

Document Tag Functions

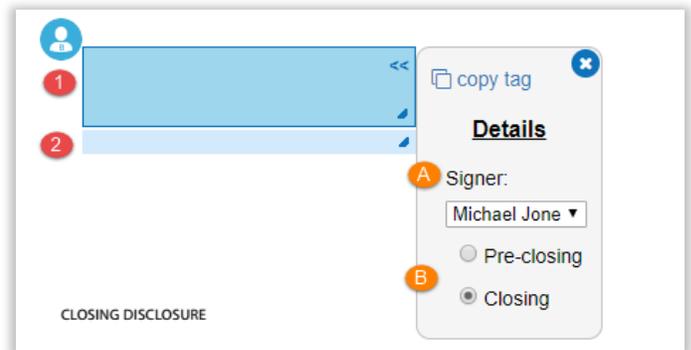


Note: Tags are all independent from each other and can be moved to different areas of the document. The double arrows inside of a tag will hide or display its "Details" box.

Tag for Signature

The "Tag for Signature" button creates a (1) signature and (2) date tag, with a "Details" box, for any party/person that is set on the Order.

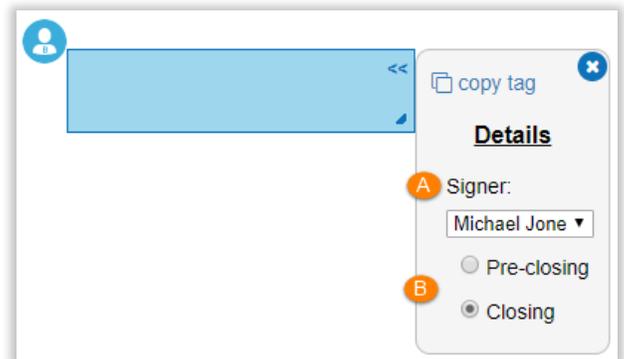
- A. **Signer:** Select who needs to sign.
- B. **Pre-Closing or Closing:** Select what phase the tag will need to be signed in. (This should default to Closing.) If signing will be done during closing, then leave at Closing. If signing will be done at home during the Borrower Accept and Save process, select Pre-Closing.



Tag for Initials

The "Tag for Initials" button creates an initials tag, with a "Details" box, for any party/person that is set on the Order.

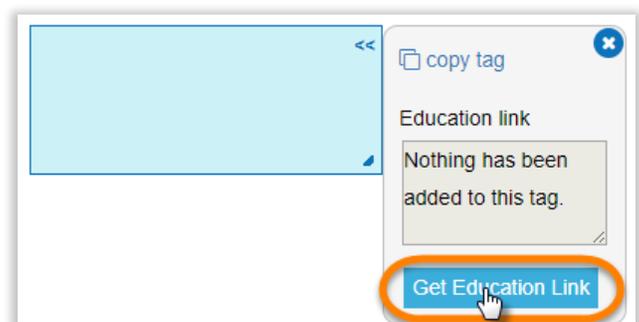
- A. **Audience:** Select who the initials belong to.
- B. **Pre-Closing or Closing:** Select what phase the tag will need to be signed in. (This should default to Closing.) If signing will be done during closing, then leave at Closing. If signing can be done before closing, select Pre-Closing.



Tag for Education

The "Tag for Education" button creates a box tag in which to place a link to educational content that informs and educates the Borrower about everything he or she is signing.

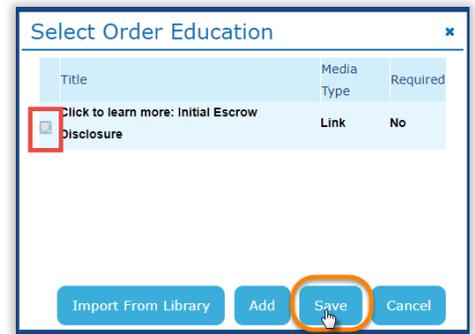
1. Click on the "Get Education Link" button and choose one of the following options:



Option 1: Recently Used

The “Select Order Education” pop-up will display a list of recently used educational content.

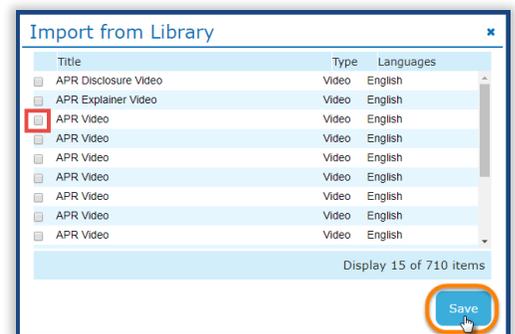
1. Check the item needed and “Save.”



Option 2: Import from Library

The “Import from Library” button allows you to search for educational content in your Educational Library that has not been recently used.

1. Click on the “Import from Library” button.
2. In the “Import from Library” pop-up, you can search, check the item needed, and click on the “Save” button to import the item to the recently used list.
3. Check the item imported and “Save” to insert a link to this item in the tag.

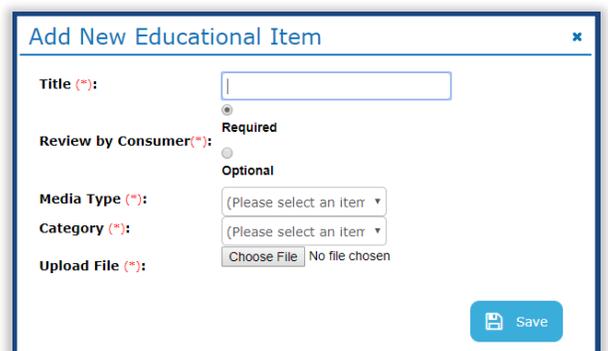


Option 3: Add a New Educational Item

The “Add” button is a shortcut that allows you to upload a new educational content (not already in the Educational Library), on the spot, without having to go to the Educational Library.

1. Click on the “Add” button.
2. In the “Add New Educational Item” pop-up, fill in the following details and “Save:”

- **Title**
- **Review by Consumer:** Choose whether the Borrower(s) is required to review the content during the Review and Accept process.
 - **Required**
 - **Optional**
- **Media Type:** Video, Audio, Text, Picture, or Link
- **Category:** Closing Checklist, Ask CFPB Questions, Annotated Forms, Other
- **Upload File:** Click on the “Choose File” button to browse and open the new material.

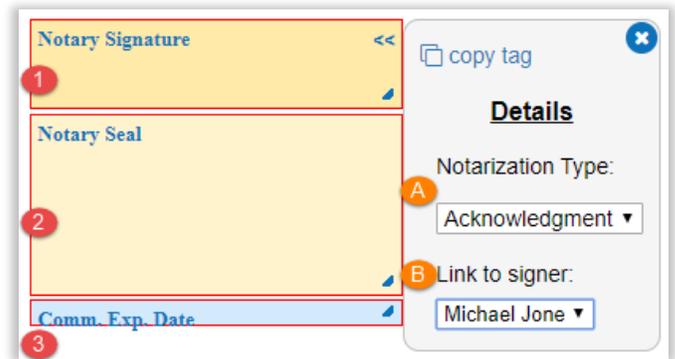


3. The new material will now show up in the Select Order Education pop-up. Check it again and “Save” to insert a link to this material in the tag.

Tag for Notary

The “Tag for Notary” button creates an (1) eNotary signature, (2) eNotary seal, and (3) Commission expiration date tags with a “Details” box.

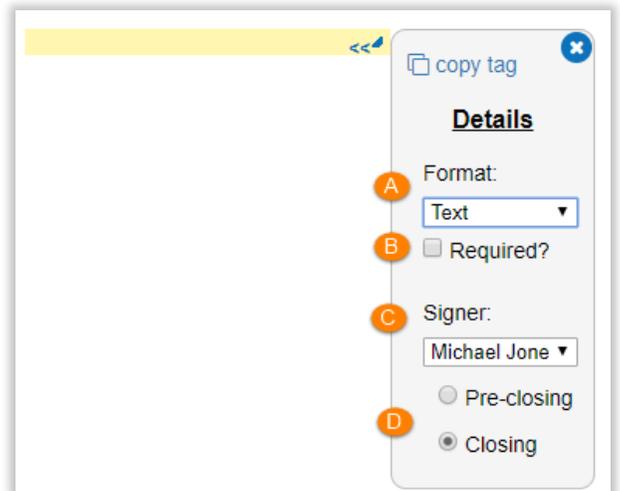
- A. **Notarization Type:** Select what type of notarization it is.
- B. **Link to Signer:** Select who the notarization is for.



Tag for Text

The “Tag for Text” button creates a multifunctional tag with a “Details” box. You can choose to make it a text tag, date field, or a checkbox on a document.

- A. **Format:** Text, date, or checkbox.
- B. **Required:** Check if tag must be filled out.
- C. **Signer:** Who needs to fill out the tag
- D. **Pre-Closing or Closing:** Select what phase the tag will need to be signed in. (This should default to Closing.) If signing will be done during closing, then leave at Closing. If signing can be done before closing, select Pre-Closing.



Contact Pavaso

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