



Initial Disclosures  
&  
Closing Packages

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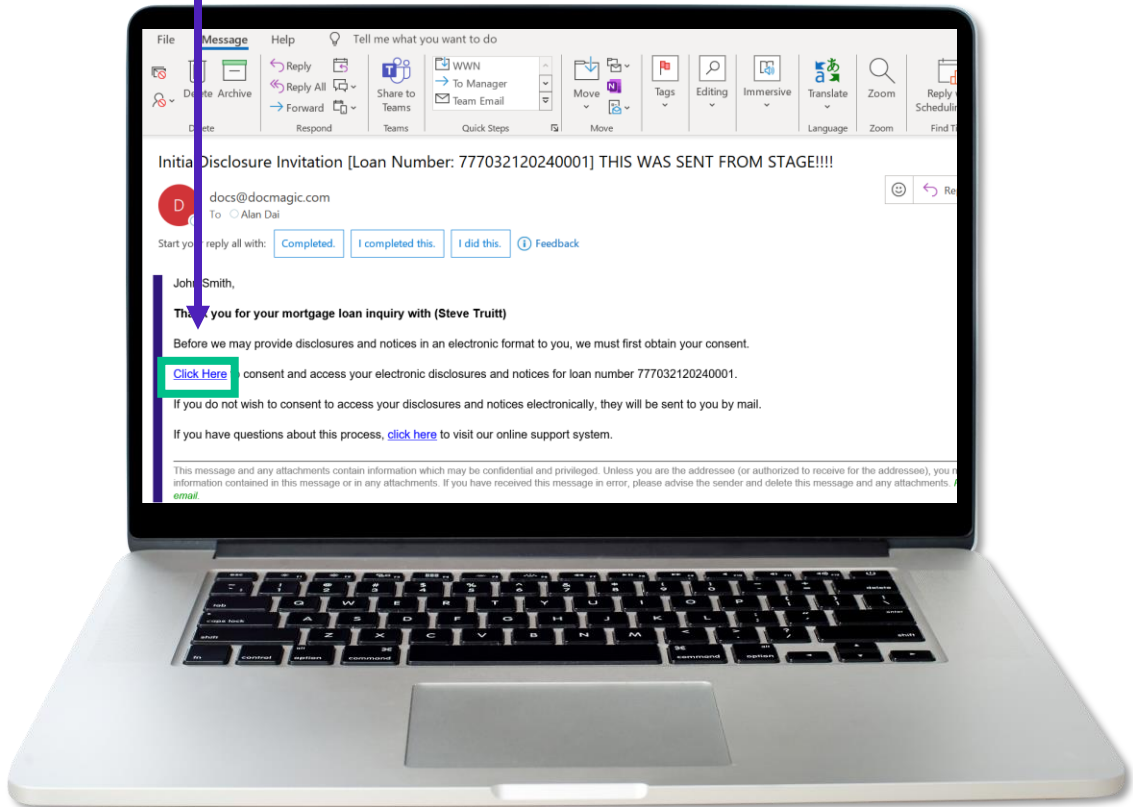
# Initial Disclosures



# eSign for Borrower – Initial Disclosures

## Email Invite

You will get an email inviting you to access the signing portal for your set of initial disclosures.



The signing experience can also be done using a mobile device. Click [here](#) for that guide.

Please note that if you do not respond to this request within 24 hours, your document package may be printed out and mailed to you.



# eSign for Borrower – Initial Disclosures

## Logging In

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

The screenshot shows a laptop displaying the DocMagic login interface. The page has a purple background. At the top left is the DocMagic logo. Below it, it says 'Welcome Michael Sample!'. A message reads: 'To begin the review and signing of your documents, complete the following information.' Below this is a white form with a green border. The form contains three input fields: 'Last 4 digits of your SSN' (with four dots), 'Property Zip Code' (with '90501' entered), and 'Enter Viewing Code' (with '1370' entered and a '1370' button next to it). Below the form is a checked checkbox with the text 'I have read & agree to the eSign Disclosure and consent in its entirety.' and a 'Get Started' button.

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

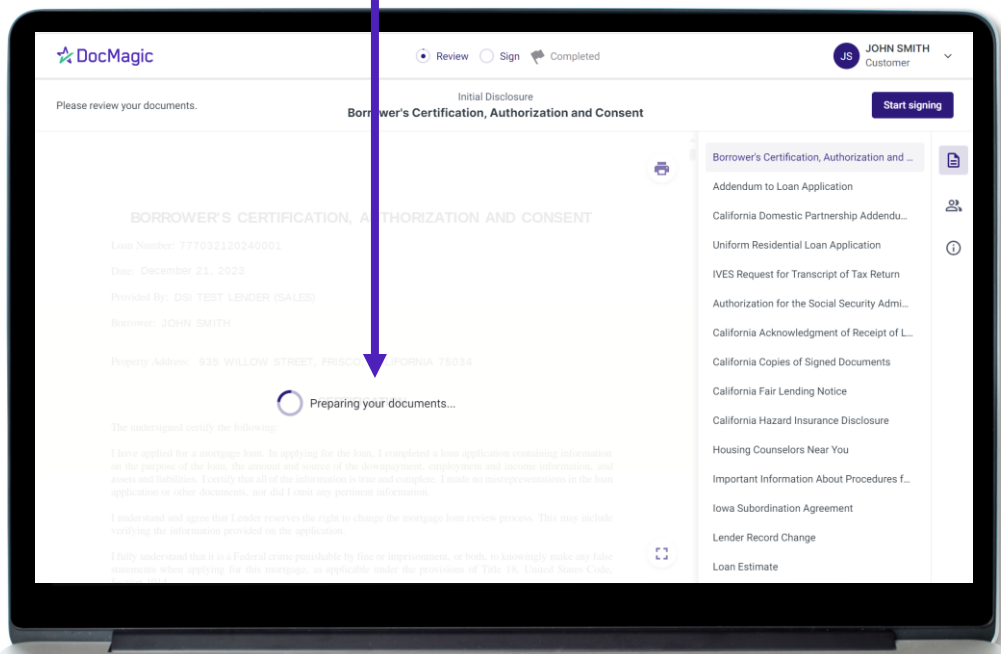
If you get a "login error" message, close the tab and re-open this page from the link in your email.



# eSign for Borrower – Initial Disclosures

## Preparing Your Documents

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



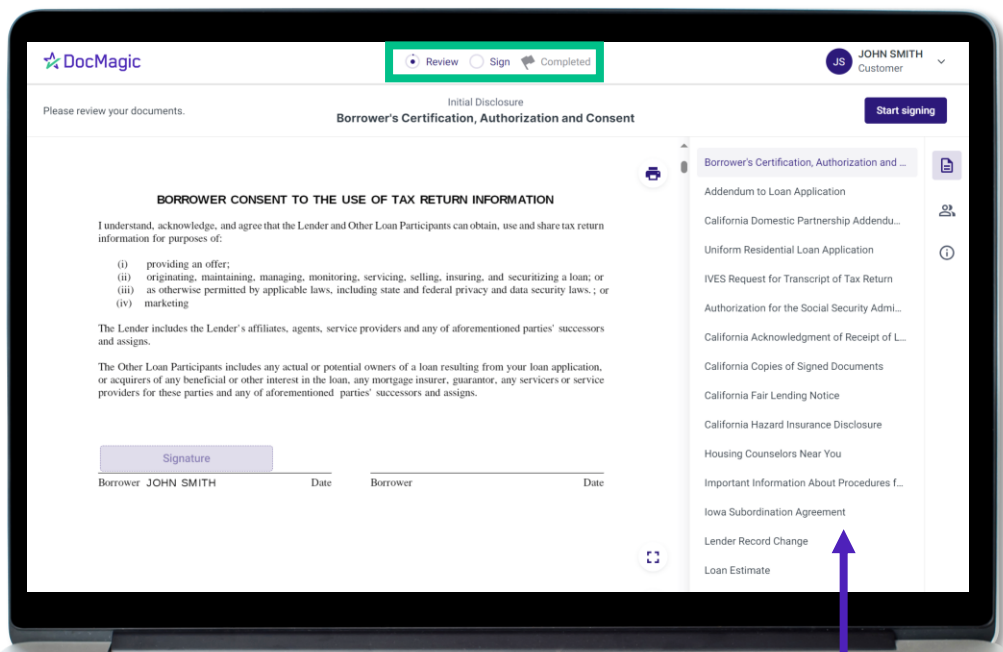
The system will automatically take you to the first document that needs to be signed.



# eSign for Borrower – Initial Disclosures

## Page Features

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



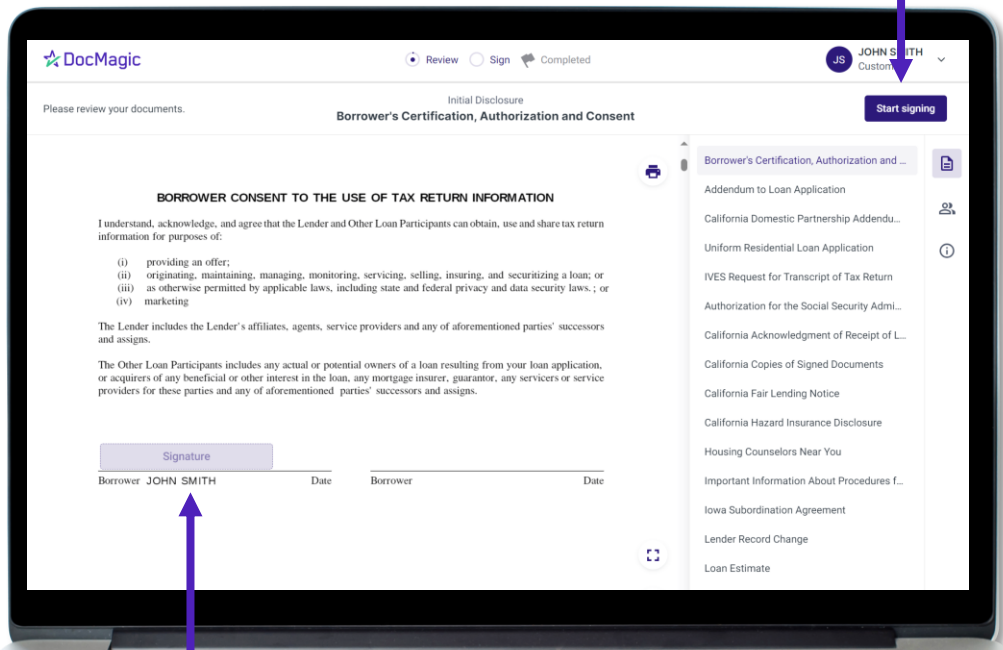
All documents are listed in this column on the right.



# eSign for Borrower – Initial Disclosures

## Page Features

“Start signing” begins the signing process.



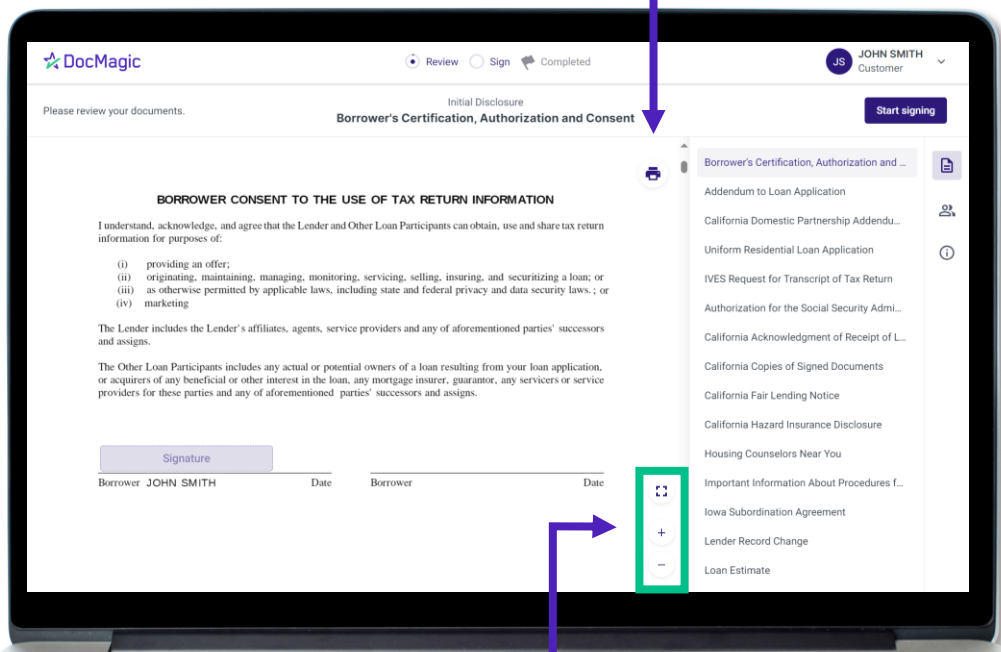
You can't sign anything until you hit the purple button in the top right corner – until then, this will remain greyed out and you won't be able to sign.



# eSign for Borrower – Initial Disclosures

## Page Features

The printer icon allows you to print the documents.



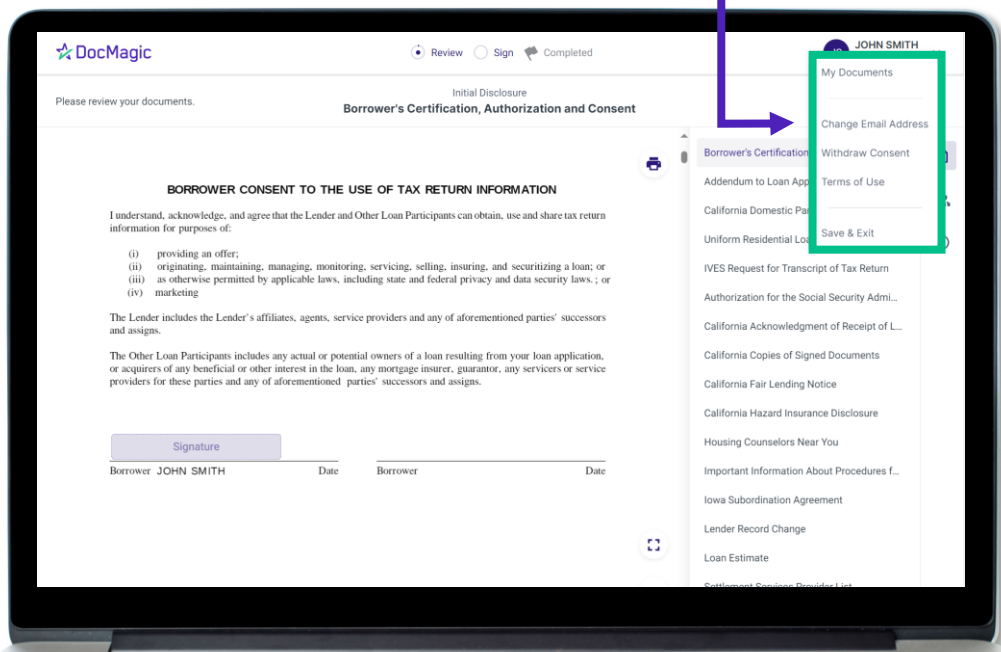
You can expand the signing window and increase or decrease the zoom levels.



# eSign for Borrower – Initial Disclosures

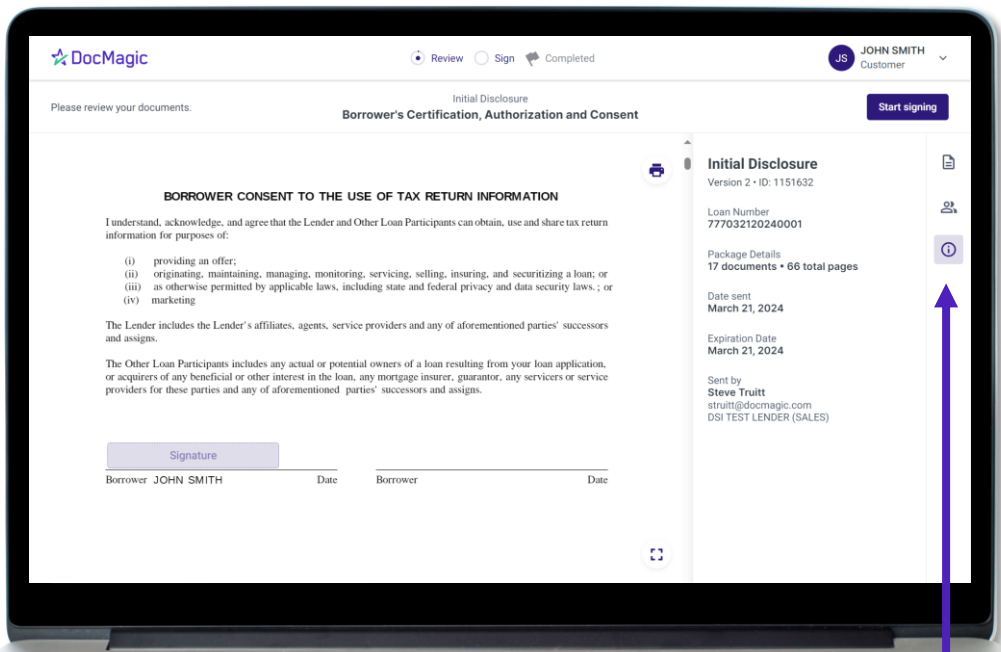
## Page Features

Your information can be viewed and edited here (click on your name).



# eSign for Borrower – Initial Disclosures

## Page Features

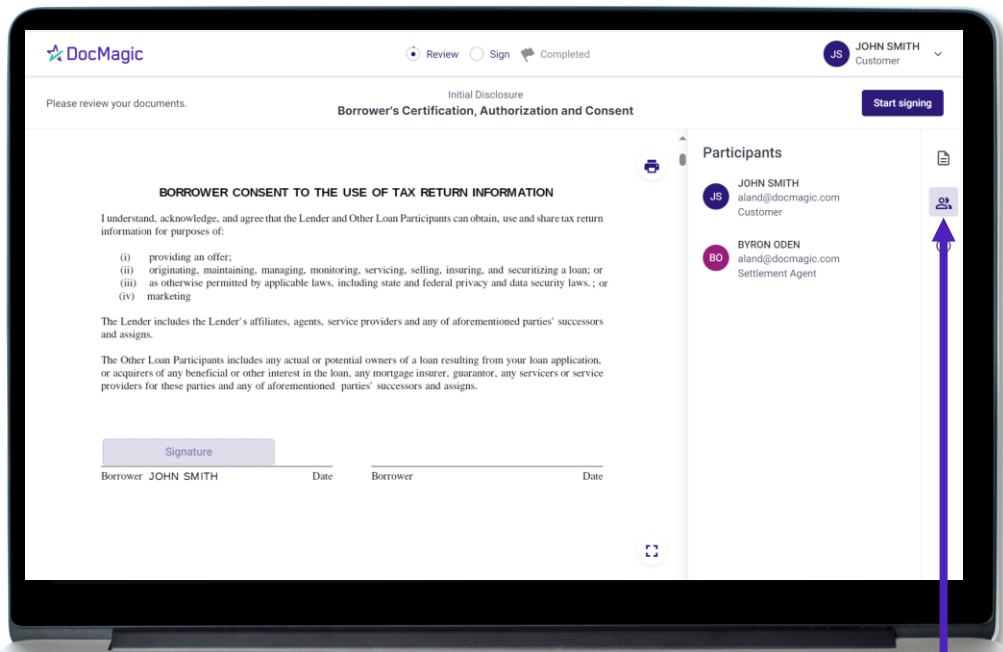


Click the information icon to see document package metadata.



# eSign for Borrower – Initial Disclosures

## Page Features



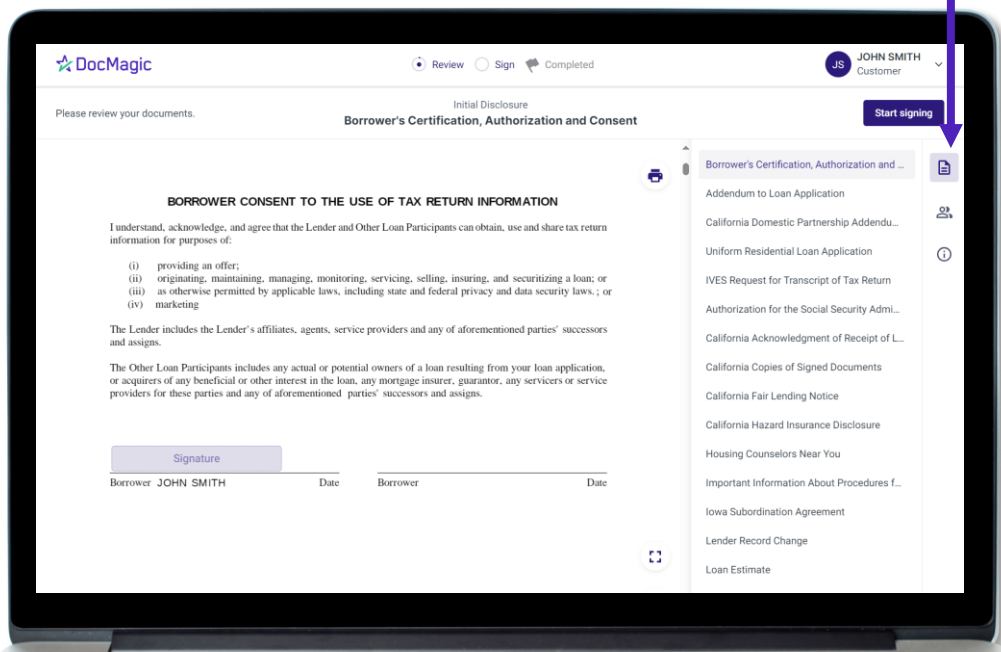
Click here to view participants.



# eSign for Borrower – Initial Disclosures

## Page Features

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

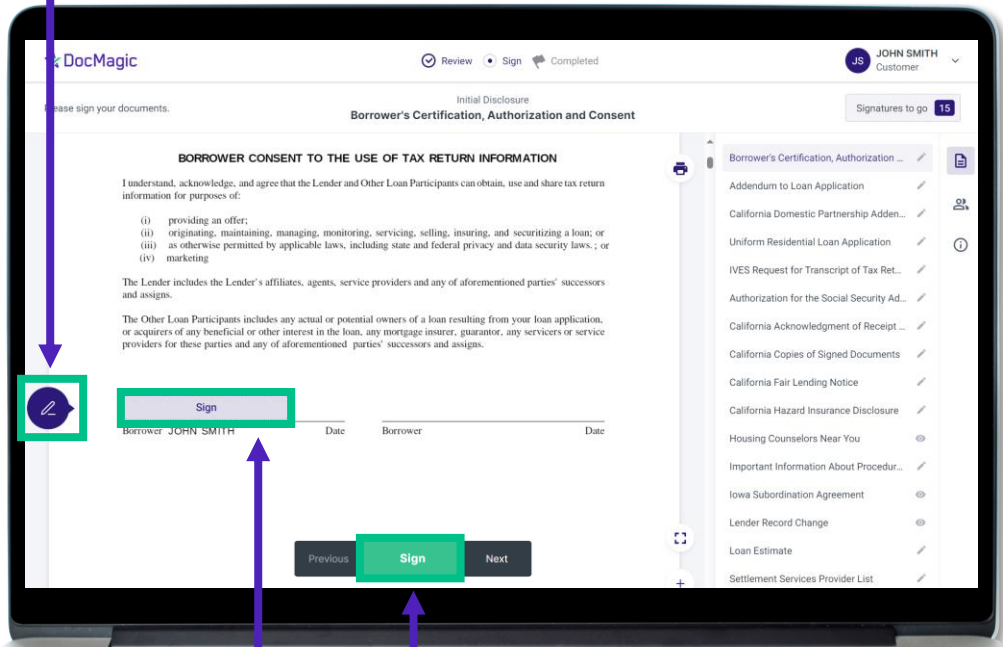


# eSign for Borrower – Initial Disclosures

## Click Signing

There are three options for click-signing.

1. Clicking the pen icon.



2. Clicking on the "Sign" box directly.

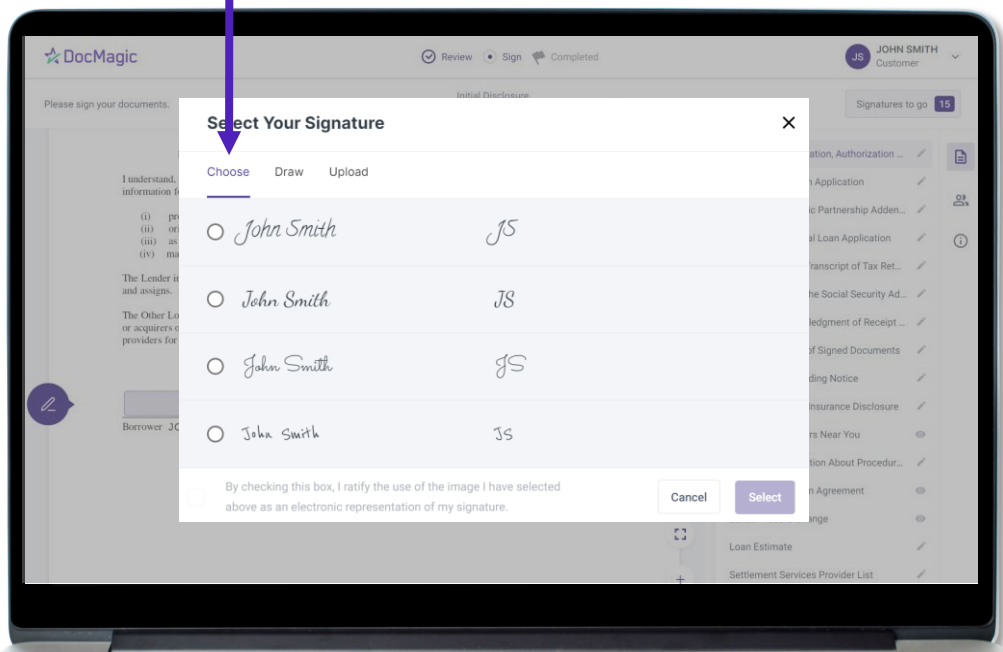
3. Clicking on the Green Sign box will automatically advance to the next task each time.



# eSign for Borrower – Initial Disclosures

## Signature Options

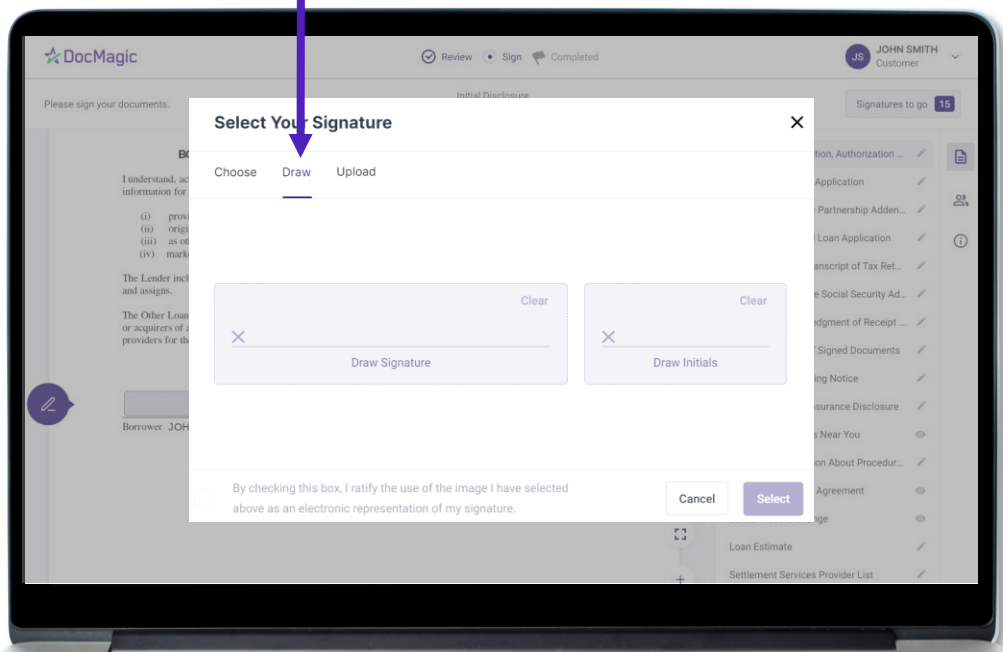
You have the option to choose the pre-formed signatures available in this tab.



# eSign for Borrower – Initial Disclosures

## Signature Options

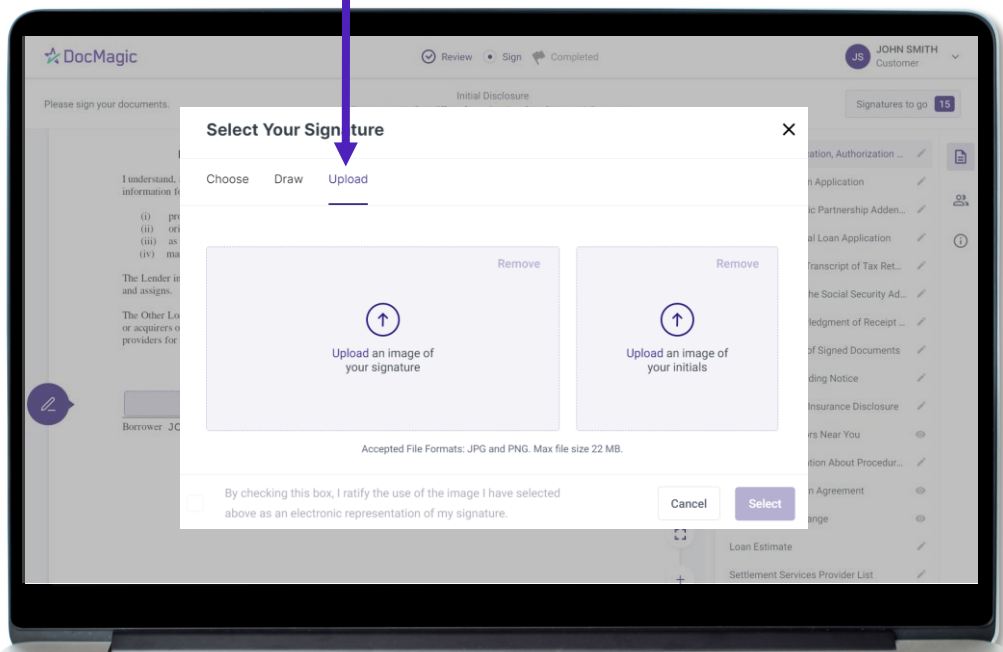
You can also create a signature and initials using this tab.



# eSign for Borrower – Initial Disclosures

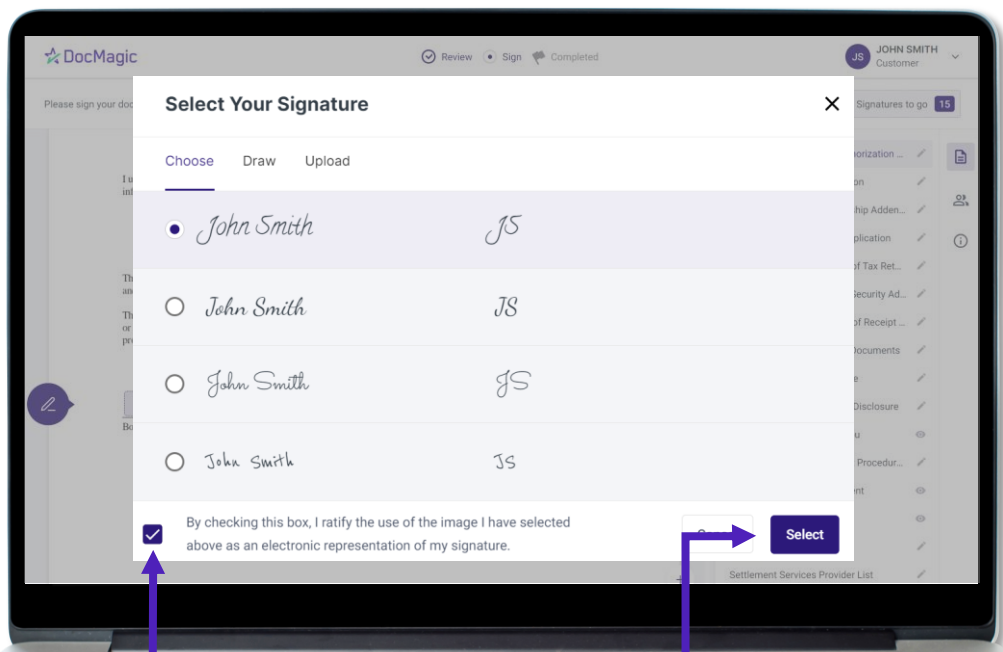
## Signature Options

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



# eSign for Borrower – Initial Disclosures

## Signature Options



Regardless of what option is chosen, you must check the box authorizing the use of an electronic signature and then hit Select.



# eSign for Borrower – Initial Disclosures

## Signature Options

DocMagic | Review | Sign | Completed | JOHN SMITH Customer | Signatures to go 10

Please sign your documents. Initial Disclosure  
IVES Request for Transcript of Tax Return

**Lender Name:** DSI TEST LENDER (SALES) | **Phone Number:** (800) 649-1362

**Street Address (including apt., room, or suite no.):** 1800 W. 213TH STREET | **City:** TORRANCE | **State:** CA | **Zip Code:** 90501

**Caution:** This tax transcript is being sent to the third party entered on Line 5a and/or 5b. Ensure that lines 5 through 9 are completed before signing. (See instructions)

**6. Transcript requested.** Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request for line 6 transcripts.

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

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

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

**10. Enter the ending date of the taxpayer or period being the mm / dd / yyyy format (see instructions)**

**11. Enter the ending date of the taxpayer or period being the mm / dd / yyyy format (see instructions)**

**Caution:** Do not sign this form unless all applicable lines have been completed.

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

**Signature for Line 1a (see instructions)** | **Sign** | **Date** | **Phone number of taxpayer on line 1a or 2a**

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

**Print/Type name:** JOHN SMITH

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

**Spouse's signature (required if listed on Line 2g)** | **Date**

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

**Print/Type name**

Calling Number 726277 | [www.irs.gov](http://www.irs.gov) | Form 4506-C (Rev. 10-2022)

Previous | Check | Next

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

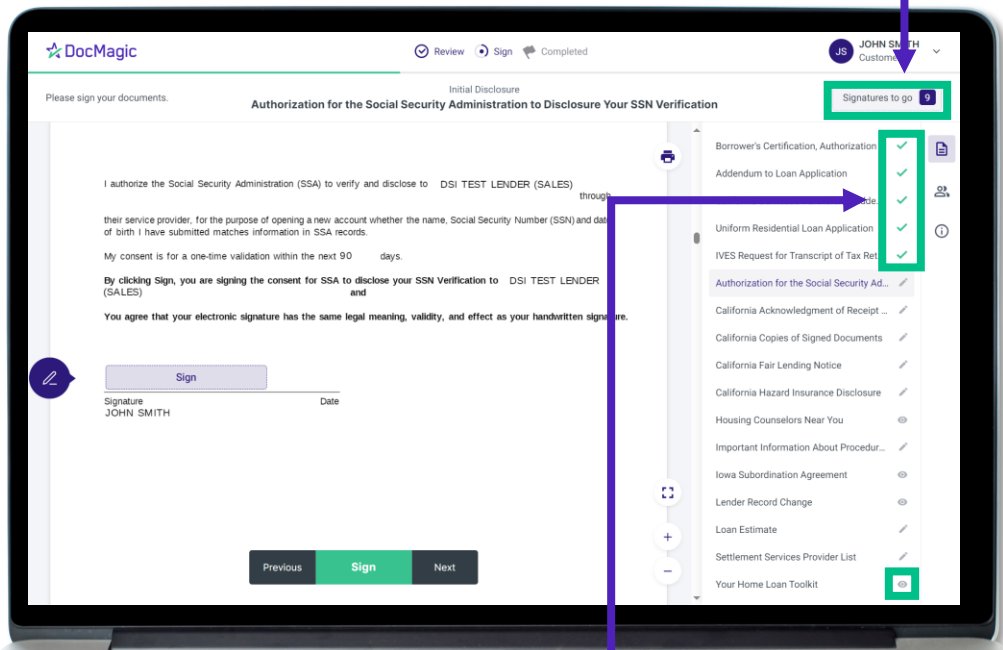
You might be required to click a check box before signing certain documents. In these circumstances, you cannot proceed unless the box is checked.



# eSign for Borrower – Initial Disclosures

## Keeping Track of Progress

The countdown feature shows how many signatures remain.



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

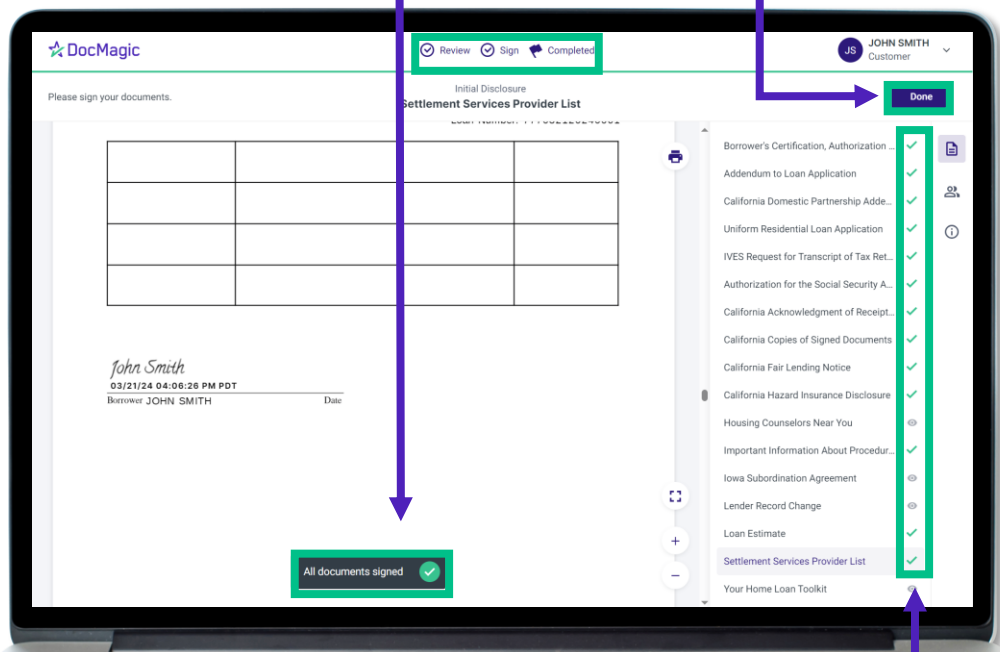
An eyeball indicates that this document does not require a signature.



# eSign for Borrower – Initial Disclosures

When Complete

These icons will indicate when the process is complete.



All applicable checkmarks will be green.



# eSign for Borrower – Initial Disclosures

## When Complete

After you click Done on the previous screen, you may download the completed set of documents.

