



Settlement Agent eClose Console with AutoPrep™

GUIDEBOOK

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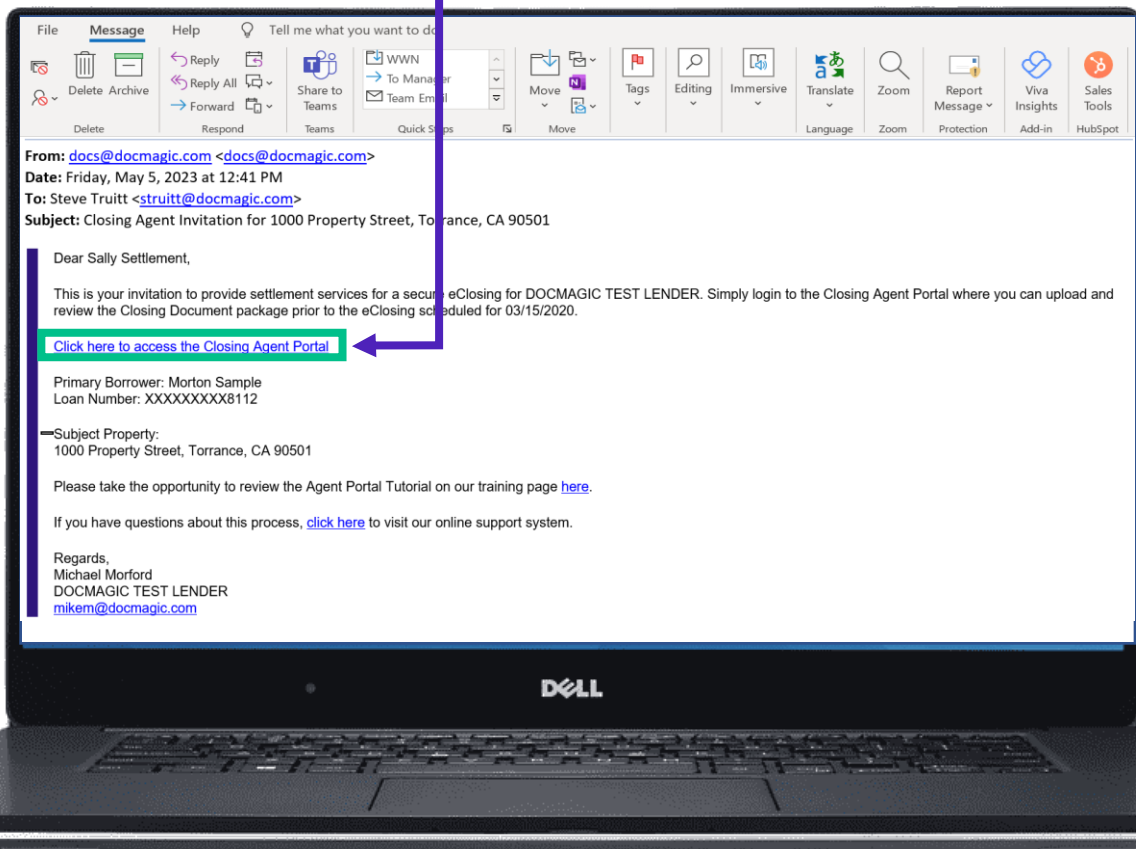
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# Settlement Agent Invitation Email

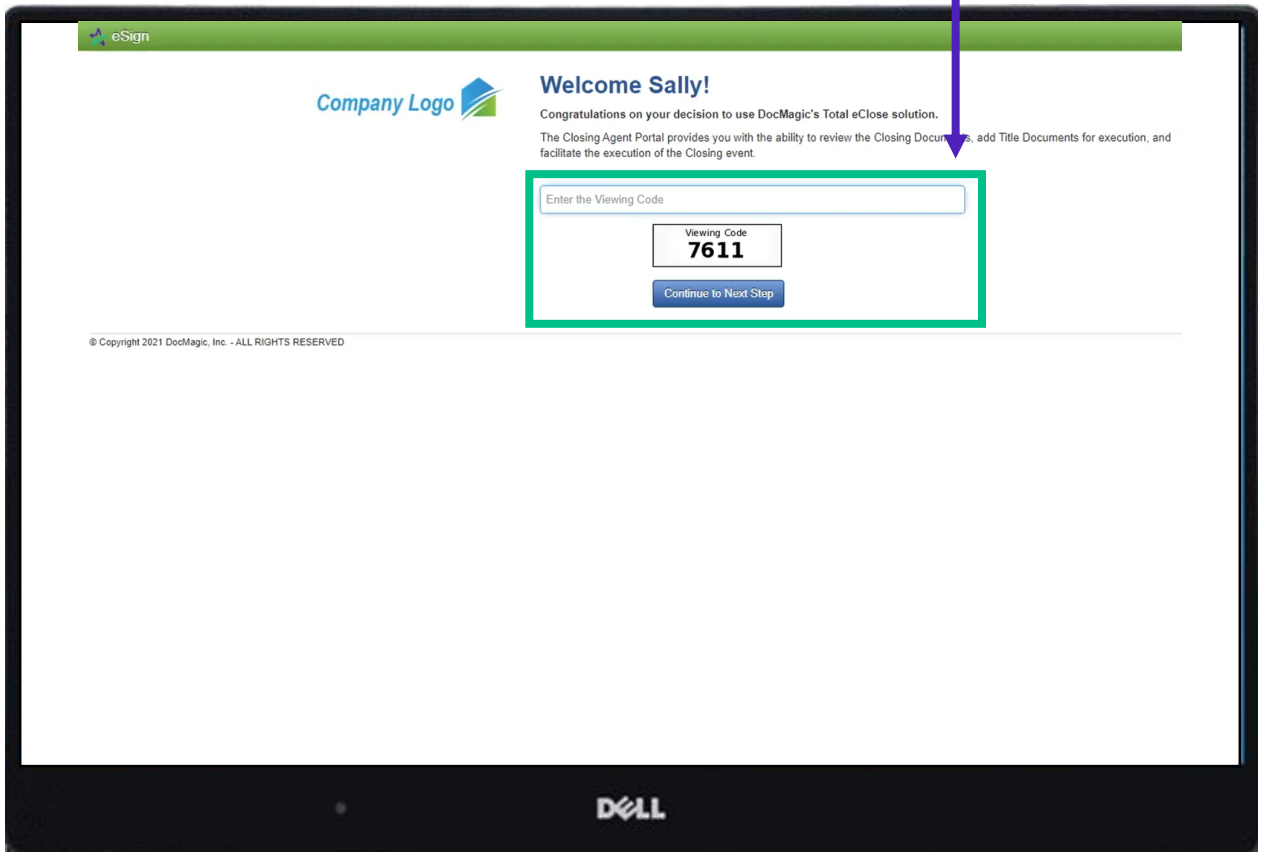
The Settlement Agent will receive an invitation email when the lender creates the eClose event.

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



# Agent Login

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



# eClose Console

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

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

The screenshot displays the DocMagic eClose Console (Settlement Agent) interface. At the top, the DocMagic logo and "eClose Console (Settlement Agent)" are visible, along with a user profile for "Sally".

The main content area is divided into several sections:

- LOAN**: Displays Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, and Worksheet #: 1616630796081 (Version: 1).
- LENDER**: Displays Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, and Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING**: Shows a timer for DAYS, HOURS, MINUTES, and SECONDS. The date is Apr 19, 2023 (Wed) and the time is 12:00am PDT.
- Navigation**: Includes links for Details, eJournal, and Action Log, and a "Ready to Close" button.
- Signers (2)**: A table listing signers with columns for #, Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15)**: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are listed, including Uniform Residential Loan Application, MERS California Deed of Trust, Specific Closing Instructions, California Hazard Insurance Disclosure, Hazard Insurance Authorization and Requirements, and Borrower Consent to the Use of Tax Return Information.

The Dell logo is visible at the bottom center of the screen.



# Countdown Clock

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

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



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

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

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

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

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

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

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

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

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

**DELL**



# Help Button

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

**DocMagic eClose Console (Settlement Agent)**

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

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

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

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.

**Doc Magic eClose Console (Settlement Agent)** Sally ▾

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

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

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

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

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

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

**Documents (15)** [New](#) [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**





# 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 for a signer:

- First Name:** Erica
- Last Name:** Sample
- Email:** erica.sample@example.com
- Phone Number:** ( ) - -
- Access Code:** 0001
- Role:** Borrower

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

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



# Adding Participants

Click on the Silhouette Icon to add a participant.

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

The screenshot displays the DocMagic eClose Console interface. A central 'Add Participant' dialog box is open, prompting the user to enter the following information:

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

At the bottom of the dialog box, there are 'Cancel' and 'Add' buttons. The 'Add' button is highlighted with a green box. In the background, the console shows loan details for Erica Sample, a countdown timer for closing, and a list of documents with columns for '#', 'eSign Enabled', 'Signer(s)', and 'Completed'.

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



# Notary - Signer's Tab

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

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

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

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

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

**Note:** This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose™.



# 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	✉️ ⓪	📄 ⓪	● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15) Preview Mode

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

**Note:** This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose™.



# 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, '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: DISBEST LENDER (SALES), Contact: Michael Morford, Email: mmorford@docmagic.com, Phone: (866) 649-1362.
- COUNTDOWN TO CLOSING:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Signers (2):** A table with the following data:

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room
- Documents (15):** A list of documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed.

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

**Note:** This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose™.



# 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. As a Settlement Agent, you can sign documents without turning off Preview Mode.

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

Details eJournal Action Log Ready to Close

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	Sign
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@exempl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15)

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

Preview Mode

**ATTENTION:** NEVER turn off *Preview Mode* ahead of the closing date. When the clock hits 0, *Preview Mode* will automatically turn off.



# Documents Section

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

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

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

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

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

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

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

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

**Documents (15)** [Print](#) [Edit](#) [Share](#) [Download](#) [Refresh](#) Preview Mode  ON

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

DELL



# 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's 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 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	✓





# 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 displays the DocMagic eClose Console interface for a Settlement Agent. The main area shows a list of 14 documents with their respective page counts and completion status. A green box highlights the 'Print and Sign' section at the bottom, which lists documents requiring wet signatures. A blue arrow points from the text box above to this section.

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



# Adding Documents

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

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

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

A green box highlights a document icon button in the 'Documents (15)' section, and a blue arrow points from the instruction text above to this button.



# Adding Documents

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

The screenshot displays the DocMagic eClose Console interface. At the top, the user is logged in as 'Sally'. The main area shows loan details for Loan # 777-1616630796081, including the Primary Borrower (Erica Sample), Type (EClosing), Package ID (333727), and Worksheet # (1616630796081 (Version: 1)). The Lender is identified as DSI TEST LENDER (SALES), with contact information for Michael Morford. A 'COUNTDOWN TO CLOSING' section shows a timer set to 12:00am PDT on Apr 19, 2023. A 'Ready to Close' button is visible. In the foreground, a Windows 'Open' dialog box is open, showing the Desktop location. The file 'AZACPRS.TTL.pdf' is selected. A green box highlights the 'Browse' button in the dialog, with a blue arrow pointing from the instruction text above to it. Below the dialog, a table of documents is partially visible, with columns for 'Verify / Status' and 'eSign'.

Document Name	Verify / Status	eSign
California Hazard Insurance Disclosure	1	1
Hazard Insurance Authorization and Requirements	2	1
Borrower Consent to the Use of Tax Return Information	1	1

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



# Settlement Agent Portal – Post AutoPrep™

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

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

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

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

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

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

**Signers (2)**

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

**Documents (15)** [+](#) [✎](#) [🖨](#) [📄](#) [📁](#) Preview Mode  ON

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

Hit refresh and your newly uploaded document will show in the documents section.



# Tagging Documents + Guide

Click on the Pencil Icon to open the Document Editor that allows you to tag documents. *We strongly advise you to click [here](#) for the Document Editor guide.*

**DocMagic eClosing Console (Settlement Agent)**

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

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

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

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

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

**Documents (6)** [Pencil Icon] [Print Icon] [Share Icon] Preview Mode: OFF

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

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

**BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION**

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

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

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

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

**John Smith** [Pencil Icon]

Borrower: JOHN SMITH Date: Borrower: Date

Previous Page | Next Page

**Tags**

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



# Restart Meeting

If you're tagging in the middle of a signing, you'll need to restart the meeting for the changes to take effect. From the signing experience, click your name in the top right, then Restart Meeting.

The screenshot displays a DocMagic Notary signing 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, a user profile for "JOHN SMITH" is visible. A dropdown menu is open, showing the following options: "Restart Meeting", "Change Email Address", "Withdraw Consent", "Terms of Use", and "Save & Exit". A green box highlights the "Restart Meeting" option, and a purple arrow points from the text box above to this option. Below the menu, a video feed shows "JOHN SMITH" with a "Signing" indicator.

If repeated technical glitches occur, try [clearing browser cache](#) or running the experience in an [incognito window](#).



# eJournal

The eJournal tab is only used for Hybrid 3 and Total eClose™.

Click on this tab to access the eJournal.

DocMagic eClose Console (Settlement Agent)

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

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

**SETTLEMENT AGENT** Company: Settlement Closing...  
Contact: Sally Settlement  
Email: 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

**Recordings**

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

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



# Action Log

The Action Log is only used for Hybrid 3 and Total eClose™.

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 interface. At the top, the user is identified as 'Sally'. The main content area is divided into several sections: 'LOAN' details (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1)), 'LENDER' information (Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362), and a 'COUNTDOWN TO CLOSING' section showing 0 days, 0 hours, 0 minutes, and 0 seconds as of April 19, 2023, at 12:00am PDT. Below these sections are navigation tabs for 'Details', 'eJournal', and 'Action Log', with 'Action Log' being the active tab. The Action Log table contains the following data:

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

At the bottom of the Action Log section, there is a text input field and a button labeled 'Add Internal Note To Action Log'.

You may also add notes at the bottom.





# Print/Download Documents

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

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

- LOAN**: Loan #: 777-16166307990, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER**: Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING**: A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Signers (2)**: A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower, Not Started) and Sally Settlement (Settlement Agent, Ready to Sign).
- Documents (15)**: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. A green box highlights the printer icon in the document action bar above the 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	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 'Documents (15)' section lists several documents, with the 'Upload' icon highlighted. On the right, a red-bordered box contains the following text:

**IMPORTANT**

**YOU MUST USE THIS AS YOUR COVER SHEET.**

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

**INSTRUCTIONS**

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

At the bottom of the instructions, a QR code is shown with the text '75605744-1' below it. A blue arrow points from the QR code to the bottom text box.

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. The bottom row, 'Multistate Fixed Rate Note', is highlighted with a green border and 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	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	✓
1	Multistate Fixed Rate Note	3/3	1	✓



# Don't Confuse These Two!

As a reminder, this button allows you to upload *new* documents to the package.

The screenshot displays the DocMagic eClose Console for a 'Settlement Agent'. The interface includes sections for LOAN details, LENDER information, and a COUNTDOWN TO CLOSING timer. Below these are tabs for Details, eJournal, and Action Log. A 'Signers (2)' table lists Erica Sample (Borrower) and Sally Settlement (Settlement Agent). The 'Documents (15)' section features a toolbar with icons for document management, including a green-bordered icon for uploading new documents. A table below lists six documents with their page counts and completion status.

#	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	✓

This one lets you upload *ink-signed* documents.

NOTE: It is *extremely important* that you do not mix up these two buttons and upload documents to the wrong place.



# 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, overlaying the main console. The modal contains the following elements:

- Notary Provider:** A dropdown menu with "Select" as the current value.
- Notary Type:** Two radio button options: "In Person" and "Remote Online Notary (RON)".
- Signers:** A table listing the participants for the closing.
- Request Summary:** A section providing details about the closing, including the estimate closing date and time.
- Buttons:** "Cancel" and "Assign Notary" buttons at the bottom of the modal.

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

**Note:** This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose™.



# 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 columns for Name, Email, Role, and Phone. One signer is listed: JOHN SMITH, aland@docmagic.com, Borrower, with Home and Mobile phone numbers.
- Request Summary:** 1 participants for a In Person eClosing for a property in Sample, NJ. Includes fields for Estimate Closing Date (2/14/2023), Time, and Location (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 for "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 or DocMagic RON, 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 configuration for assigning a notary. The "Notary Provider" is set to "NotaryCam". The "Notary Type" dropdown is highlighted with a green box, and "Remote Online Notary" is selected. The "Signers" table lists two signers: Erica Sample (Borrower) and Sally Settlement. The "Request Summary" indicates 1 participant for a RON eClosing in Torrance, CA, with an estimated closing date of 3/25/2021 at 12:00 AM in the America/Los Angeles time zone. The "Assign Notary" button is highlighted in blue.

#	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...				

#	eSign Enabled	Completed
1	Uniform Residential	✓
2	MERS California De	✓
3	Specific Closing Inst	✓
4	California Hazard In	✓
5	Hazard Insurance Authorization and Requirements	1
6	Borrower Consent to the Use of Tax Return Information	1





# Assign a Notary

If you select *NotaryCam* as your Notary Provider, you will only need to set the closing date and time. *NotaryCam* services are not available on mobile devices.

The screenshot displays the 'Assign / Notify Notary' modal in the DocMagic eClose Console. The modal is titled 'Assign / Notify Notary' and features a close button (X) in the top right corner. It is divided into several sections:

- Notary Provider:** A dropdown menu with 'NotaryCam' selected.
- Notary Type:** A required field with two options: 'In Person' (radio button) and 'Remote Online Notary' (radio button, selected).
- Signers:** A table listing the participants in the closing.
- Request Summary:** A section containing the closing date and time.
- Buttons:** 'Cancel' and 'Assign Notary' buttons at the bottom.

#	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

Click "Assign Notary" when done.



# 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

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

Start by entering your search parameters for a DocMagic Remote Online Notary and hit Search.

**Note:** The search functions only returns 25 results. If you do not see your notary, please try a more specific search.



# Assign a Notary

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

The screenshot displays the 'Assign / Notify Notary' window in the DocMagic eClose system. The window is divided into several sections:

- Search Form:** Includes fields for 'Notary Provider' (set to 'DocMagic RON'), 'Notary Type' (radio buttons for 'In Person' and 'Remote Online Notary (RON)', with 'RON' selected), and a search grid with columns for 'Company Name', 'First Name', 'Last Name', 'Client ID', 'City', 'County', 'State', and 'Zip'. A 'Search' button is located at the bottom right of the grid.
- Search Results:** A table with columns for selection, name, email, and status. The third row is selected with a radio button.
- Request Summary:** Shows '1 participants for a RON eClosing for a property in Sample, NJ.' and fields for 'Estimate Closing Date' (12/21/2022), 'Time' (01:00 PM), and 'America/Los Angeles'.
- Buttons:** 'Cancel' and 'Request Notary Services' buttons are at the bottom.

	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

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**  
 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**

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, if a Remote Online Notary is required.

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

Key sections of the interface include:

- LOAN:** Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER:** Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Buttons:** "Ready to Close" (highlighted with a red box and an arrow from the text box), "Notify", "NotaryCam", "Open Signing Room", and "Preview Mode ON".
- Signers (2):** A table listing two signers: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- 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.

Note: This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose™.



# Switching Notaries

If – for whatever reason – you need to assign another notary, click on the “Notify” button, which will activate the selection window.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent named Byron. The top navigation bar includes the DocMagic logo, the user name 'Byron', and a dropdown arrow. Below the navigation bar, there are three main sections: 'LOAN' details (Loan #: 777122120230001, Primary Borrower: Stephen Truitt, Type: EClosing, Package ID: 101462815, Worksheet #: 1138 (Version: 1)), 'LENDER' details (Company: D TEST LENDER (SALES), Contact: Stephen Truitt, Email: struitt@docmagic.com, Phone: (800) 463-9056), and a 'COUNTDOWN TO CLOSING' section (Date: Jan 9, 2024 (Tue) Time: 10:00am PST). Below these sections are tabs for 'Details', 'eJournal', and 'Action Log'. A 'Start eClosing' button is visible in the top right. The main content area is titled 'Signers (5)' and contains a table with 5 rows of signer information. A 'Notify' button is highlighted with a green box, and a blue arrow points from the text box above to it. Below the signers table is a 'Documents (25)' section with a 'Preview Mode' toggle set to 'OFF'. The Dell logo is visible at the bottom center of the screen.

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Stephen Truitt struitt@docmagic.com	Borrower	Tiffany Roberts enotaryoftexas@gmail.com	DocMagic RON 1/9/2024 - 10:00am			Finished	Open Signing Room
2	Byron Settlement struitt@docmagic.com	Settlement Agent					Ready to Sign	Open Signing Room
3	Steve Truitt struitt221@gmail.com	Witness	Tiffany Roberts enotaryoftexas@gmail.com	DocMagic RON 1/9/2024 - 10:00am			Not Started	Open Signing Room
4	Youssef Aissa Ydsg@docmagic.com	Witness					Ready to Sign	Open Signing Room
5	Scott Seller scott@seller.com	Seller					Ready to Sign	Open Signing Room

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Freeze/Close Letter	1	1	
2	Multistate Fixed Rate Electronic Note	4	1	
3	Uniform Residential Loan Application	8	2	



# Switching Notaries

Making sure DocMagic RON is chosen, click on the icon here to reactivate the search parameters.

The screenshot shows the DocMagic eClose Console interface. A modal window titled "Assign / Notify Notary" is open. In the "Notary Type" section, "Remote Online Notary (RON)" is selected. A search icon (magnifying glass) is highlighted with a green box, and a blue arrow points from the text above to it. The dialog box contains fields for "Notary Provider" (DocMagic RON), "Notary Type" (In Person, Remote Online Notary (RON)), and a search form with fields for Company Name, First Name, Last Name, Client ID, City, County, State (MD), and Zip. A "Search" button is present. Below the search form is a table of signers and notaries.

Signers		Notaries	
Name	Email	Role	Phone
STEPHEN TRUITT	struitt@docmagic.com	Borrower	Home: (310) 555-1212 Mobile: (310) 463-9056
Steve Truitt	struitt221@gmail.com	Witness	

Request Summary

2 participants for a RON eClosing for a property in Indianapolis, MD.

\*Estimate Closing Date: 1/9/2024 \*Time: 10:00 AM America/Los Angeles

Buttons: Cancel, Notify



# Switching Notaries

Choose the new Notary, making sure to double check the date and time. Then hit "Request Notary Services."

**Assign / Notify Notary**

**Notary Provider**: DocMagic RON

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

**Search**

Company Name	First Name	Last Name	Client ID
City	County	State	Zip
		NJ	
<input type="checkbox"/> RON Capable <input type="button" value="Search"/>			

**Notaries**

	Company Name	First Name	Last Name	Email	Yes	Yes
<input type="radio"/>	DOCAGIC NOTARY	ssamah@docmagic.com	ssamah@docmagic.com	ssamah@docmagic.com	Yes	Yes
<input checked="" type="radio"/>	DOCAGIC NOTARY	struitt@docmagic.com	struitt@docmagic.com	struitt@docmagic.com	Yes	Yes
<input type="radio"/>	DOCAGIC NOTARY	ward@docmagic.com	ward@docmagic.com	ward@docmagic.com	Yes	Yes
<input type="radio"/>	DOCAGIC NOTARY	youssef@docmagic.com	youssef@docmagic.com	youssef@docmagic.com	Yes	Yes
<input type="radio"/>	DOCAGIC NOTARY	yportnaya@docmagic.com	yportnaya@docmagic.com	yportnaya@docmagic.com	Yes	Yes

**Request Summary**

2 participants for a RON eClosing for a property in Indianapolis, MD.

\*Estimate Closing Date: 1/9/2024 \*Time: 10:00 AM America/Los Angeles





# Switching Notaries

Confirm that you want to switch Notaries, and the new Notary will be notified by email.

The screenshot displays the DocMagic eClose Console interface. At the top, the user is logged in as 'Byron'. The main area shows loan details (Loan #: 777122120230001, Primary Borrower: Stephen Truitt) and lender information (DSI TEST LENDER (SALES), Contact: Stephen Truitt). A 'COUNT DOWN TO CLOSING' section shows a timer for July 9, 2024, at 10:00am PST. A 'Signers (5)' table lists participants: Stephen Truitt (Borrower), Byron Settlement (Settlement Agent), Steve Truitt (Witness), Youssef Aissa (Witness), and Scott Sellar (Seller). A 'Documents (25)' table lists 'Freeze/Close Letter' and 'Multistate Fixed Rate Electronic Note'. A modal dialog titled 'Confirm Notary Assignment' is centered, asking for confirmation to replace Tiffany Roberts. A blue arrow points from the text box above to the 'Continue' button in the dialog.

#	Signer Name / Email	Role	Notary	Status	eSign
1	Stephen Truitt struitt@docmagic.com	Borrower	Tiffany Roberts	Finished	Open Signing Room
2	Byron Settlement struitt@docmagic.com	Settlement Agent	Tiffany Roberts	Ready to Sign	Open Signing Room
3	Steve Truitt struitt221@gmail.com	Witness	Tiffany Roberts	Not Started	Open Signing Room
4	Youssef Aissa Ydog@docmagic.com	Witness	Tiffany Roberts	Ready to Sign	Open Signing Room
5	Scott Sellar scott@sellar.com	Seller	Tiffany Roberts	Ready to Sign	Open Signing Room

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Freeze/Close Letter	1	1	✓
2	Multistate Fixed Rate Electronic Note	4	1	✓



# 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 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.

A callout box from the text above points to a 'Preview Mode' toggle switch located in the bottom right corner 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	✓



# Your Turn to Sign

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

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

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

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

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

Ready to Close

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉️ ⓪	📄 ⓪	● Finished	Open Signing Room
2	Sally Settlement sally.settlement@exempl...	Settlement Agent	Unassigned				● Ready to	Open Signing Room

Documents (16)

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

Preview Mode ON

DELL



# 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	✓

