



Importance of Pre-Closing Document Review Completion

Note: This document refers to a **consumer**. For the purpose of this document, please note that consumer includes borrowers, buyers, title holders, non-purchasing spouse, and sellers, when applicable.

Document(s) Reviewed and Confirmed

Once a document is reviewed and confirmed by all consumers, a black check mark will display in their respective boxes next to the document under **Accepted**.

During closing, the consumer’s signature will automatically apply on all documents that they have previously confirmed, if the **Approve All, Sign Once** option is enabled within the company’s configuration settings.

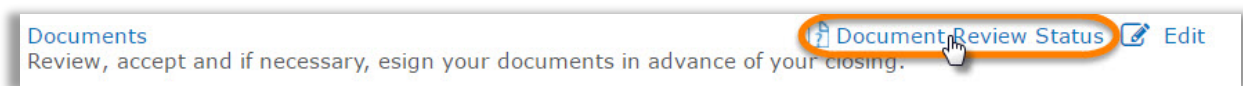
	Reviewed	Accepted	Date Due
Title Documents			
Loan Documents			
MULTISTATE FIXED RATE NOTE - SECOND LIEN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05/15/2017
MASSACHUSETTS SECOND MORTGAGE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05/15/2017
CONDOMINIUM RIDER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05/15/2017
SOCIAL SECURITY ADMINISTRATION AUTHORIZA...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05/15/2017

Document(s) Reviewed, but not Confirmed

If a document is reviewed only, the box in the **Reviewed** column will display a black check mark and the **Accepted** column will remain empty. Any document that is reviewed but not confirmed by a consumer must be signed by them individually during closing.

	Reviewed	Accepted	Date Due
4506t	<input checked="" type="checkbox"/>	<input type="checkbox"/>	05/24/2017
CLOSING DISCLOSURE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	05/24/2017
CLOSING INSTRUCTIONS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	05/24/2017
FHA Endorsement - Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	05/24/2017

Note: Orange check marks indicate that at least one consumer has reviewed and/or confirmed a document. Select the **Document Review Status** link to view each user’s document review status.



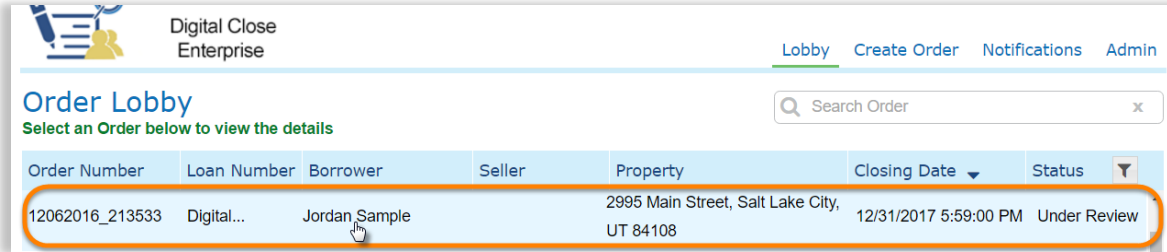


Document Review Status

There are three ways you can verify which documents consumers have reviewed and confirmed.

Option One: Overview

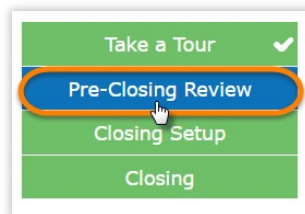
From the **Order Lobby**, select an order to open it.



Once inside the order, you will see a list of documents and an overview of which have been reviewed and/or confirmed. A black check mark indicates that all consumers have reviewed and confirmed the document. An orange check mark indicates that at least one consumer has reviewed and confirmed the document, but one or more parties has yet to do so.

	Reviewed	Accepted	Date Due
Title Documents			
Loan Documents			
NEW HAMPSHIRE FIXED RATE NOTE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/10/2017
NEW HAMPSHIRE MORTGAGE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/10/2017
MULTISTATE CONDOMINIUM RIDER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/10/2017
SOCIAL SECURITY ADMINISTRATION AUTHORIZA...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/10/2017
SOCIAL SECURITY ADMINISTRATION AUTHORIZA...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/10/2017
COMPLIANCE AGREEMENT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/10/2017
4506T - REQUEST FOR TRANSCRIPT OF TAX RE...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/10/2017
UNIFORM RESIDENTIAL LOAN APPLICATION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/10/2017
EVIDENCE OF JOINT APPLICATION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/10/2017

Note: If you do not see the overview, make sure you are in the Pre-Closing Review Phase.

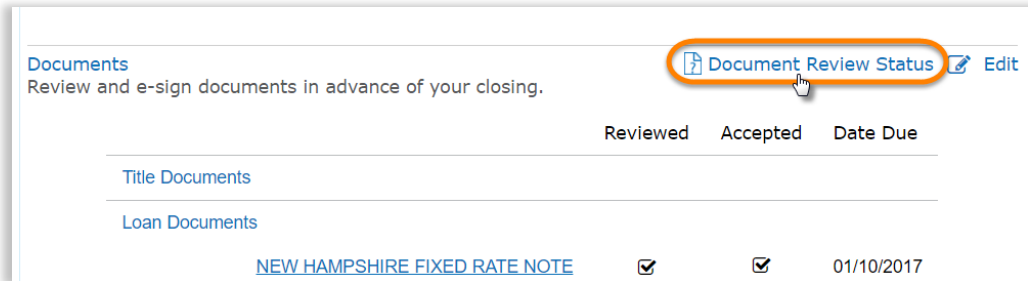




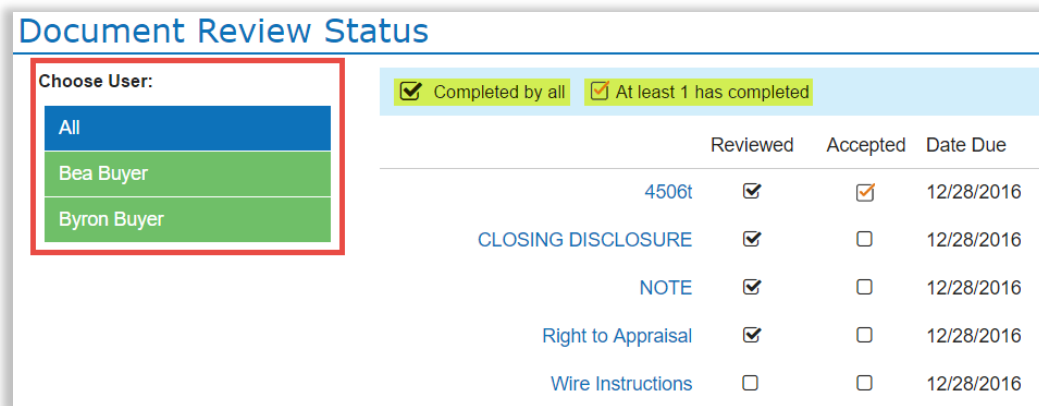
Option Two: Document Review Status Link

From within the **Pre-Closing Review** Phase, select the **Document Review Status** link.

Note: This link can also be found under *Closing Setup*.



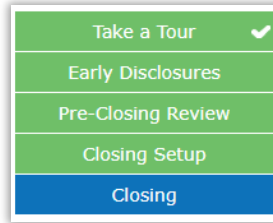
A pop-up box will appear. You can select a consumer's name to verify which documents they have reviewed and/or confirmed. A black check mark indicates that all consumers have reviewed and/or confirmed a document. An orange check mark indicates that at least one consumer has reviewed and/or confirmed the document, but one or more parties has yet to do so.





Option Three: Closing Phase

1. Navigate to the **Closing** phase on the left-hand menu.



2. The **Closing** tab will display the following information:
 - A. **Document Review Status** – View the status of each consumer’s document review and confirmation.
 - B. **Click here for tips** – Get tips for troubleshooting common scenarios.
 - C. **Created Account** – A black check mark signifies that a user has created an account.
 - D. **Started Review** – A black check mark appears when a consumer initiates the review process.
 - E. **Ready to Close** – A black check mark appears once all consumers have completed their review and they are ready for closing using Pavaso.
 - F. **Resend Invitation** – If a consumer needs an invitation to Pavaso to be resent, this link will send an invitation to the email address that was provided. If the consumer has previously created a Pavaso account, this link will not appear.

This order is still in the Pre-Closing phase. Your Closing will not be available to start until the Configuration and Pre-Closing Review have been completed.

Consumer Status

A [Document Review Status](#) - Click here to see each document and review status.
B Order not ready to close? [Click here for tips.](#)

		C Created account	D Started Review	E Ready to close
Buyer				
Example Signer	F Resend Invitation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-Consumers				
		Created account	Action(s) Required	Action(s) Completed
Lauren Lender		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cindy Closer		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



Pavaso Support

Business Hours: Monday – Saturday 7:00 AM – 8:00 PM CST

Email: support@pavaso.com

Phone/ Closing Hotline: (866) 288-7051, option 3

24/7 Online Help Library: Log in to your Pavaso account and select **Help** next to your name.

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