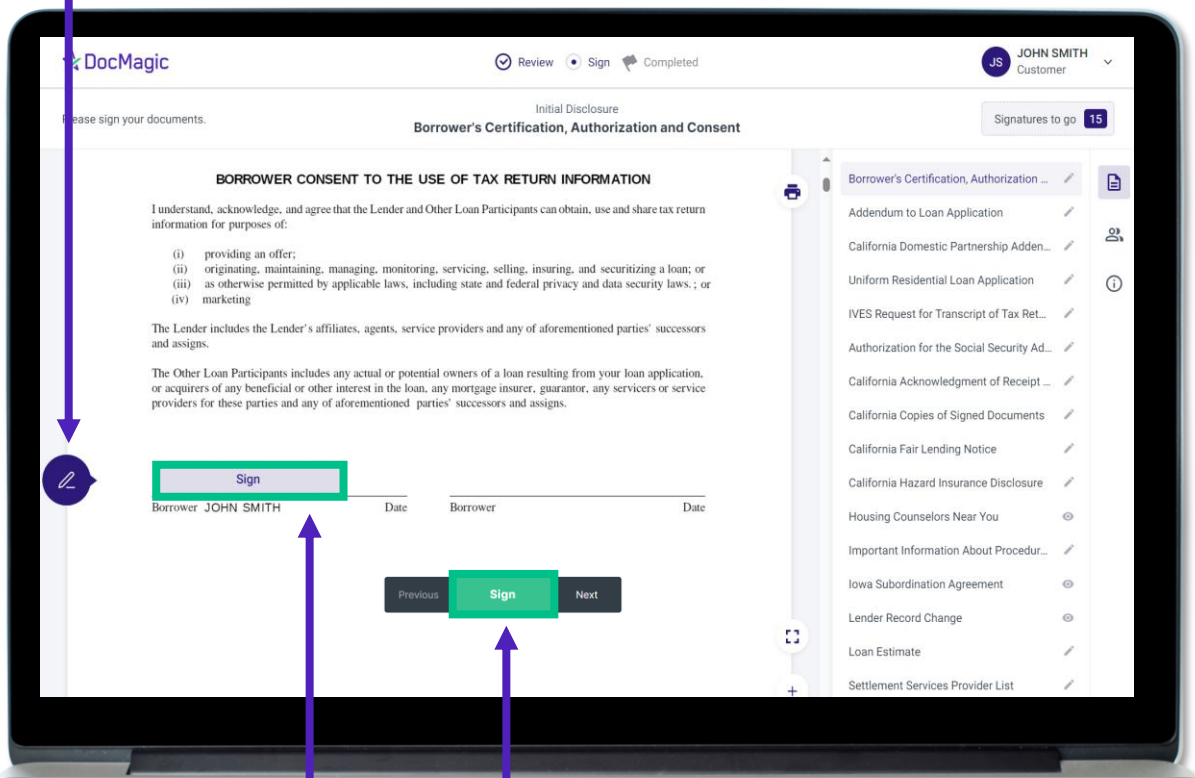
You can't sign anything until you hit the purple button in the top right corner – until then, these will remain greyed out and unclickable.



Begin Click-Signing

There are three options for click-signing.

1. Clicking the pen icon.



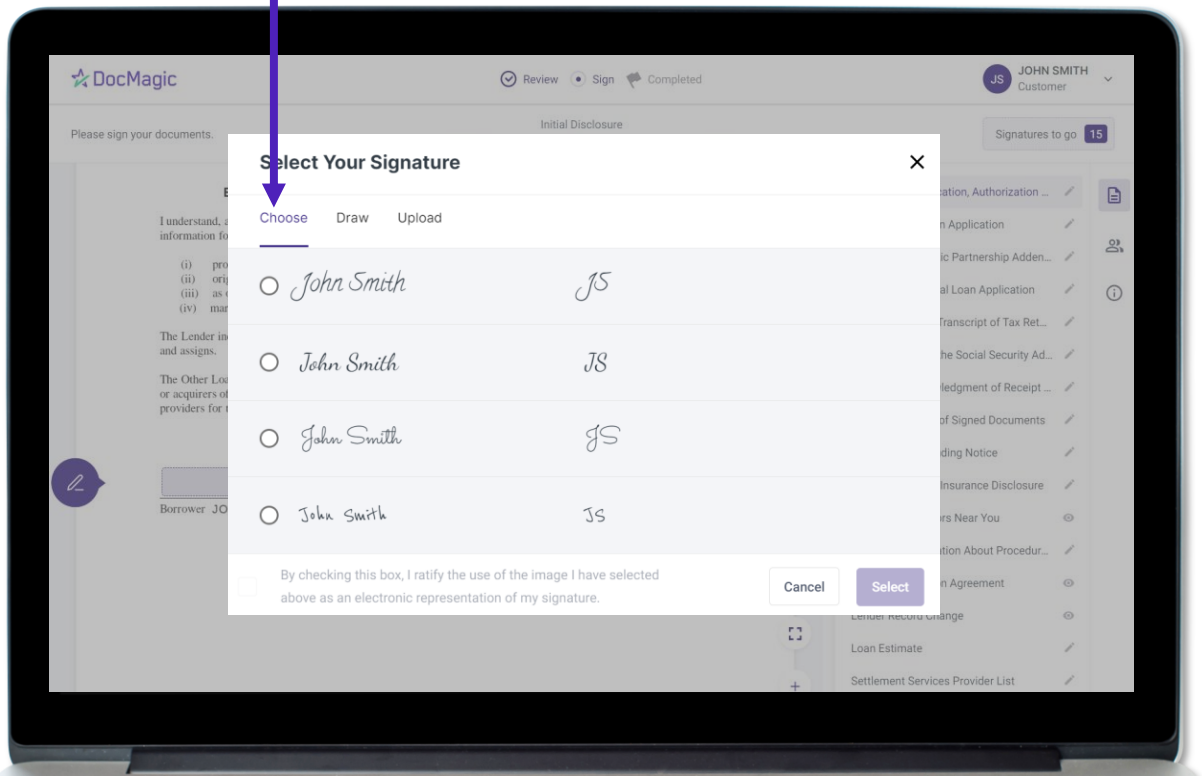
2. Clicking on the "Sign" box directly.

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



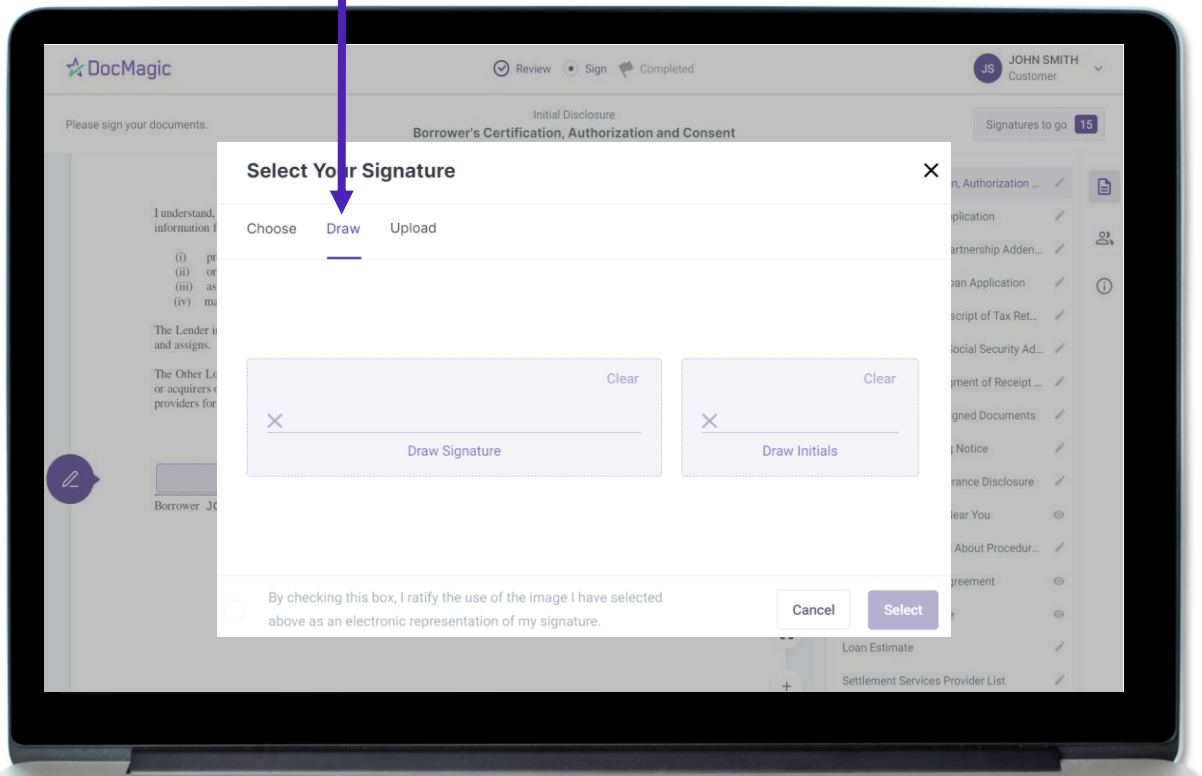
Signature Options

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



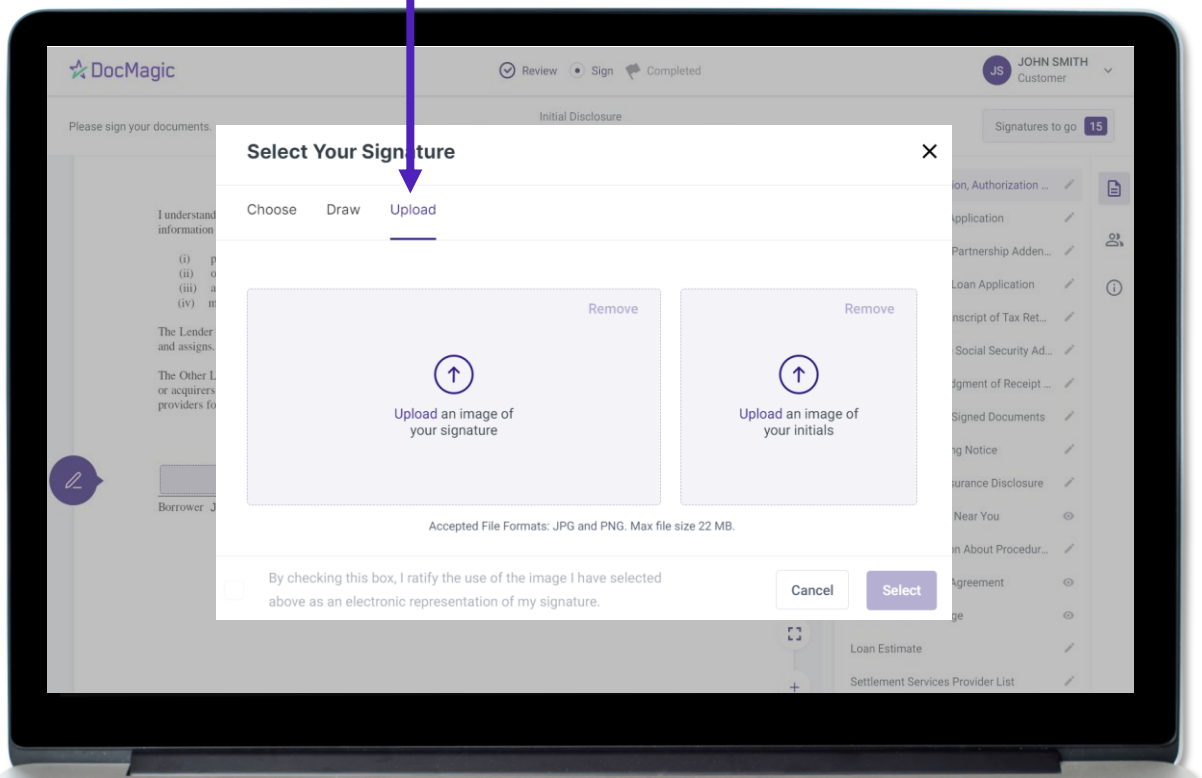
Signature Options

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

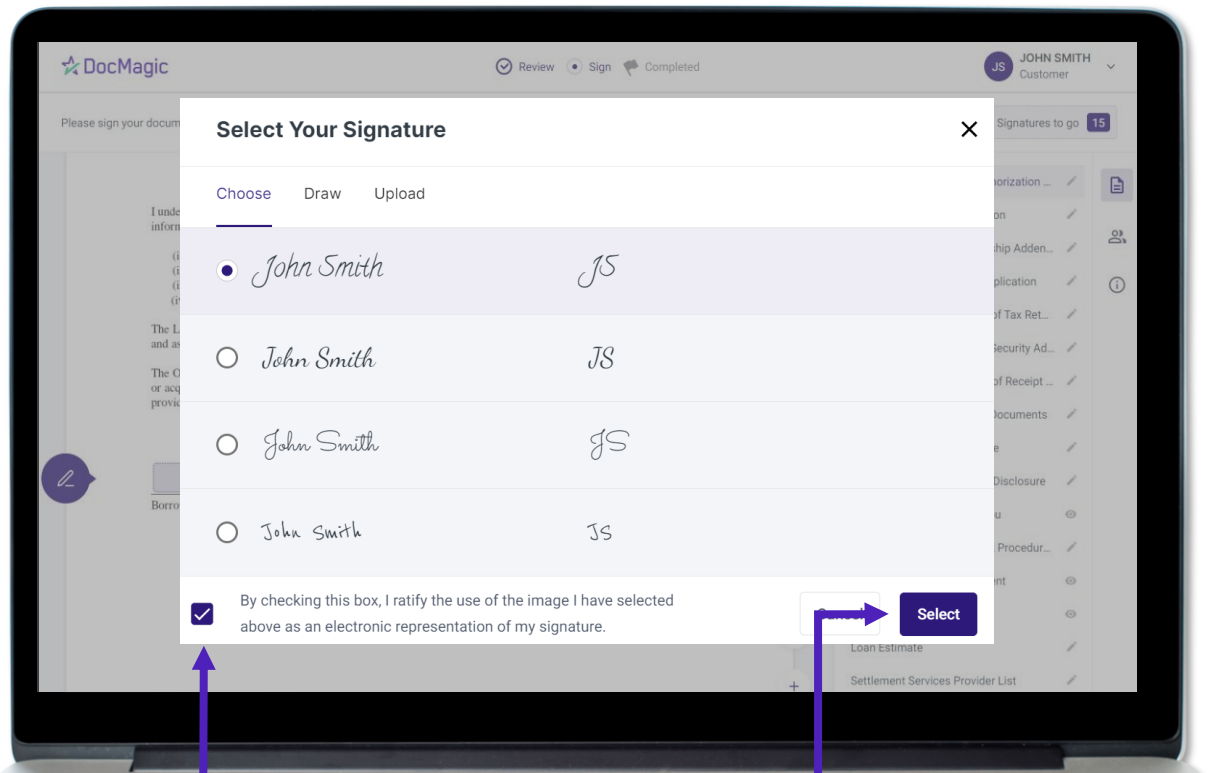


Signature Options

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:
L. Lender name: **CSI TEST LENDER (SALES)**
M. Street address (including apt., room, or suite no.): **800 W. 213TH STREET**
N. City: **TORRANCE** V. State: **CA** W. ZIP code: **90501**
O. Lender phone number: **(800) 649-1362**

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

a. Return Transcript b. Account Transcript c. Record of Account
Wage and income transcript (W-2, 1099-E, 1099-G, etc.)

Enter a max of three form numbers here; if no entry is made, all forms will be sent.
Mark the checkbox for taxpayer(s) requesting the wage and income transcripts. If no box is checked, transcripts will be provided for all listed taxpayers.
Line 1a Line 2a

Year or period requested. Enter the ending date of the tax year or period using the mm dd yyyy format (see instructions)
12 / 31 / 2022 **12 / 31 / 2021** / /

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

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

Sign Here
Signature for Line 1a (see instructions) Sign Date Phone number of taxpayer on line 1a or 2a: **(310) 555-5555**

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) Date

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

Print/Type name

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

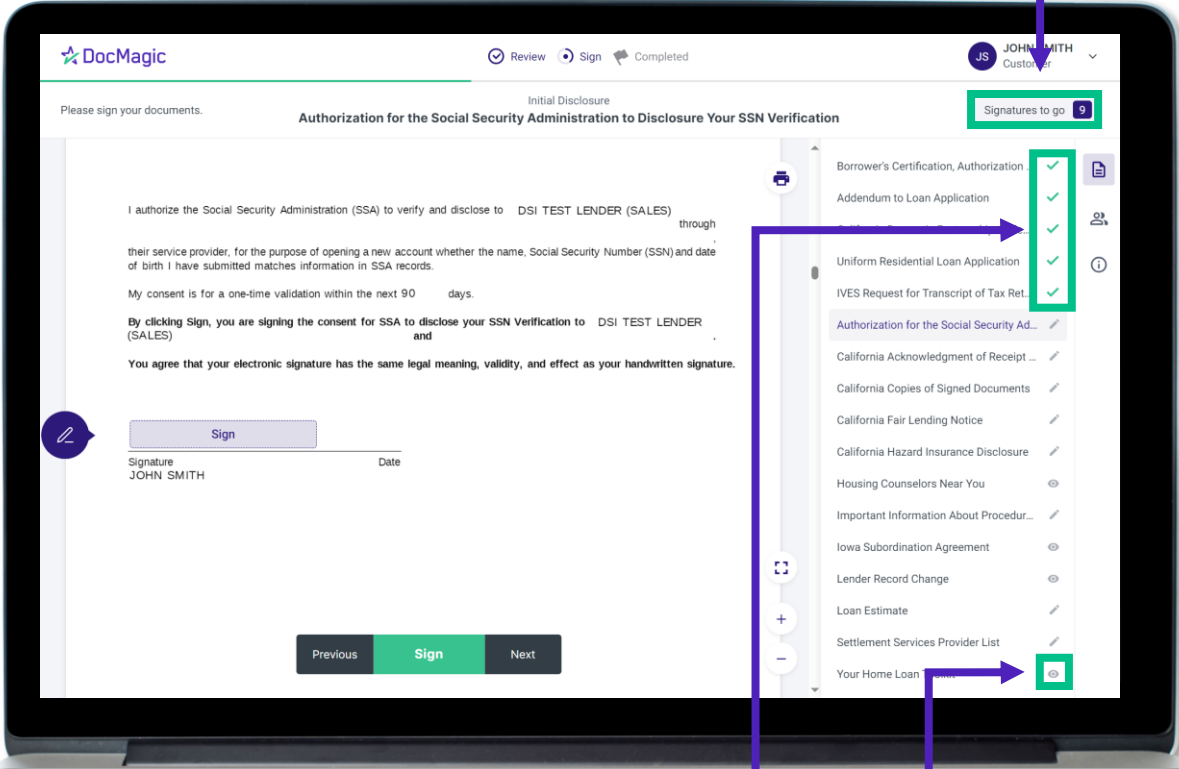
Previous **Check** Next

Borrower's Certification, Authorization ... ✓
Addendum to Loan Application ✓
California Domestic Partnership Adde... ✓
Uniform Residential Loan Application ✓
IVES Request for Transcript of Tax Ret... ✓
Authorization for the Social Security Ad... ✓
California Acknowledgment of Receipt ... ✓
California Copies of Signed Documents ✓
California Fair Lending Notice ✓
California Hazard Insurance Disclosure ✓
Housing Counselors Near You ○
Important Information About Procedur... ✓
Iowa Subordination Agreement ○
Lender Record Change ○
Loan Estimate ✓
Settlement Services Provider List ✓
Your Home Loan Toolkit ○



Keeping Track of Your Progress

The countdown feature shows how many signatures remain.



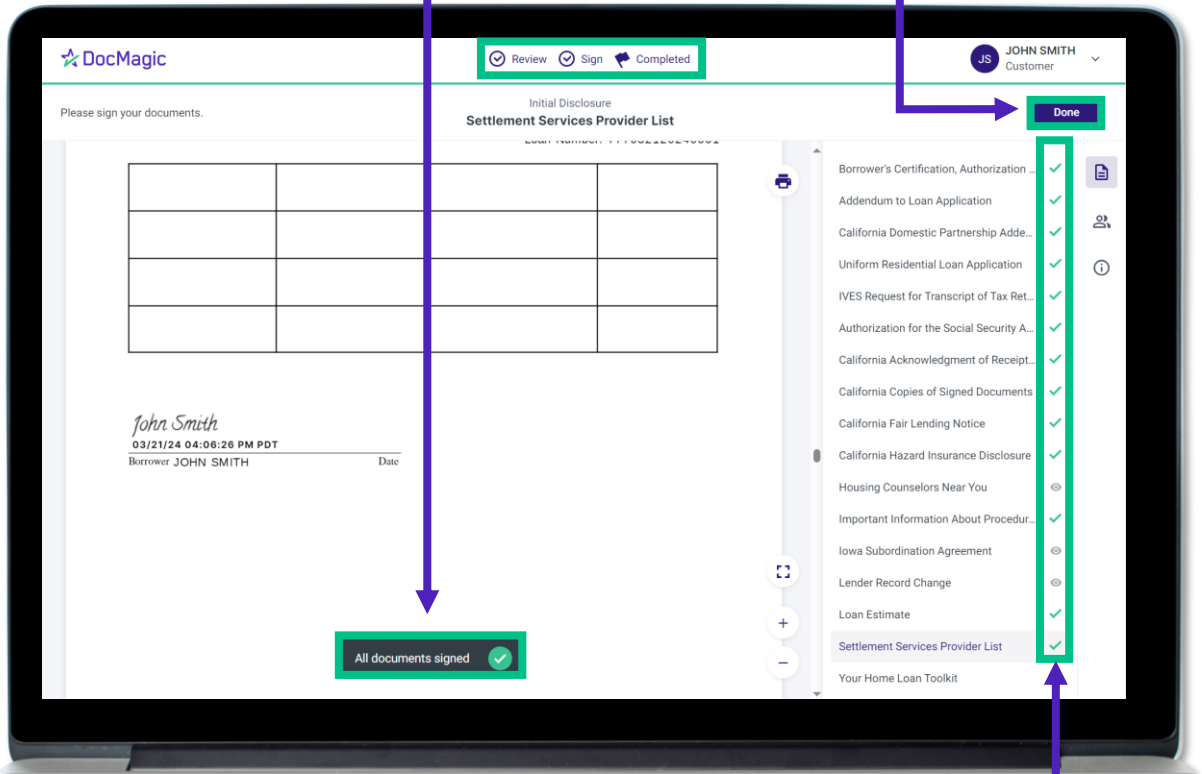
A green check mark next to a document name indicates that it has been signed and completed.

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



When Complete

These icons will indicate when the process is complete.

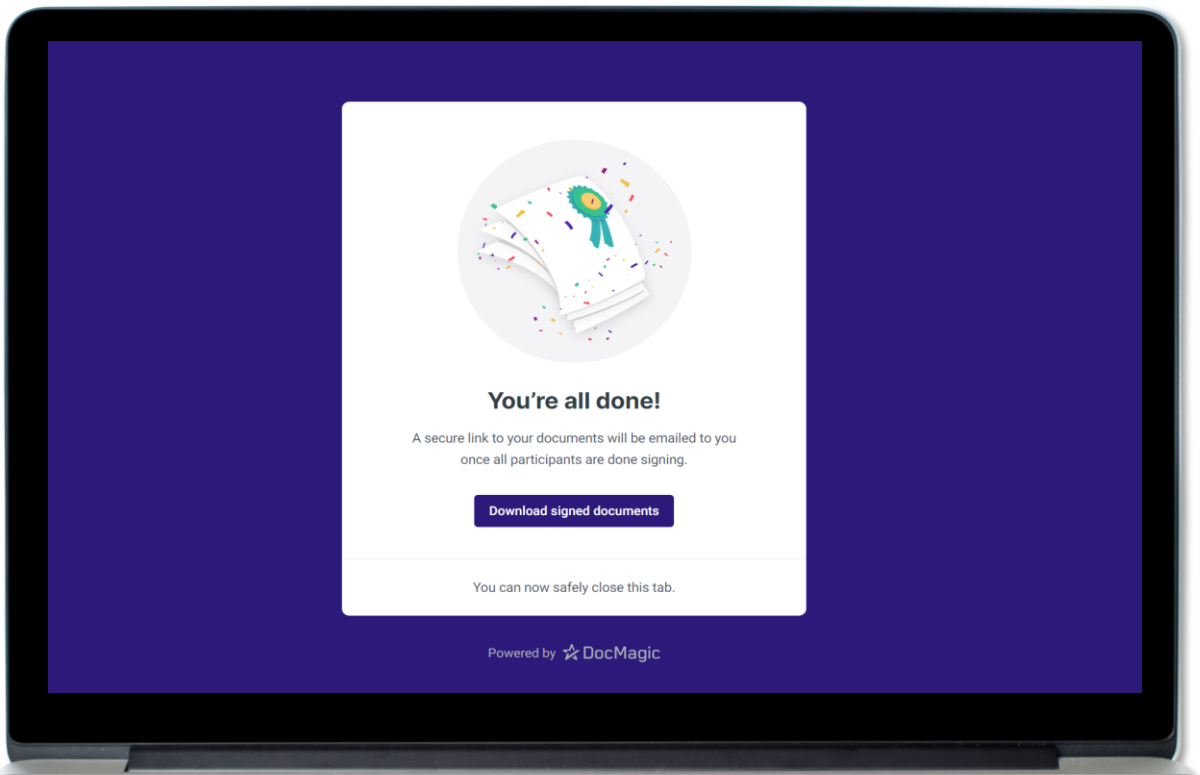


All applicable checkmarks will be green.



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 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 #: 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

The interface also features a 'Details' tab and a 'Documents' tab. A toolbar at the top right contains icons for document management, including a PDF icon and a printer icon, which are highlighted by a green box. A blue arrow points from the text box above to this toolbar, and another blue arrow points from the text box below to the same toolbar.

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

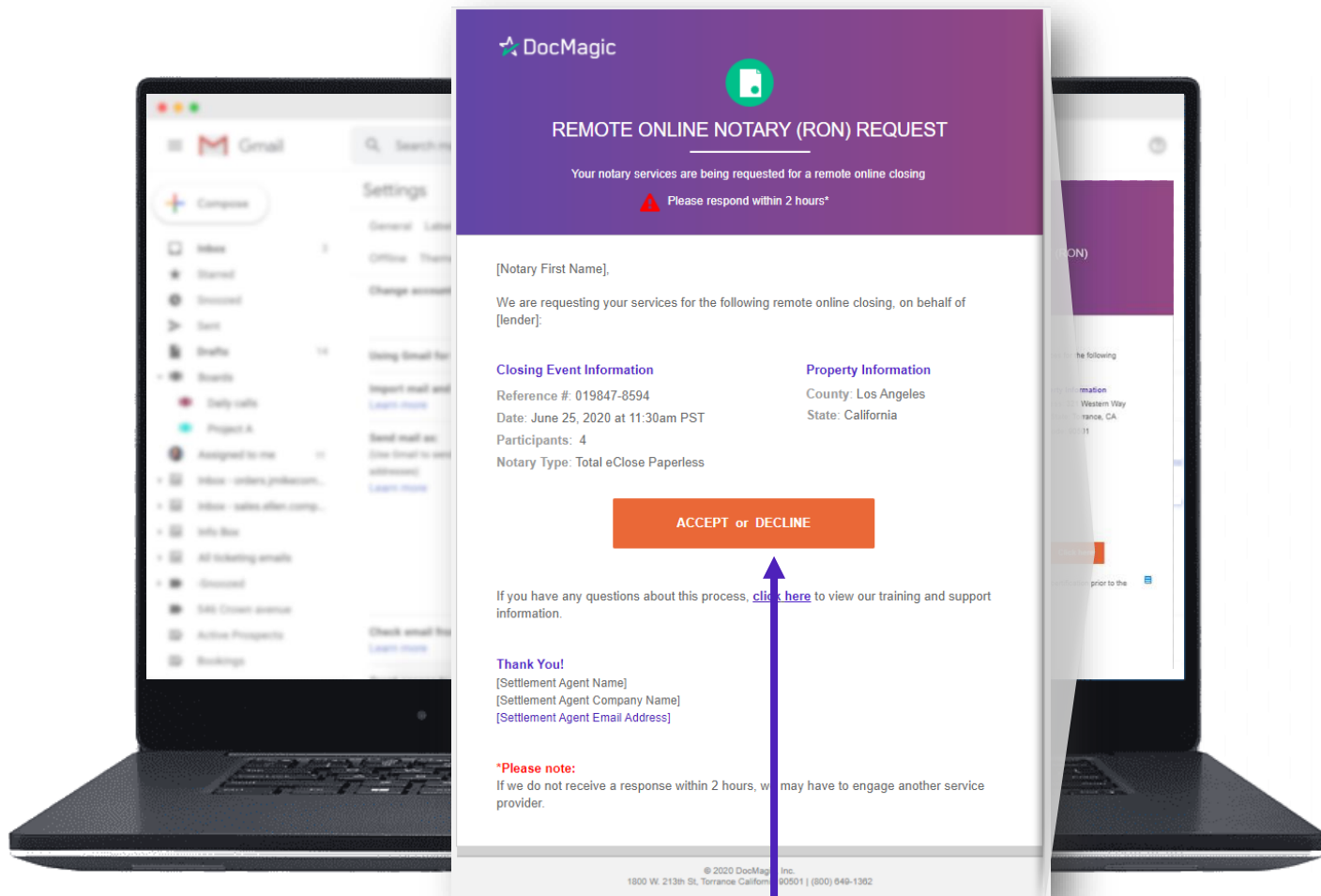




Total eClose (Notary Experience)

Remote Online Notary Request

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

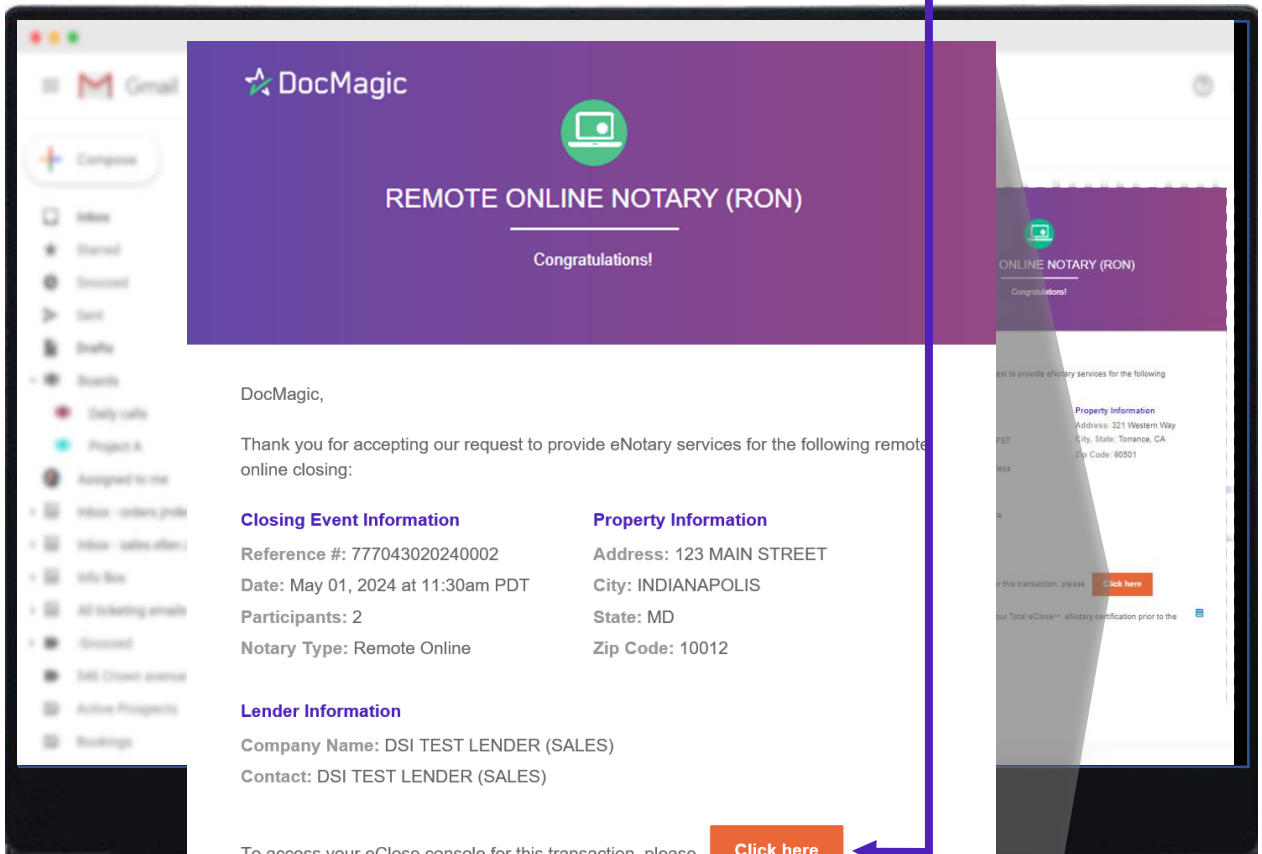


The email includes a link to accept or decline the request.



Access to the eClose Console

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



To access your eClose console for this transaction, please

[Click here](#)

***Please note:** You must obtain your Total eClose™ eNotary certification prior to the closing on 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



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: struitt@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 struitt@docmagic.com	Borrower	Doc Magic ron-test@docmagic.com	DocMagic RON 11/9/2021 - 12:00am			● Not Started	Open Signing Room
2	Oliver Originator oliver.originator@mailinat...	Originator					● Ready to Sign	Open Signing Room
3	Sally Settlement struitt@docmagic.com	Settlement Agent					● Ready to Sign	Open Signing Room

Documents (6) [+](#) [-](#) [📄](#) [☁](#) [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		

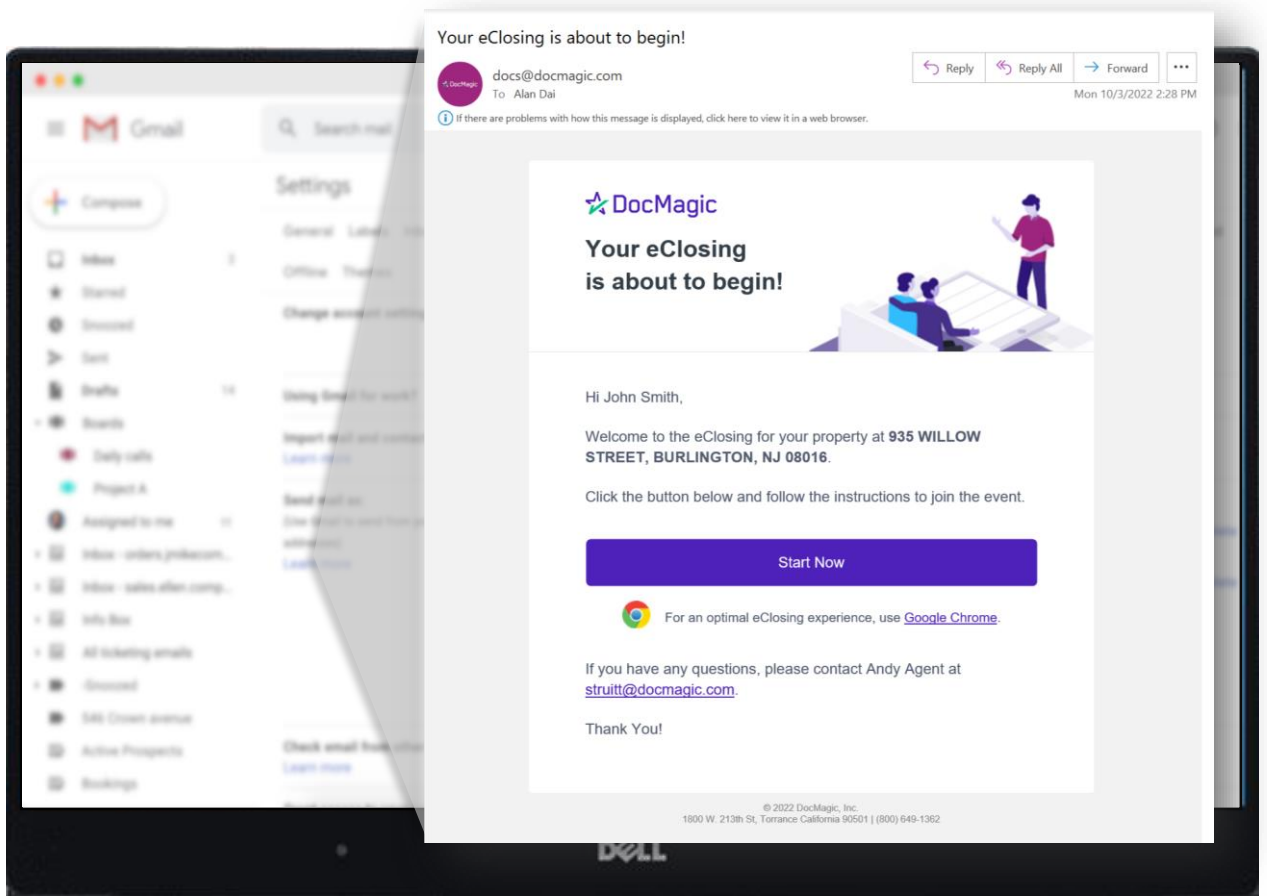
Include link for knowledge-based authentication (KBA)

They will click Start eClosing when ready.

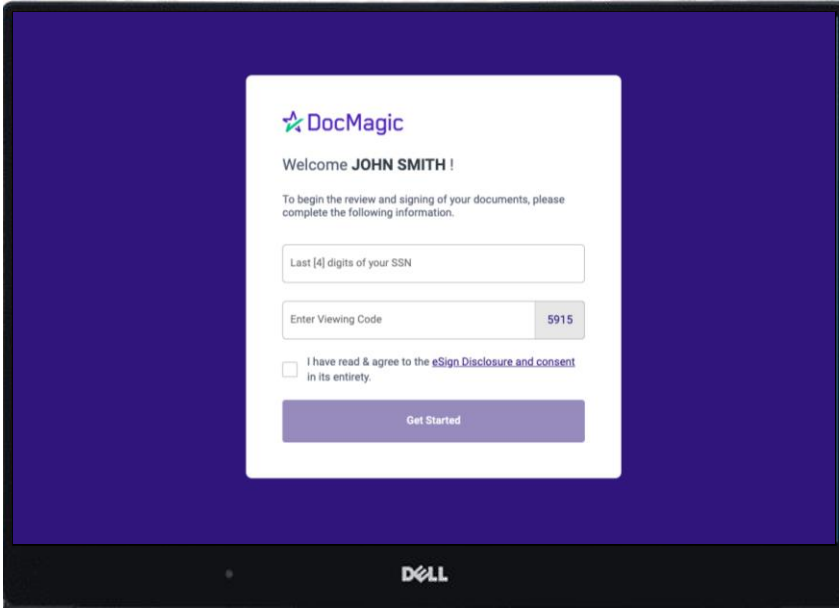


Invitation Email

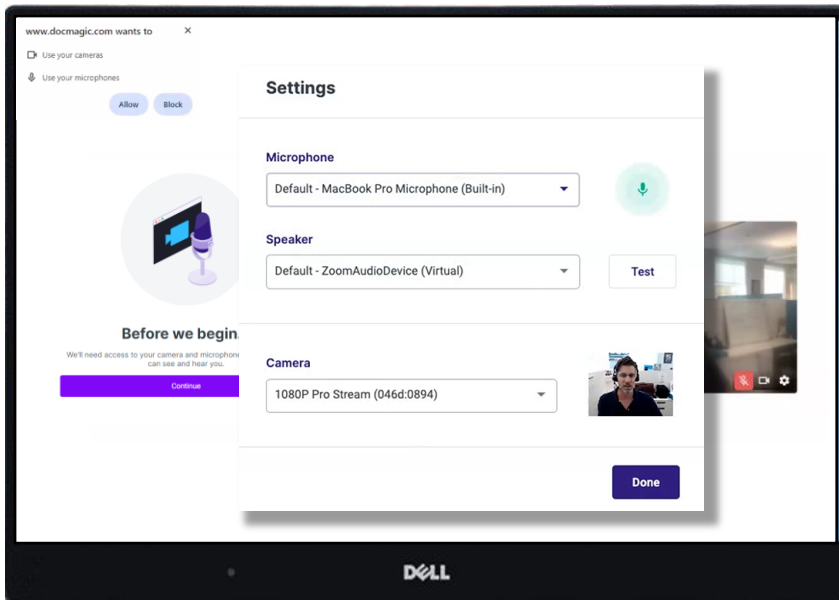
Participants will receive an invitation email containing all pertinent closing information and a **Start Now** button to enter the eClosing event.



Accessing The Signing Room (Borrower)



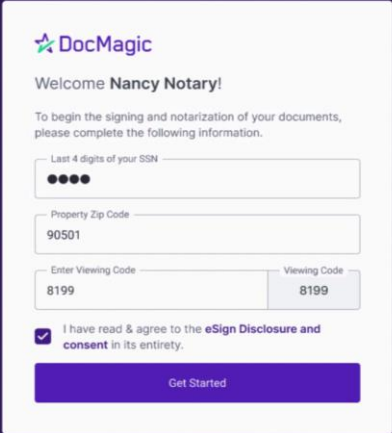
The Borrower logs in with a passcode and a viewing code.



The borrower will also check their mic and camera settings.



Accessing The Signing Room (Notary)



DocMagic

Welcome **Nancy Notary!**

To begin the signing and notarization of your documents, please complete the following information.

Last 4 digits of your SSN
●●●●

Property Zip Code
90501

Enter Viewing Code
8199

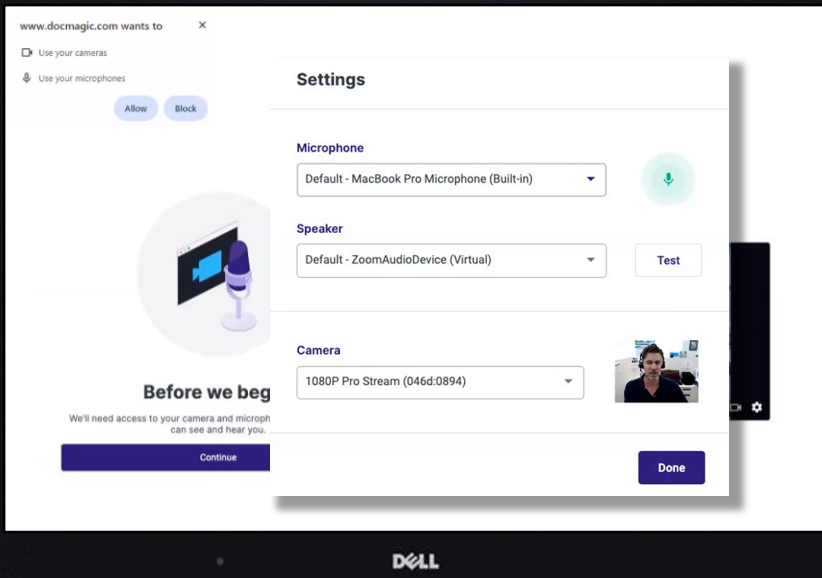
Viewing Code
8199

I have read & agree to the **eSign Disclosure and consent** in its entirety.

Get Started

DELL

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) Test

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

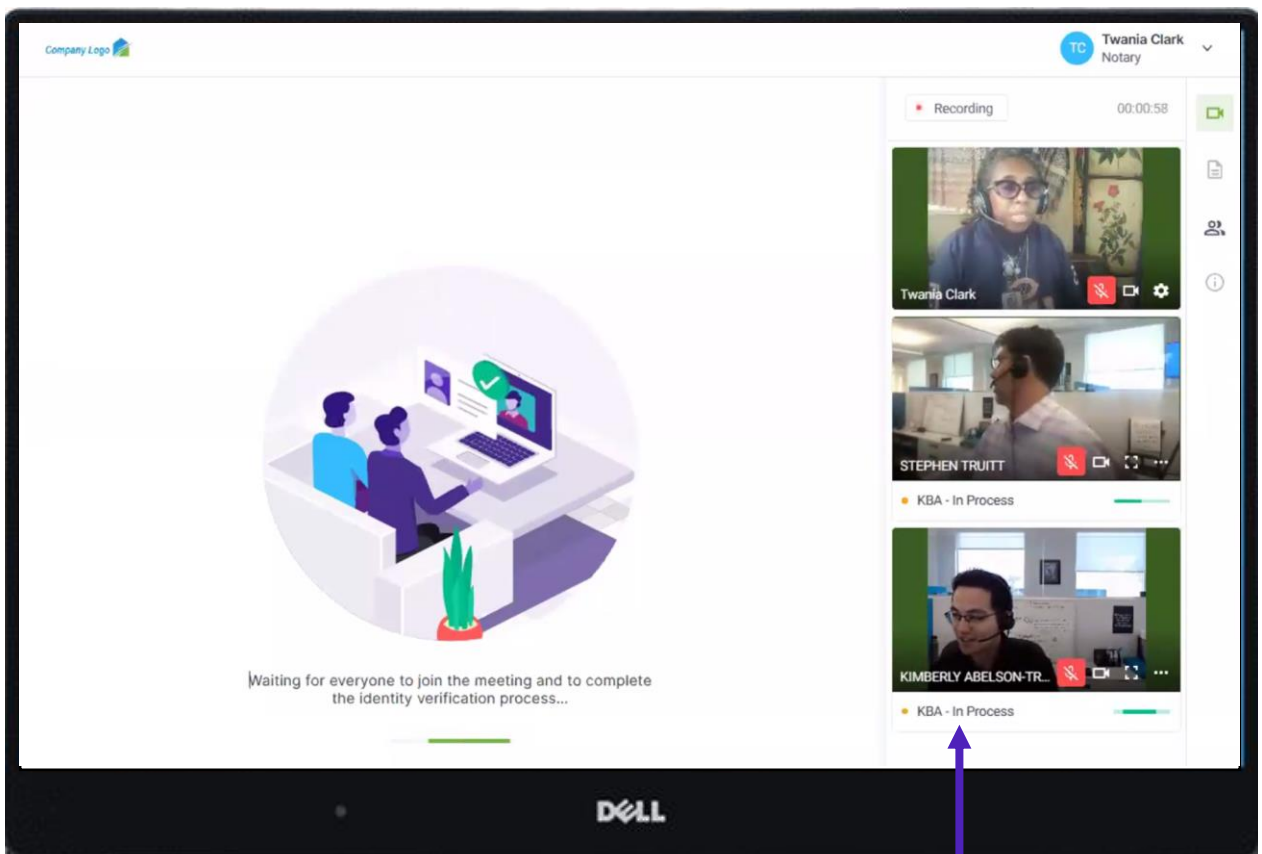
DELL

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.

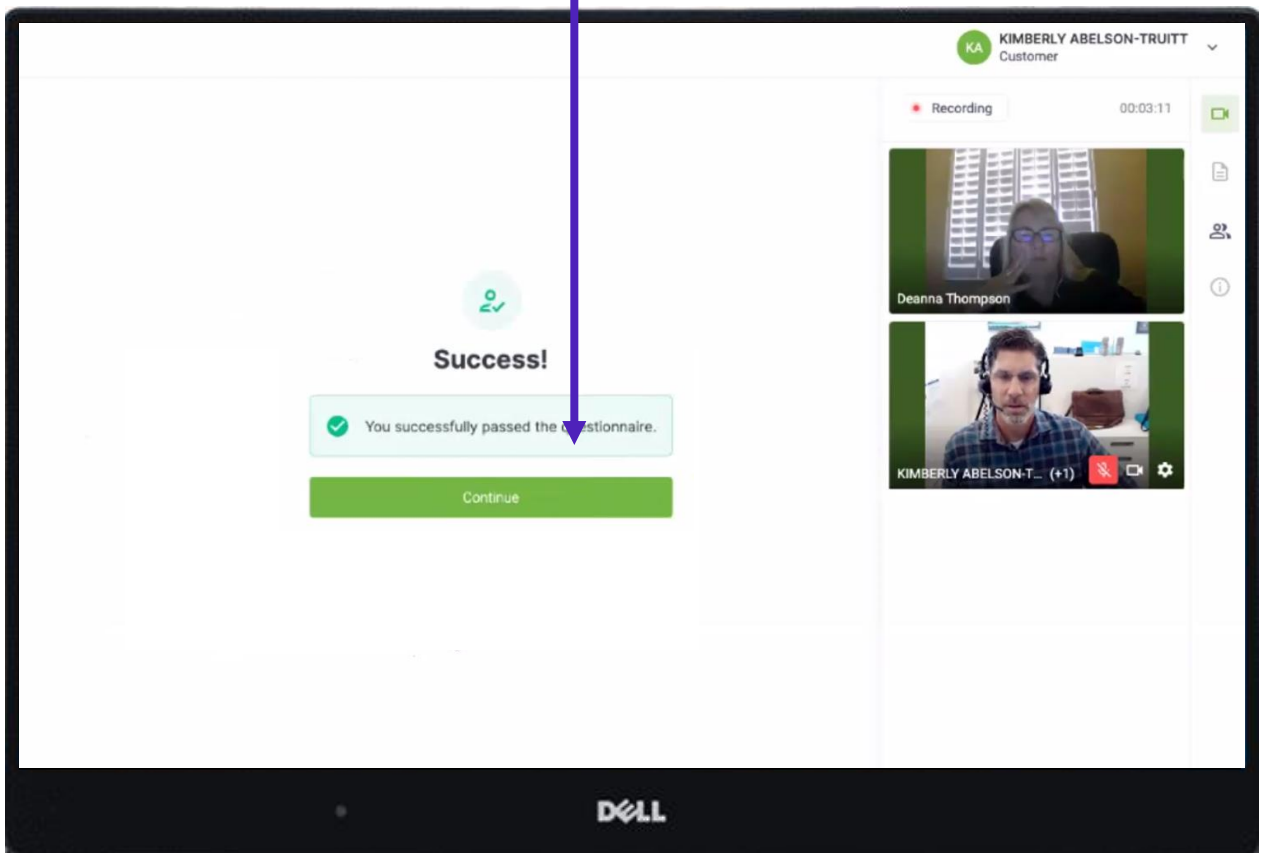


The borrowers will have two minutes to answer five questions about themselves. The Notary does not see the KBA – only this “KBA – In Process” status.



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 details, a COUNTDOWN TO CLOSING timer, and a table of signers.

Signer(s)	Completed	Delete
1	✓	
1	✓	
3	✓	
4	✓	
5	✓	
6	✓	

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



I.D. Validation via Smart Device

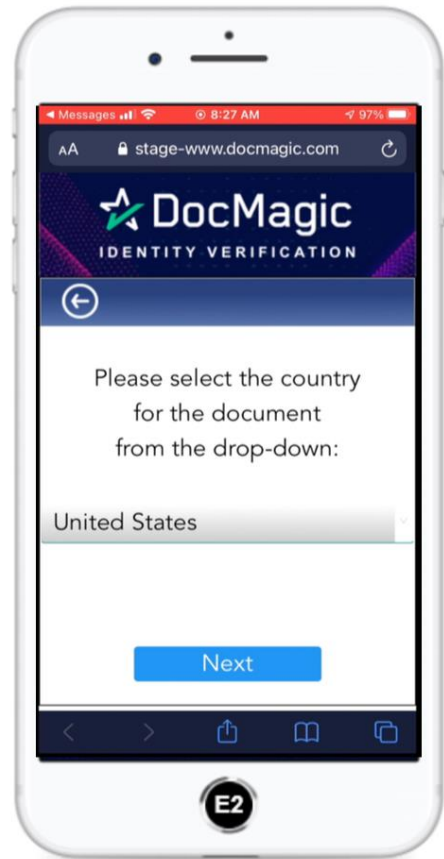
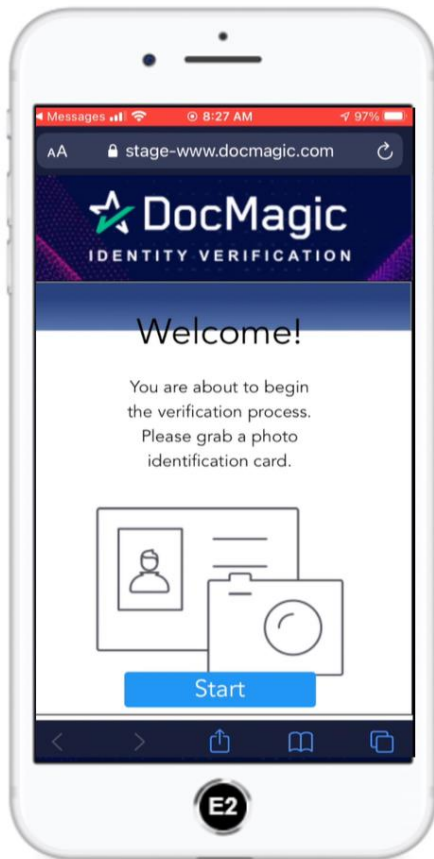


The Participant will receive a text message containing a link to complete the I.D. Verification process.



I.D. Validation via Smart Device

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

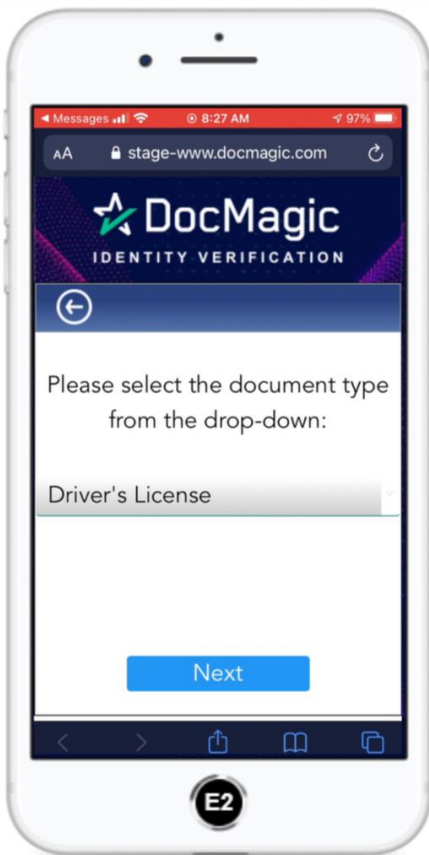


Next, the borrower will select the country that issued their identification.



I.D. Validation via Smart Device

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

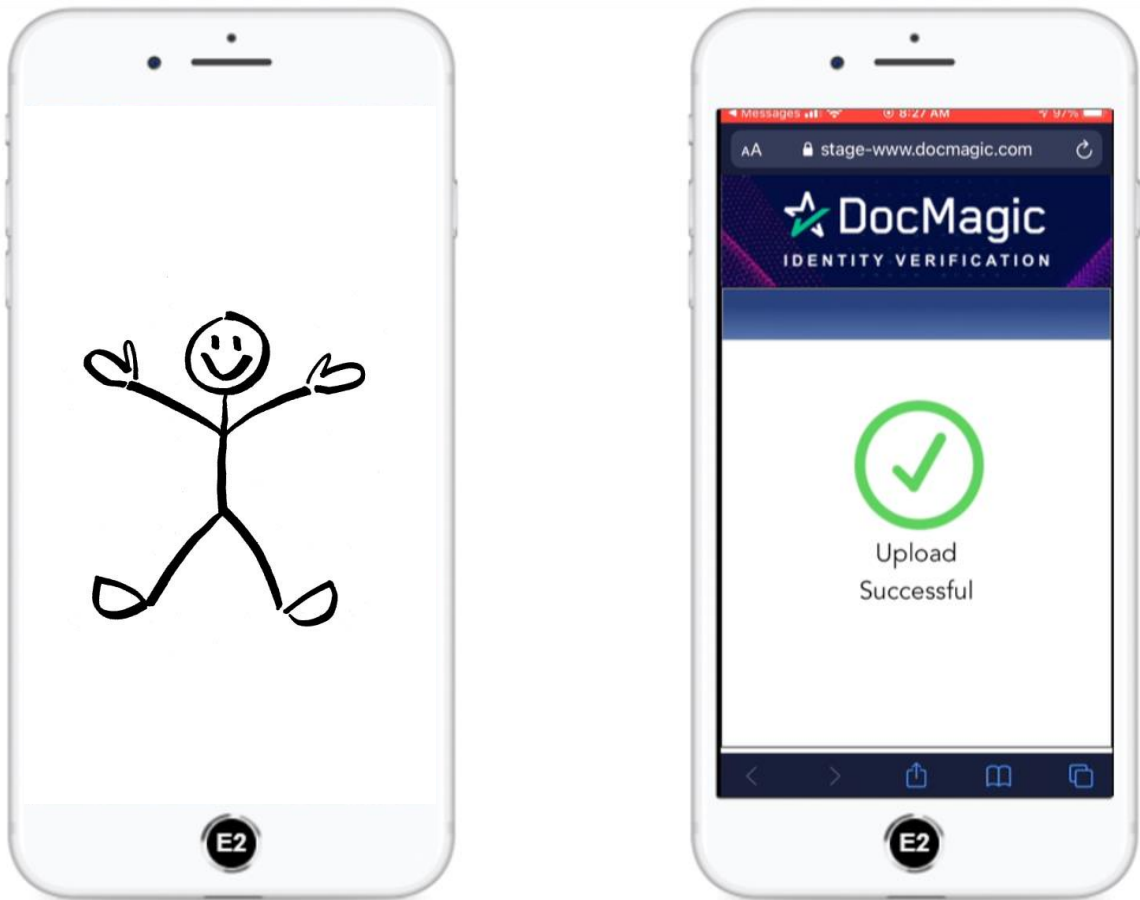


Next, they will select a file from their phone or take a photo and upload it. *The borrower will repeat the process and upload both sides of the I.D.*



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.

Identity (ID) Verification Results

Signer has Failed the Identity Verification Test

Confidence Score: **0%** [View Report](#)

Additional Verification *Required

*ID Type: Select

*ID Number: Enter ID Number

*Expiration: MM/DD/YYYY

Attachments: No attachments added

* I have checked the signer's identification and verified that all of the information is correct.

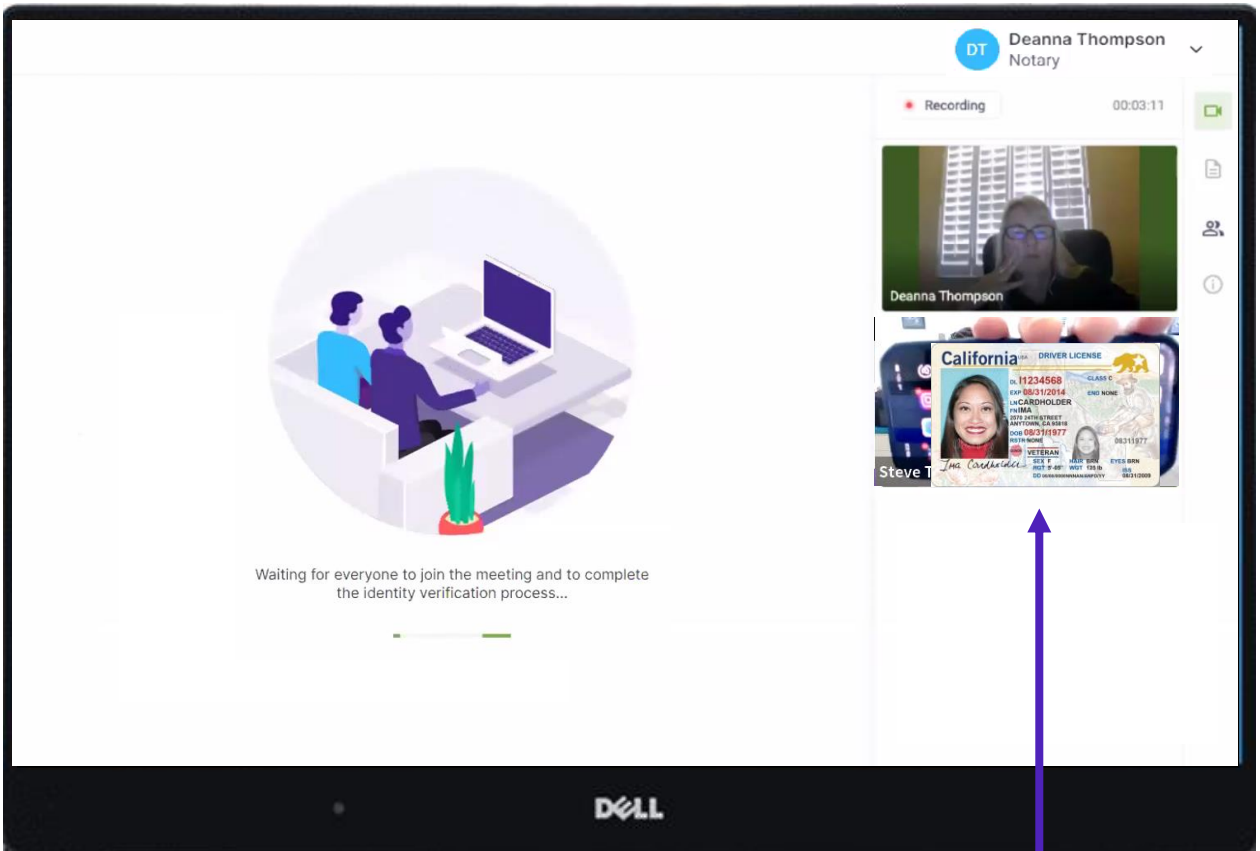
[Close](#) [Save](#)

Signer(s)	Completed	Delete
1	✓	
1	✓	
2	✓	
2	✓	
2	✓	
3	✓	
2	✓	

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 interface. At the top, a progress bar shows 'Review' as the active step, followed by 'Sign' and 'Notarize', with 'Completed' at the end. Below this, the document title 'Initial Disclosure Authorization and Consent' is visible. A 'Start signing' button is located in the top right corner. An email preview is overlaid on the screen, showing a message from 'DSI TEST LENDER (SALES)' to 'Alan Dai' with a 'Completed' status. The email content includes a link to review documents and a note about a second email received the morning of closing. 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. A blue arrow points from the text box above to the edit icon (a pencil inside a square) for the first document, 'Closing Disclosure'.

#	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.

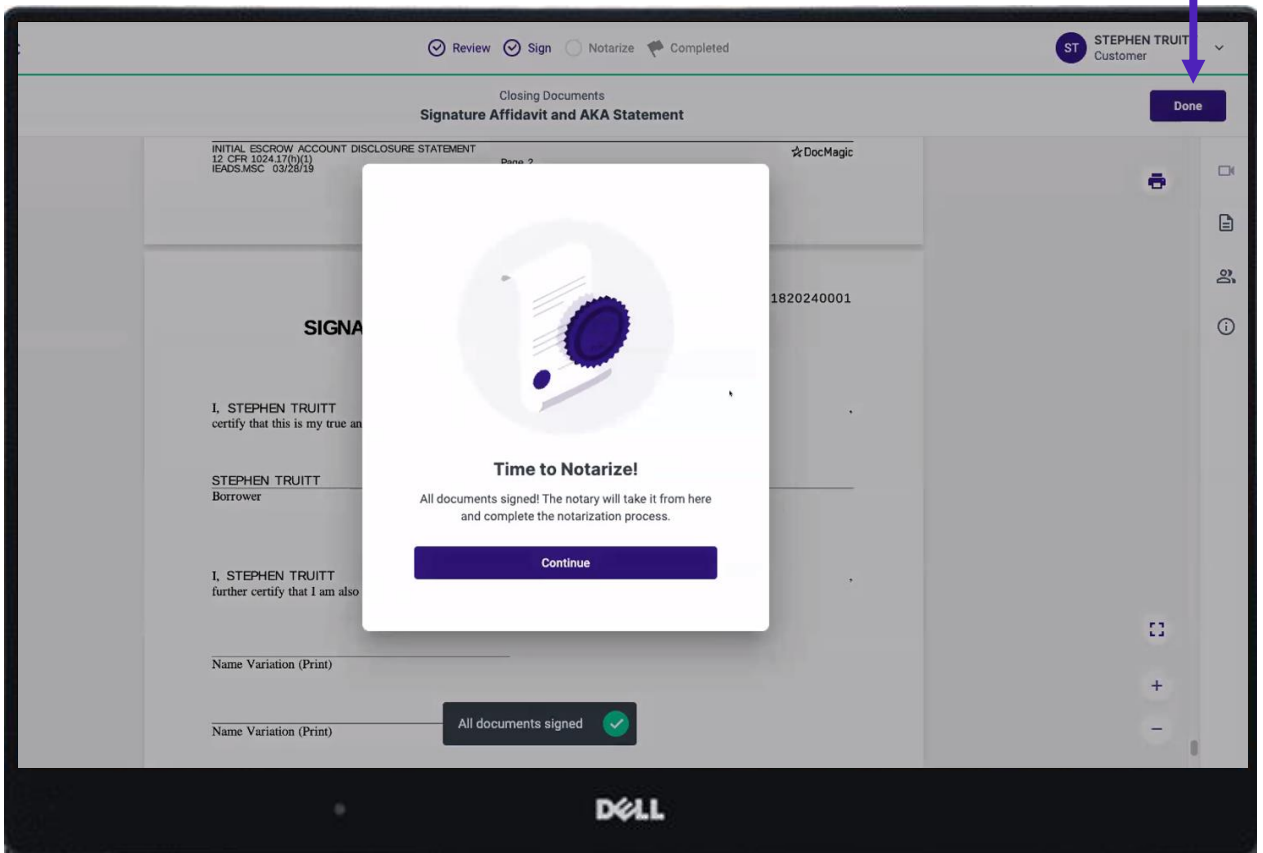
On the right side of the screen, there is a video feed of "JOHN SMITH" with a menu of options: Restart Meeting, Change Email Address, Withdraw Consent, Terms of Use, and Save & Exit. A "Refresh Documents" button is highlighted in a green box at the bottom right of the video feed.

Click Refresh Documents.
The changes should show.



Applying Signer eSignatures

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

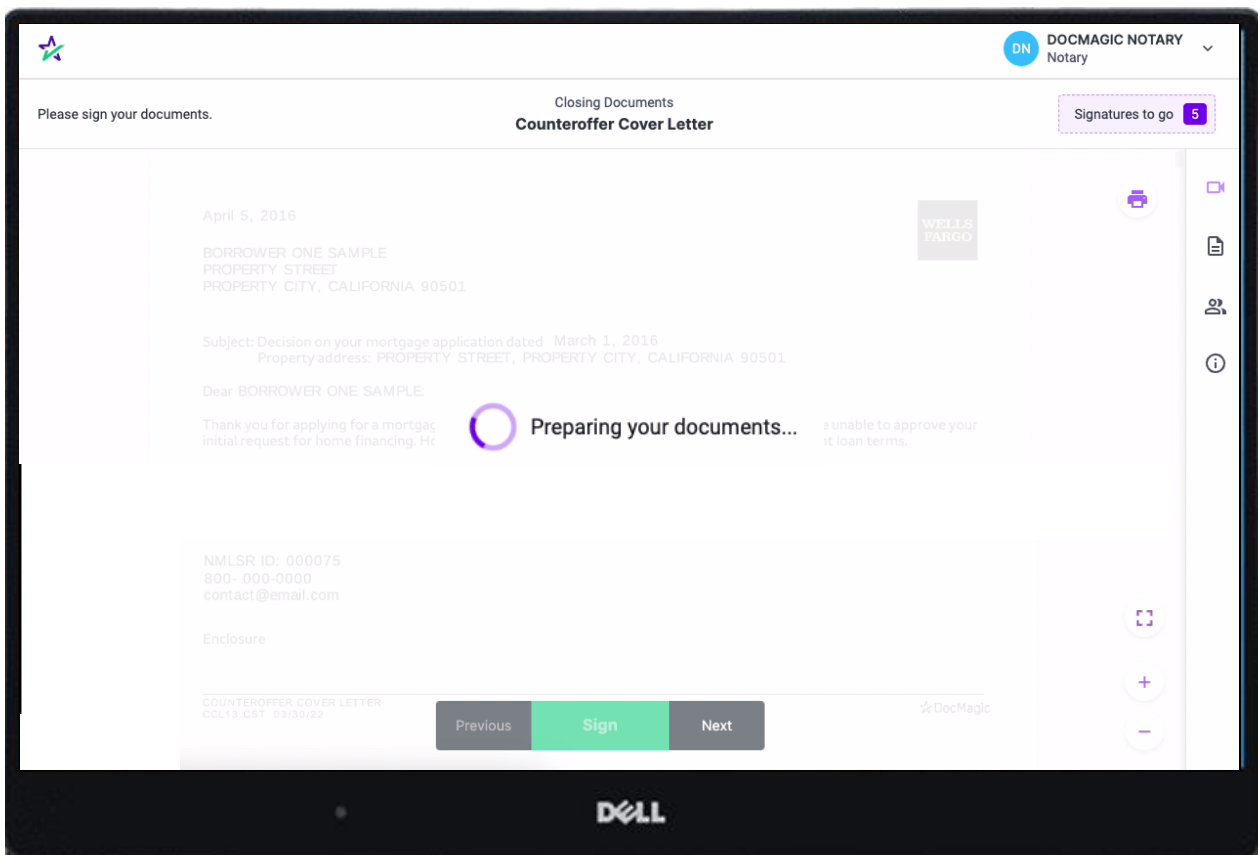


This will transfer control and signing ability back to the Notary who will then start the notarization process.



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

DT Deanna Thompson
Notary

State of _____

County of

Signed and sworn to (or affirmed) before me on the day of

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

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

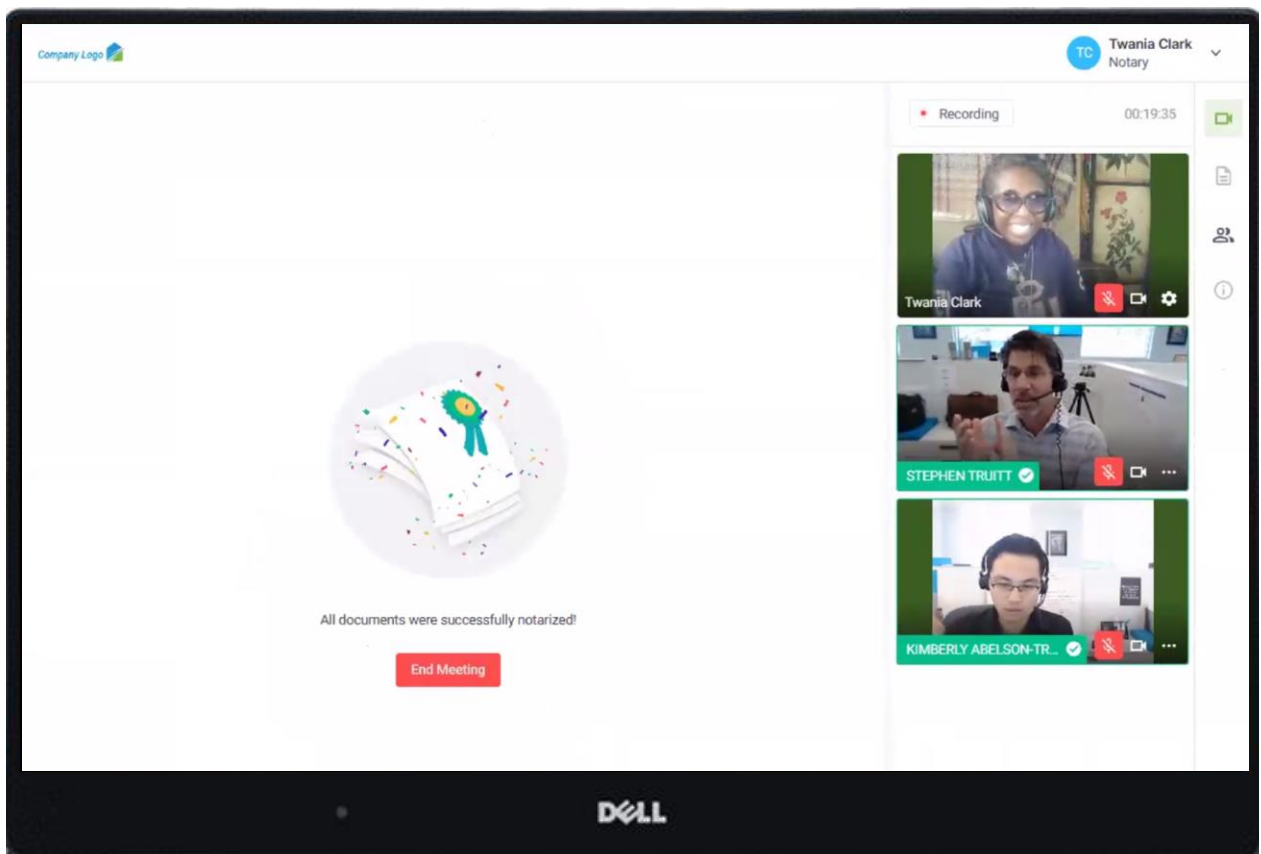
DELL

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



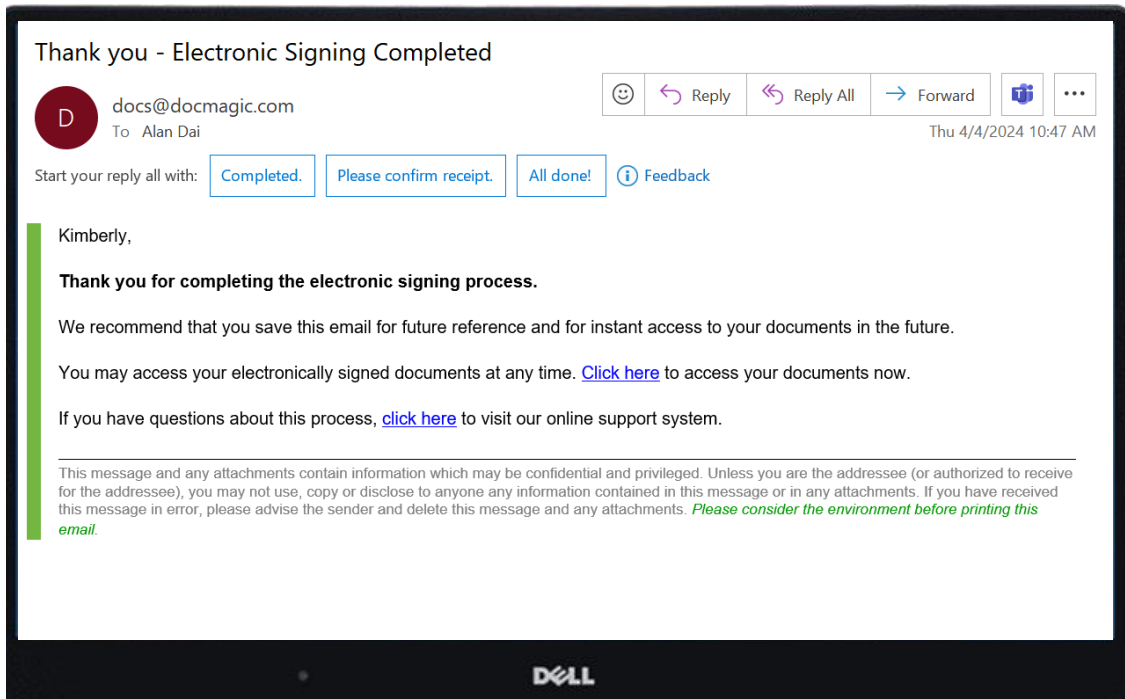
Ending the Meeting

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 several informational boxes: Package ID: 437477, Worksheet #: 2192 (Version: 1), and two contact cards for Leah at DocMagic. The main navigation bar includes "Details", "eJournal", and "Action Log". The "Journal" section is active, showing a table with one entry for John Smith, notarized on December 15, 2021, at 1:40pm CST. Below the table is a detailed view of the signing session, including Signer's Details (John Smith, 222333 PEACHTREE PLACE, ATLANTA, GA 30318), Contact Information, Signature (John Smith), Identification Details (Driver's License: 123456 • Exp. 4/14/2022), Document Notarized (MERS New Jersey Mortgage, Signature Affidavit and AKA Statement), Notarial Service (Acknowledgement, Affidavit), and Fees (\$0.00). A "Recordings" section is highlighted with a green border, containing a table with one entry: File: 437477_2021-12-15T19:35:38.012Z.mp4, Date Recorded: December 15, 2021 • 1:35pm CST. A blue arrow points from the "Download" link in the Recordings table to the 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 for Loan # 1638481916201, Primary Borrower John Smith, Type EClosing, Package ID 417659, and Worksheet # 1638481916201. The LENDER section shows Company SAMPLE SONS L..., Contact Michael Morford, Email mikem@docmagic..., and Phone (555) 555-5555. The SETTLEMENT AGENT section shows Company Settlement Closing..., Contact Sally Settlement, Email strull@docmagic.c..., and Phone (987) 555-4321. The COUNTDOWN TO CLOSING section shows a timer for Days, Hours, Minutes, and Seconds, with a date of Apr 19, 2023 (Wed) and time of 12:00am PDT. Below these sections are tabs for Details, eJournal, and Action Log. The Action Log tab is selected and highlighted with a green box. The Action Log table has columns for Date & Time (PST), User Name, IP Address, and Description. The table contains six rows of activity logs. At the bottom of the Action Log section, there is a text input field with a green border and a button labeled 'Add Internal Note To Action Log'.

Date & Time (PST)	User Name	IP Address	Description
3/24/21 5:06 PM	System User		eSign event created
3/24/21 5:06 PM	Erica Sample		Invitation sent to erica.sample@example.com
3/24/21 5:06 PM	Sally Settlement		Invitation sent to sally.settlement@example.com
3/24/21 5:11 PM	System User		Date: 2021-03-24 17:11:04 InkSign Fax received for document: 3596363 ()
3/24/21 5:11 PM	Erica Sample		Multistate Fixed Rate Note signed by Erica Sample
3/24/21 5:12 PM	Sally Settlement	172.16.1.98	Document AZACPRS.TTL.pdf added to package

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 are tabs for Details, eJournal, and Action Log. The main area shows a list of Signers (2) with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. The first signer is Erica Sample (Borrower) with a status of 'Finished'. The second signer is Sally Settlement (Settlement Agent) with a status of 'Ready to Sign'. A red box highlights the 'Open Signing Room' button for the Settlement Agent. Below the signers is a 'Documents (16)' section with a table listing documents and their completion status.

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	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

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



eClose Console Confirmation

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

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



Email Confirmation

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



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



eJournal

Click on this tab to access the eJournal.

The screenshot displays the DocMagic eClose Console interface 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 John Smith, Notarization Date and Time November 9, 2021 • 10:32am PST. A green box highlights a down arrow icon at the end of this row. Below the "Journal" section, there 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. A green box highlights a down arrow icon at the end of this row. A purple arrow points from the "eJournal" tab to the "Journal" section, and another purple arrow points from the down arrow icon in the "Journal" section to the second text box.

#	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	*Notarial Service	Fee
MERS New Jersey Mortgage Dec 15, 2021 • 1:39pm CST	Acknowledgement	\$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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Cancel Save

Recordings

#	File	Date Recorded
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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.

