



Mobile Closings Quick Reference

Without eNotary (Wet Sign Only)

➤ STEPS TO COMPLETE BEFORE MOBILE CLOSING

- Verify the hardware you are working with meets [minimum system requirements](#).
- You must have working mobile Wi-Fi or Hot Spot accessibility. If you anticipate an issue with internet connectivity, contact the Title Office/Closing Agent for an alternate closing method.
- Sign in at <https://portaltraining.pavaso.com> and verify the order you are closing is in **Pending Closing** status. If not in **Pending Closing** status, contact Pavaso Support.

➤ STEPS TO COMPLETE DURING MOBILE CLOSING

1. Log into Pavaso

- Login <https://portaltraining.pavaso.com> using the information provided in the instruction email.
- Open **Digital Close Enterprise** and Enter your **6 Digit PIN**

2. Open Order in Lobby

- Search for your file by Test Number
- Select the order with the Order Number and Loan Number that matches the Test Number assigned.
- ***If you are unable to find your test number please contact Pavaso Support***

3. Select Web Closing and Click “Continue”

- Click on **BUYER (Conduct Closing with Buyer(s), Notary, and other parties)** and **Continue**

4. Borrower(s) confirm their presence

- Borrower(s) enter **6 Digit PIN**

5. Draw and Save Signatures

- Select **Edit** on far right of page and sign using finger, stylus, or mouse
- Borrower(s) must sign **EXACTLY** as displayed in upper left corner to match loan documents (*Example: If the borrower has a middle name or initial they must include on their digital signature*)
- Click **Adopt** to save. (**NOTE: The Closing Agent Signature is NOT required at Mobile Close**)

6. Click “Start Closing”

- Informational Task List shows actions needed to complete; Click **“Start Closing”**

7. Select Orange documents

- Under **List of Docs** choose **Incomplete** from the drop down
- Click on first document in list

8. Complete Remaining Digital Tasks

- Find the area on document that requires action (*Example: incomplete borrower signatures, blank text boxes, etc.*)
- For Buyer, click to apply **Buyer signature; Save**

9. Buyer Complete

- **Buyer Complete** button at top left will become **Blue/Live** when all actions are complete
 - Click **Buyer Complete** when applicable
-

10. Import Later

- Popup will remind you to have wet ink sign documents signed and to Import documents.
- **DO NOT IMPORT DOCUMENTS** - the Title Office/Closing Agent imports documents, click “**Import Later**”

11. Return Wet Ink Signed Documents as soon as possible per Title Office/Closing Agent specific rules

- Funding Review cannot start until Title Office/Closing has received the wet signed documents

12. Pavaso Support

Business Hours: Monday – Friday 7:00 am – 8:00 pm CST

Phone/Closing Hotline: (866) 288-7051, Option 3 24/7

Email: support@pavaso.com

Online Help: Log into your Pavaso account and click on “Help”