



## How To Use Electronic Delivery for Initial CD's

Effective immediately, FSB will allow the delivery of the Initial CD through our e-sign service (Doc Magic). To use this service, the Loan Officer must have an active account through our Doc Magic service. If this is needed, please sign up for this by sending in the "E-Sign Disclosure Set Up Request Form" to [mtgsupportcenter@flanagansatebank.com](mailto:mtgsupportcenter@flanagansatebank.com).

To send the Initial CD using Doc Magic E-sign delivery, please follow these steps after you have saved the Initial CD to your desktop:

### Step 1

Sign in to Doc Magic and click on e-Sign Console.

to new responsibilities, the management of accounts on many platforms is a big job.

**DocMagic Account Administration** enables authorized Administrators to create new User and Administrator accounts, edit existing users and permissions and configure default account settings.

**Welcome Toni! (#208700)** 

-  **User Account**  
Manage your user account information.
-  **SmartCLOSE**  
Collaborate with settlement providers to exchange and update disclosure data.
-  **eSign Console**  
Dashboard for status and management of eSign events.
-  **Recently Processed Worksheets**  
Quickly access documents created during the last six months.
-  **Report Manager**  
Generate 1098, Closing, HMDA, LEF reports and more.

**My Account**

- User Account
- Sample Review
- eSign Console**
- Recent Worksheets
- Report Manager

**DocMagic**

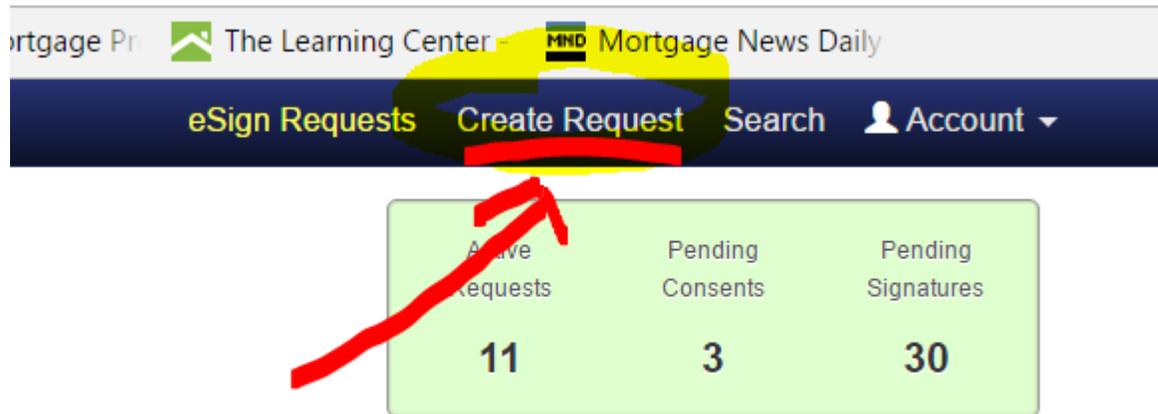
- Why DocMagic?
- DocMagic eForms
- Document Delivery
- Audit System
- Product Training
- User Agreement
- LoanMagic

**Compliance Edge**

- Partners
- About Us

### Step 2

At the top, right of the screen click on Create Request



### Step 3

Complete the request by adding email addresses for all borrowers. You must enter the First and Last Name also as the system needs these for the e-signature part. Click on the + sign to add as needed.

Click on the yellow folder to the upload the Initial CD that you have saved on your desktop.

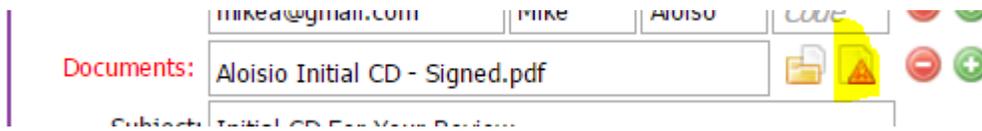
The screenshot shows a form for creating a request. The form includes the following fields and elements:

- From (You):** tonipierce@flanaganstate | Toni | Pierce |  Signer
- To (Signers):** sasicat@gmail.com | Antonia | Pierce | Code | - | +
- Fields:** Email Address, First, Last, Code | - | +
- Documents:** | | - | +
- Subject:** Optional
- Message:** Optional
- I have read and agree to the [Terms of Use](#).
- Buttons:** Send, Save, Clear

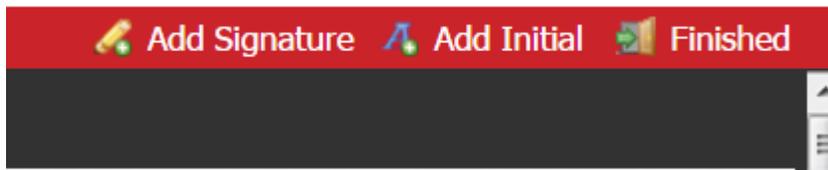
A red arrow points to the '+' button next to the first signer, and a yellow circle highlights the folder icon in the Documents section.

## Step 4

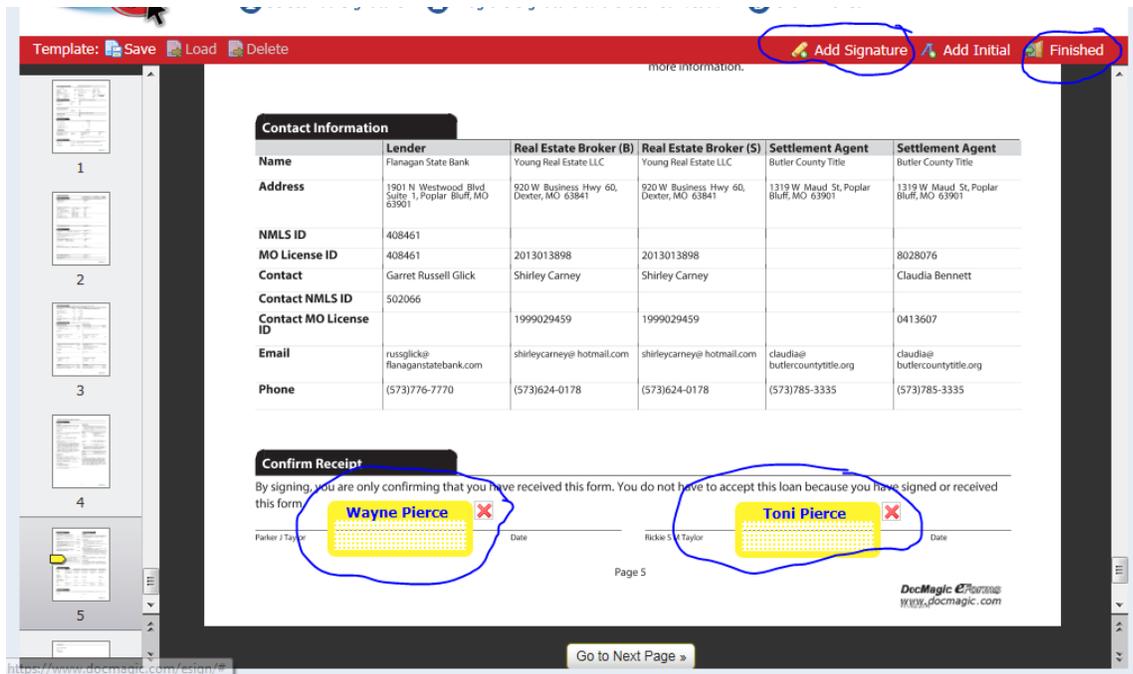
Customize the document for a signature. Open the document by clicking on the paper with a RED triangle



The adding an Electronic Signature to your document screen will come up. Scroll to the page you need to add a signature box to and then click on ADD Signature:



Add your signature box on the signature line for each borrower. Please do not cover up any of the words that are on the document when adding the signature line for the borrower(s). If there are multiple signers you will need to add a signature box for each of them. Then click Finished.



## Step 5

Add a Subject Line.

Add a customized message to the borrower(s).

From (You):	tonipierce@flanaganstate	Toni	Pierce	<input type="checkbox"/> Signer
To (Signers):	sasicat@gmail.com	Antonia	Pierce	Code  
	mikea@gmail.com	Mike	Aloiso	Code  
Documents:	Aloisio Initial CD - Signed.pdf  			 
Subject:	Initial CD For Your Review			
Message:	Mike and Amy, Thank you for your patience as we complete the final step for your loan.			
<input checked="" type="checkbox"/> I have read and agree to the <a href="#">Terms of Use</a> .				
<input type="button" value="Send"/> <input type="button" value="Save"/> <input type="button" value="Clear"/>				

## Step 6

Click send. The borrower(s) will receive an email. AND, you must enter a different email address for each borrower.

They will be directed by the system to follow a link to view the document and certify their receipt of the information.

 Reply  Reply All  Forward

Wed 12/28/2016 2:57 PM



docs@docmagic.com

Initial CD

To: Toni Pierce

 [Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Good afternoon Wayne and Toni. I have attached the initial CD for your review. Please review and sign this document. Feel free to contact me with any questions.

[Click here](#) to consent and access your electronic documents.

Clicking on the link will open the document and they must view each page of the document to certify they have reviewed. At the end, they will click to sign and the system will notify them they have completed the task. In addition, the borrower will receive a thank you email from Doc Magic confirming their signed document.

Reply Reply All Forward  
Wed 12/28/2016 3:40 PM  
docs@docmagic.com  
eSign Disclosure and Consent

To Toni Pierce  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

PDF eSign\_Disclosure\_and\_...  
69 KB

Action Items + Get more add-ins

Toni,

**Thank you for providing your consent to access/acknowledge your document(s) in an electronic format.**

We have attached a copy of your eSign Disclosure and Consent to this email for your reference. Please retain a copy of it for your records as it contains important information regarding your rights.

If you have any questions regarding your consent, [click here](#) to visit our online support system.

### Step 7

The Loan Officer will get a confirmation email when all parties have completed the process. They will then go into the E-Console to retrieve the POD (Proof of delivery) for the Initial CD to send to Closing Department.

Custom_Request Standard Documents	Toni Pierce tonipierce@flanaganstatebank.com	Signed Test	1 12/20/16 8:25 AM				
--------------------------------------	---	----------------	--------------------------	--	--	--	--

The status will show as Signed and the LO will click on the PDF symbol to the right. This will provide the signed document and the e-sign certificate that our compliance will require to show it meets E-sign delivery requirements.

**Confirm Receipt**

By signing, you are only confirming that you have received this form. You do not have to accept this loan because you have signed or received this form.

Benjamin Lawrence 12/28/16 01:40:44 PM PST	12/28/16 12:58:37 PM PST
Date	Date



## DocMagic eSign Certificate

<b>eSign Id:</b>	23605465	<b>Reference Id:</b>	Initial CD	<b>From:</b>	WAYNE PIERCE	<b>Status:</b>	Signed
<b>Documents Type:</b>	CUSTOM REQUEST	<b>Loan Id:</b>	Custom_Request	<b>Documents:</b>	1	<b>Signatures:</b>	Y

### List of Signers

Name/Email	Signature	Created Date	Started Date	Consented Date	Viewed Date	Completed Date
TONI PIERCE tonipierce@flanagansstatebank.com		12/28/16 12:55:12 PM	12/28/16 01:40:13 PM	12/28/16 01:40:18 PM	12/28/16 01:40:31 PM	12/28/16 01:40:45 PM
WAYNE PIERCE waynepierce@flanagansstatebank.com		12/28/16 12:55:12 PM	12/28/16 12:57:40 PM	12/28/16 12:57:45 PM	12/28/16 12:57:53 PM	12/28/16 12:58:37 PM

### Audit Log

Date/Time	Person	IP Address	Action
12/28/16 12:55:12 PM	SYSTEM USER	50.122.66.62	eSign event created
12/28/16 12:56:39 PM	TONI PIERCE	50.122.66.62	Invitation sent to tonipierce@flanagansstatebank.com
12/28/16 12:56:40 PM	WAYNE PIERCE	50.122.66.62	Invitation sent to waynepierce@flanagansstatebank.com
12/28/16 12:57:45 PM	WAYNE PIERCE	50.122.66.62	Consented to DocMagic eSign
12/28/16 12:57:53 PM	WAYNE PIERCE	50.122.66.62	Approved electronic representation of signature - "Wayne Pierce"
12/28/16 12:57:53 PM	WAYNE PIERCE	50.122.66.62	Disclosure version 1 prepared on December 28, 2016, 12:55 pm PST displayed
12/28/16 12:58:37 PM	WAYNE PIERCE	50.122.66.62	eSign event signing complete
12/28/16 01:40:18 PM	TONI PIERCE	50.122.66.62	Consented to DocMagic eSign
12/28/16 01:40:31 PM	TONI PIERCE	50.122.66.62	Approved electronic representation of signature - "Toni Pierce"
12/28/16 01:40:31 PM	TONI PIERCE	50.122.66.62	Disclosure version 1 prepared on December 28, 2016, 12:55 pm PST displayed
12/28/16 01:40:45 PM	TONI PIERCE	50.122.66.62	eSign event signing complete
12/28/16 01:40:46 PM	SYSTEM USER	50.122.66.62	eSign event completed

### List of Documents

Document Name	Page(s)	Mark(s)	Signer(s)
---------------	---------	---------	-----------

### Step 8

Send the signed CD and E-Sign Certificate/Summary to [closings@flanagansstatebank.com](mailto:closings@flanagansstatebank.com) as soon as possible to allow FSB to release the closing package to the title company.

If you have any questions about this process, please contact us at [mtgsupportcenter@flanagansstatebank.com](mailto:mtgsupportcenter@flanagansstatebank.com).