



Settlement Agent eClose Console with AutoPrep™

GUIDEBOOK

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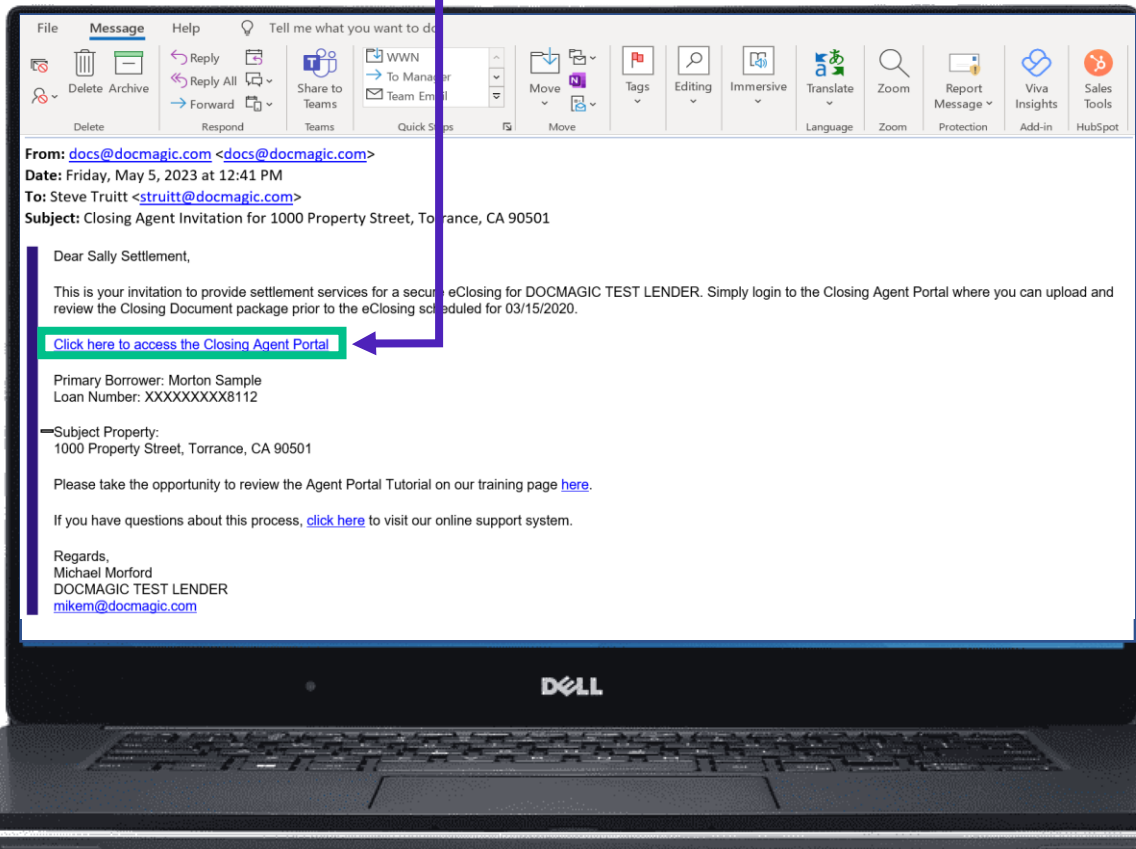
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Settlement Agent Invitation Email

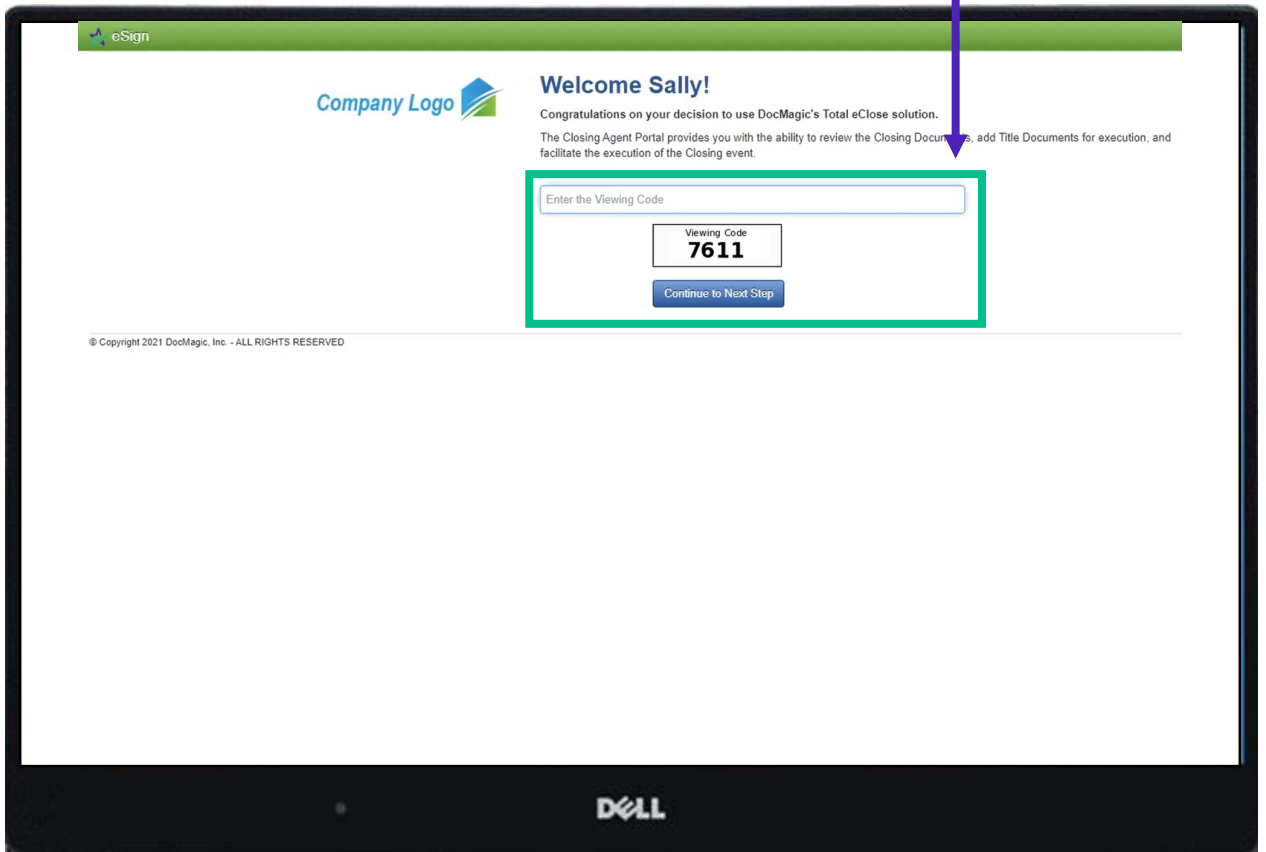
The Settlement Agent will receive an invitation email when the lender creates the eClose event.

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.



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

Documents (15) [📄](#) [✎](#) [🖨](#) [📁](#) [🔍](#) Preview Mode

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

DELL



Help Button

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

DocMagic eClose Console (Settlement Agent)

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

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

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

Dashboard
My Account
Preferences
Contact Us
Help
Sign Out

Signers (2)

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

Documents (15)

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

Preview Mode ON



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

Documents (15) [Print](#) [Edit](#) [Share](#) [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	✓



Signer's Details

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

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

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

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

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



Adding Participants

Click on the Silhouette Icon to add a participant.

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

The screenshot shows the DocMagic eClose Console interface. A modal window titled "Add Participant" is open, allowing users to add a new participant to the closing process. The background shows loan details, a countdown to closing, and a list of documents.

Signers (2)

#	Signer Name / Email	Role
1	Erica Sample erica.sample@example.c...	Borrower
2	Sally Settlement sally.settlementi@exampl...	Settlement Agent

Documents (15)

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

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



Notary - Signer's Tab

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

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

- LOAN:** Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER:** Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Signers (2):** A table with columns: #, 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 with columns: #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are listed, including 'Uniform Residential Loan Application', 'MERS California Deed of Trust', and 'Borrower Consent to the Use of Tax Return Information'.

A green box highlights the 'KBA / Status' and 'ID Verify / Status' columns in the Signers table, with a purple arrow pointing from the text above to this area.

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 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

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.

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: DISBEST LENDER (SALES) | Contact: Michael Morford | Email: mmorford@docmagic.com | Phone: (866) 649-1362

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

Signers (2)

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

Documents (15) | Preview Mode: 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	✓

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 ON

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.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the user's name 'Sally', and the role 'Settlement Agent'. 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. The table is highlighted with a green border.

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



Documents Section

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

DocMagic eClose Console (Settlement Agent) | Sally

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

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

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

Signers (2)

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

Documents (15) | Preview Mode: ON

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



Documents Section

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

The screenshot 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 the number of signers. A green box highlights the 'Print and Sign' section at the bottom, which lists documents that require 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 options.
- Documents (15)** section: A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed status.

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.

#	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_PLAC...	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	✓



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 console, 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 lists documents with columns for document name, status, and eSign status.

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

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

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

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



Tagging Documents + Guide

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

The screenshot shows the DocMagic eClosing Console for a Settlement Agent. The top navigation bar includes the DocMagic logo, 'eClosing Console (Settlement Agent)', and a user profile icon labeled 'Doc'. Below the navigation bar, there are three main sections: LOAN, LENDER, and SETTLEMENT AGENT. The LOAN section displays Loan #: 16364816201, Primary Borrower: John Smith, Type: eClosing, Package ID: 417659, and Worksheet #: 16364816201. The LENDER section shows Company: SAMPLE SONS L., Contact: Michael Morford, Email: mikem@docmagic.com, and Phone: (555) 555-5555. The SETTLEMENT AGENT section shows Company: Settlement Closing, Contact: Sally Settlement, Email: struitt@docmagic.com, and Phone: (987) 555-4321. A 'COUNTDOWN TO CLOSING' widget shows 0 days, 0 hours, 0 minutes, and 0 seconds, with a date of April 19, 2023 (Wed) at 12:00am PDT. Below these sections are tabs for Details, eJournal, and Action Log, and a 'Start eClosing' button. The 'Signers (3)' section 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. The table lists three signers: John Smith (Borrower), Oliver Originator (Originator), and Sally Settlement (Settlement Agent). Below the signers is a 'Documents (6)' section with a pencil icon highlighted in a green box. The document viewer shows a 'Uniform Residential Loan Application' form with various fields for borrower information, mortgage type, and property details. A right-hand sidebar contains a 'Signature & Initials' panel with options for Signature, Initials, PostFill, Textbox, Phone Number, Date, Checkbox, Radio, Notary, and Notary Name.



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

- LOAN:** Loan #: 777-16166307990, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER:** Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds, with a date of Apr 19, 2023 (Wed) and time of 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 a printer icon in the document action bar above this 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 in a green box. A red-bordered callout box contains the following text:

IMPORTANT

YOU MUST USE THIS AS YOUR COVER SHEET.

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

INSTRUCTIONS

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

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

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



Wet-sign Options

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

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent named Sally. The main content area shows a list of 14 documents, each with a number, title, page count, and number of signers. A green checkmark is visible in the 'Completed' column for document 11, 'Initial Amortization Schedule'. A second table at the bottom, titled '# Print and Sign', shows a document 'Multistate Fixed Rate Note' with 3/3 pages, 1 signer, and a green checkmark in the 'Completed' column. A blue arrow points from the text box above to the green checkmark in the second table.

#	Print and Sign	Page(s)	Signer(s)	Completed
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 documents such as 'Uniform Residential Loan Application' and 'MERS California Deed of Trust'.

#	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@example.c	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	✓

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 application. 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 with the following data:

Name	Email	Role	Phone
JOHN SMITH	aland@docmagic.com	Borrower	Home: (502) 767-8509 Mobile: (562) 652-2578
- Request Summary:** A text box stating "1 participants for a In Person eClosing for a property in Sample, NJ." Below this, there are fields for "Estimate Closing Date" (2/14/2023), "Time" (12:00 AM), and "America/Los Angeles".
- Buttons:** "Cancel" and "Assign Notary" buttons are located at the bottom of the modal.

The background interface shows a "LOAN" summary, a list of "Signers (2)" including Erica Sample and Sally Settlement, and a list of "Documents (16)" such as "Uniform Residential Loan App" and "MERS California Deed of Trust".

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 2 signers:

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

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

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



Assign a Notary

Set the closing date and time.

DocMagic eClose Console (Settlement Agent) Sally

Assign / Notify Notary

***Notary Provider**
WVN

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

Signers

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

Request Summary

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

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

Cancel Assign Notary

Click "Assign Notary" when done.



Assign a Notary

If your Notary Provider is NotaryCam 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. Below this, a table lists the signers, and a "Request Summary" section shows the closing date and time. The "Assign Notary" button is visible at the bottom of the modal.

#	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



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.

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

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 user name 'Sally', and a dropdown menu. 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 red-bordered 'Ready to Close' button with a NotaryCam icon.
- Signers (2):** A table listing two signers: Erica Sample (Borrower) and Sally Settlement (Settlement Agent). The Settlement Agent is marked as 'Ready to Sign'.
- Documents (16):** A table listing six documents, all of which are completed.

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

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

Note: NotaryCam is currently only able to process the loan once per package. Please ensure that all documents to be included in the signing ceremony are prepared and uploaded prior to selecting "Ready to Close".



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.



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)'), 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 includes 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.

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

- Notary Provider:** A dropdown menu set to 'DocMagic RON'.
- Notary Type:** Radio buttons for 'In Person' and 'Remote Online Notary (RON)'. 'Remote Online Notary (RON)' is selected.
- Search:** Fields for Company Name, First Name, Last Name, Client ID, City, County, State, and Zip. A 'Search' button is present.
- Notaries List:** A table of notaries with columns for selection, name, email, and status. The first notary, 'struitt@docmagic.com', is selected.
- Request Summary:** A section containing a summary of the request 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 located at the bottom.

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.

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 **Notify**

Signers (2)

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

Documents (16) Preview Mode

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

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.

DocMagic eClose Console (Settlement Agent) | Byron

LOAN | Loan #: 777122120230001
Primary Borrower: Stephen Truitt
Type: EClosing
Package ID: 101462815
Worksheet #: 1138 (Version: 1)

LENDER | Company: D TEST LENDER (SALES)
Contact: Stephen Truitt
Email: struitt@docmagic.com
Phone: (817) 463-9056

COUNTDOWN TO CLOSING
DAYS: - | HOURS: - | MINUTES: - | SECONDS: -
Date: Jan 9, 2024 (Tue) Time: 10:00am PST

Signers (5)

#	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

Documents (25) | Preview Mode: OFF

#	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"/>			

Signers | **Notaries**

	Notary Name	Email	Yes	Yes
<input type="radio"/>	DOCAGIC NOTARY ssamah@docmagic.com	ssamah@docmagi...	Yes	Yes
<input checked="" type="radio"/>	DOCAGIC NOTARY struitt@docmagic.com	struitt@docmagi...	Yes	Yes
<input type="radio"/>	DOCAGIC NOTARY ward@docmagic.com	ward@docmagic.c...	Yes	Yes
<input type="radio"/>	DOCAGIC NOTARY youssef@docmagic.com	youssef@docmagi...	Yes	Yes
<input type="radio"/>	DOCAGIC NOTARY yportnaya@docmagic.com	yportnaya@docma...	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 is divided into sections: 'LOAN' (Loan #: 777122120230001, Primary Borrower: Stephen Truitt), 'LENDER' (Company: DSI TEST LENDER (SALES), Contact: Stephen Truitt), and 'COUNT DOWN TO CLOSING' (Date: Jul 9, 2024 (Tue) Time: 10:00am PST). A 'Start eClosing' button is visible. Below this is a 'Signers (5)' table:

#	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 Seller scott@seller.com	Seller	Tiffany Roberts	Ready to Sign	Open Signing Room

Below the signers is a 'Documents (25)' section with a table:

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

A modal dialog box titled 'Confirm Notary Assignment' is overlaid on the screen. It contains the text: 'You are about to assign a new notary and replace Tiffany Roberts, proceed?'. There are two buttons: 'Cancel' and 'Continue'. A blue arrow points from the text box above to the 'Continue' button.



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

- LOAN:** Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER:** Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING:** A timer showing 0 days, 0 hours, 0 minutes, and 0 seconds. Date: Apr 19, 2023 (Wed) Time: 12:00am PDT.
- Signers (2):** A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign options.
- Documents (16):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed.

A callout box from the text above points to the 'Preview Mode' toggle, 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@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	✓



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	✓

