

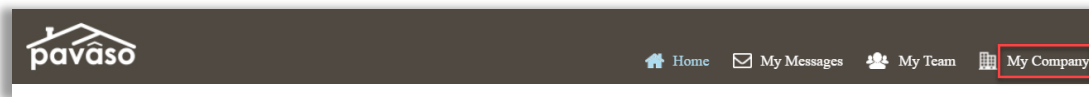


The **Push to Pending Closing** feature will allow the assigned company users and permissible collaborators on a transaction to move an order to the Pending Closing status, if Signer(s) have not created their account, PIN, or completed their **Pre-Closing Review**, allowing the signing to start faster.

Enabling the Push to Pending Closing Option

To permit the **Push to Pending Closing** feature to be available, a Company Administrator needs to enable the setting for their Company, following the steps below:

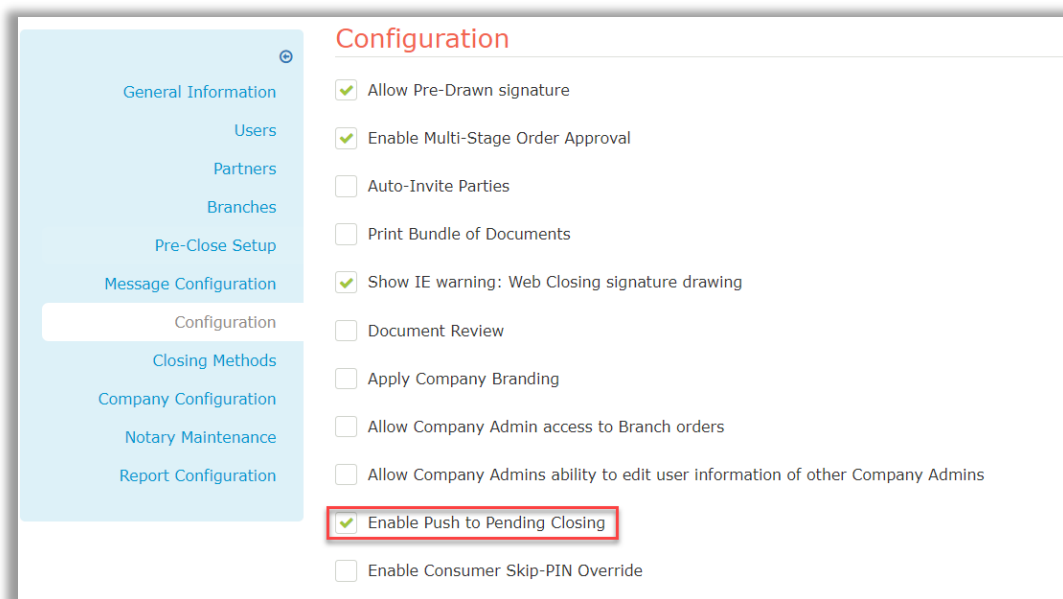
1. Log in to their account and select **My Company**.



2. Select **Edit** for the company.

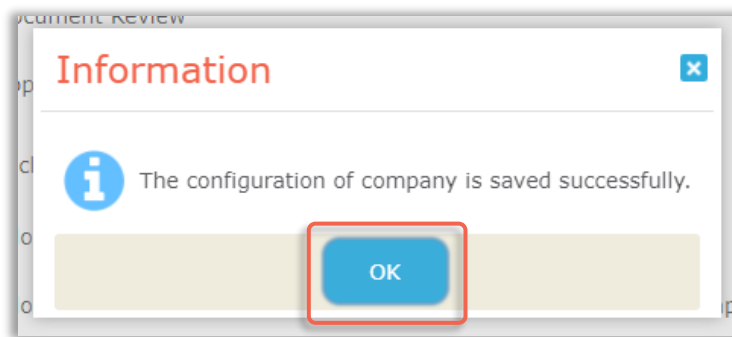
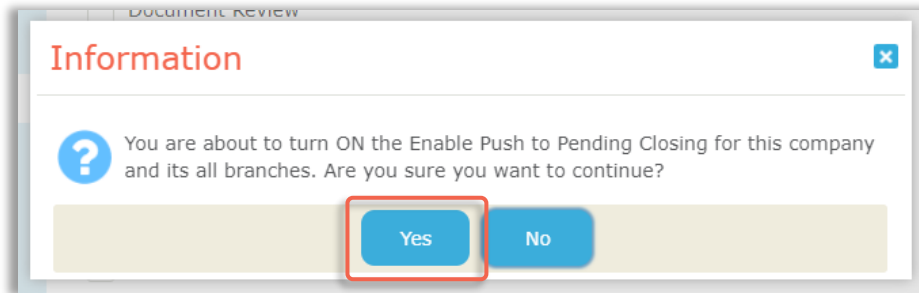


3. Select **Configuration** and **Enable Push to Pending Closing**. Verify the selection in the next pop-up and select **OK** in the confirmation pop-up.





Push to Pending Closing



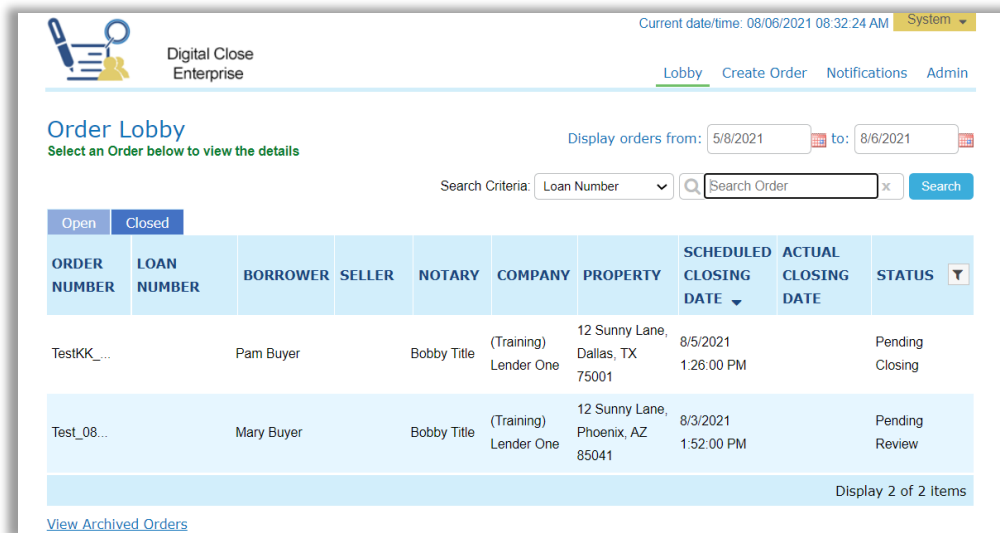
Important Note: If a parent company enables this option, it will be turned on for all their branches. This setting can be disabled for individual branches by unchecking the checkbox next to the setting. Additionally, if you are a Title Company or Real Estate Attorney collaborating with a Lender on an Order they created, the Lender needs to have the setting enabled for their company, to be able to utilize the feature.



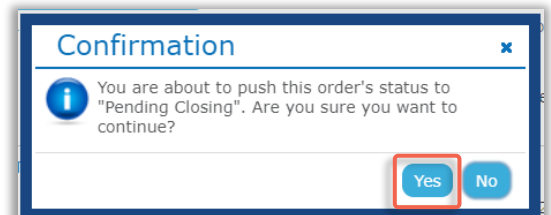
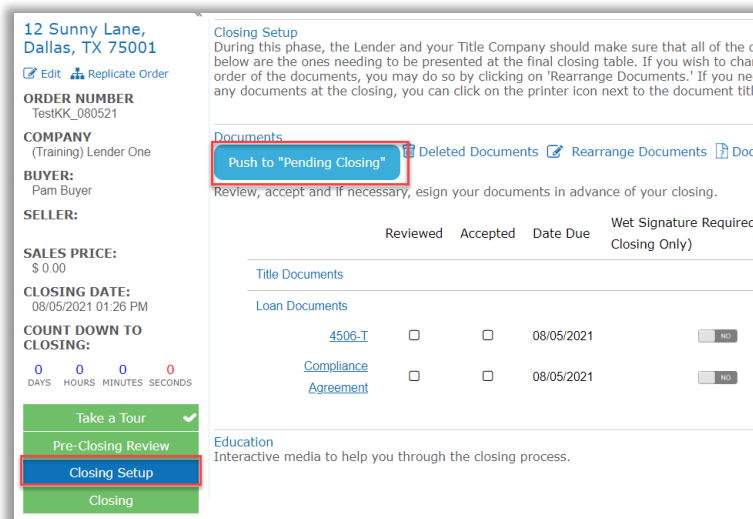
Utilizing the Push to Pending Closing Option During Hybrid & Fully Digital In-Person Notary (IPEN)* Signings

To take advantage of the **Push to Pending Closing** feature during an IPEN signing, follow the steps below:

1. The Closing Agent will select the order from their **Order Lobby**.

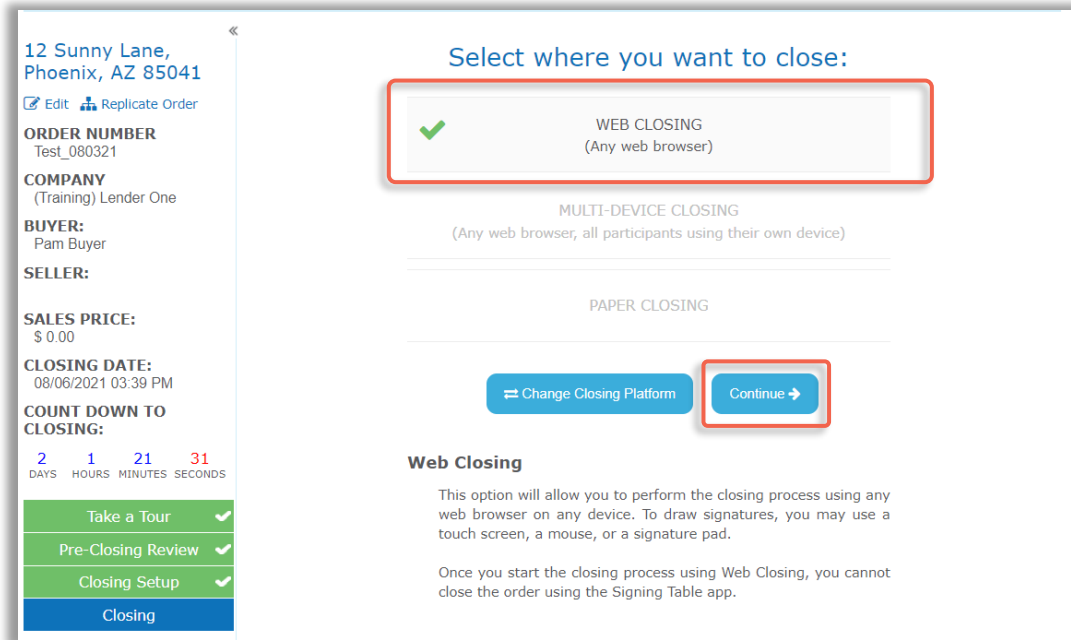


2. Select **Closing Setup** from the bottom left corner and then **Push to "Pending Closing"**. After verifying the action in the next pop-up, the Closing Agent will be able to start the signing session.



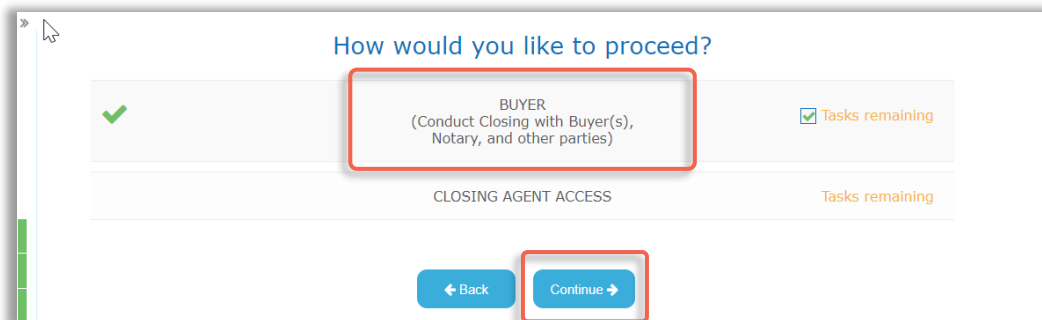
Important Note: The **Push to "Pending Closing"** button is available after the Signers have been invited into the Order.

3. The Closing Agent will select the **Web Closing** option and then **Continue**.

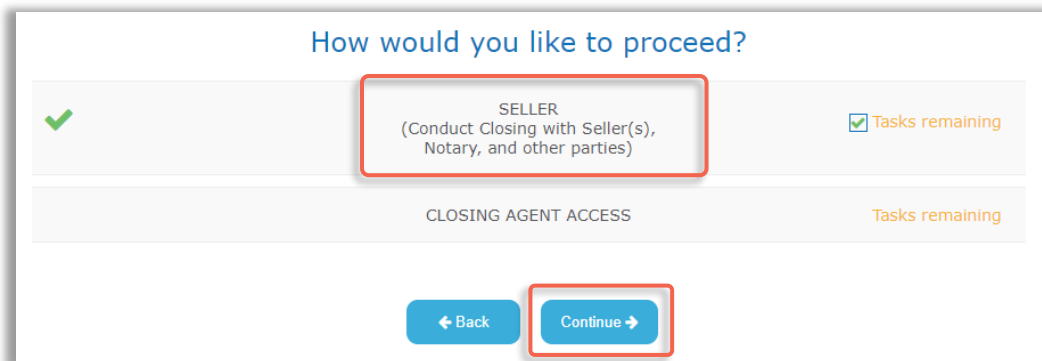


The screenshot shows a web interface for selecting a closing method. On the left is a sidebar with order details: 12 Sunny Lane, Phoenix, AZ 85041; Order Number Test_080321; Company (Training) Lender One; Buyer Pam Buyer; Seller; Sales Price \$ 0.00; Closing Date 08/06/2021 03:39 PM; and a countdown timer for closing. The main area is titled "Select where you want to close:" and lists three options: "WEB CLOSING (Any web browser)", "MULTI-DEVICE CLOSING (Any web browser, all participants using their own device)", and "PAPER CLOSING". The "WEB CLOSING" option is selected with a green checkmark and is highlighted with a red box. Below the options are two buttons: "Change Closing Platform" and "Continue →", with the "Continue" button highlighted by a red box. Below the buttons, the "Web Closing" section is expanded, showing a description: "This option will allow you to perform the closing process using any web browser on any device. To draw signatures, you may use a touch screen, a mouse, or a signature pad." and a note: "Once you start the closing process using Web Closing, you cannot close the order using the Signing Table app."

4. Select **Buyer** or **Seller** and then **Continue** to proceed.

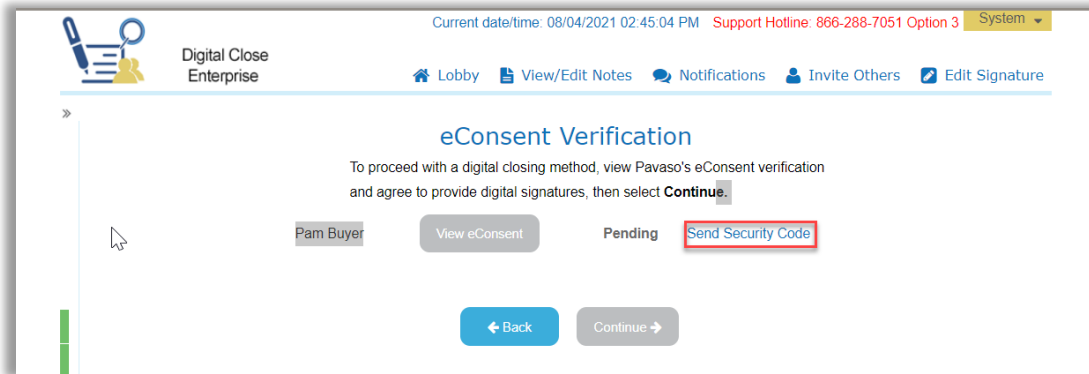


The screenshot shows the "How would you like to proceed?" screen with the "BUYER" option selected. The "BUYER" option is highlighted with a red box and includes the text "(Conduct Closing with Buyer(s), Notary, and other parties)" and a "Tasks remaining" indicator with a green checkmark. Below it is the "CLOSING AGENT ACCESS" option with a "Tasks remaining" indicator. At the bottom are "Back" and "Continue →" buttons, with the "Continue" button highlighted by a red box.

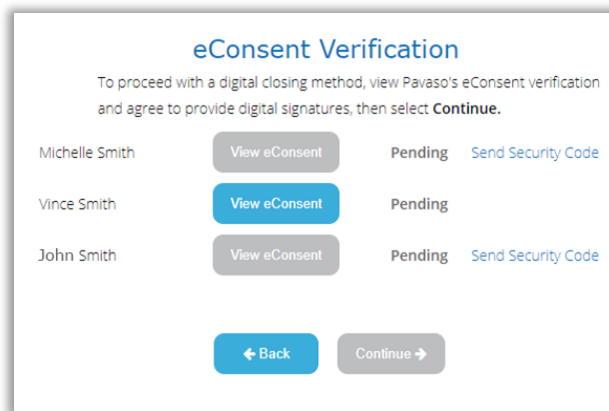


The screenshot shows the "How would you like to proceed?" screen with the "SELLER" option selected. The "SELLER" option is highlighted with a red box and includes the text "(Conduct Closing with Seller(s), Notary, and other parties)" and a "Tasks remaining" indicator with a green checkmark. Below it is the "CLOSING AGENT ACCESS" option with a "Tasks remaining" indicator. At the bottom are "Back" and "Continue →" buttons, with the "Continue" button highlighted by a red box.

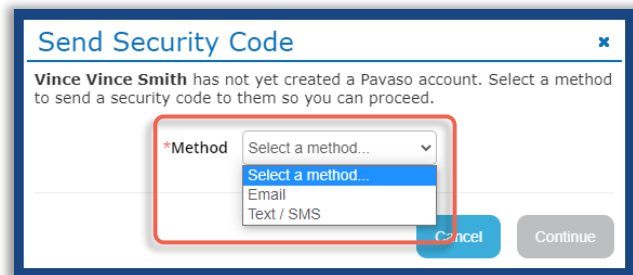
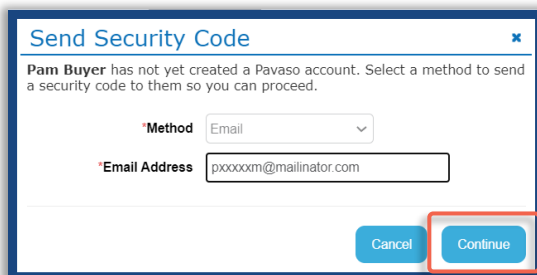
- To request a security code to be sent to a Signer, select **Send Security Code**. This security code will be used in place of a Signer's PIN, to verify their presence at the closing.



Important Note: Signers that have created their account and numeric PIN must use their PIN to verify their presence at the closing. If a Signer has forgotten their PIN, they can follow the steps in [this guide](#) to reset it.

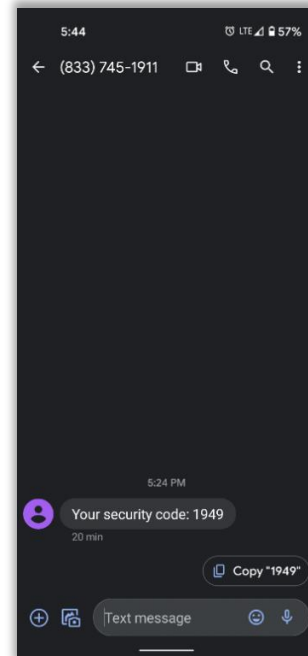


- Select the method to send the security code and then **Continue**. If a Signer has both an email address and a phone number documented in the **Order Details**, you will have the option to use either their email or phone number to deliver the security code to them.

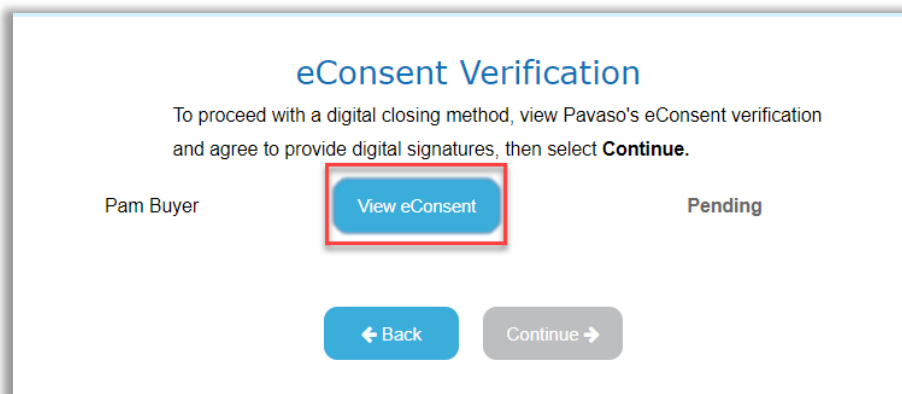




- Depending on the receipt method selected, the Signer will receive an email or a text message with the security code.



- Select **View eConsent** on the Pavaso platform. Have the Signer enter the security code and select **I agree** to accept the Uniform Electronic Transactions Act (UETA) disclosure, referred to as **eConsent** in the system.





Consent for use of Electronic Signatures and Audio-Video Records:

Pavaso is required by law to provide you with certain disclosures regarding documents and information involved in your real estate transaction, which includes the vital documentation necessary to consummate your financing for the transaction (collectively, "Required Information"). With your consent, Pavaso can deliver Required Information to you by: displaying or delivering the Required Information electronically; and requesting that you print or download the Required Information and retain it for your records.

This notice contains important information that you are entitled to receive before you consent to electronic delivery of Required Information. Your consent also permits the general use of electronic records, electronic signatures, identification verification, audio-video recording, and transmitting, sharing, and storing information in connection with your real estate transaction and/or financing application. Please read this notice carefully and print or download a copy for your files.

After you have read this information, if you agree to receive Required Information from Pavaso electronically, and if you agree to the general use of technology-based identification verification, audio-video recording, electronic records, and/or electronic signatures in connection with your relationship with Pavaso, please click on the "I agree" button where indicated.

Statement of Electronic Disclosures:

*Enter your Security Code [Send new code](#)

If you choose to opt out, you will not be allowed to digitally sign the documents.

[← I Disagree](#) [I Agree →](#)

9. The status for the acknowledgement of the **eConsent** will change to **Agreed** and the Closing Agent can choose **Continue** to proceed.

eConsent Verification

To proceed with a digital closing method, view Pavaso's eConsent verification and agree to provide digital signatures, then select **Continue**.

Pam Buyer [View eConsent](#) **Agreed**

[← Back](#) [Continue →](#)



10. In case a Signer needs to enter their PIN a second time, they can use the security code again in the field below. If needed, a new security code can be requested by selecting **Send New Code**.

Important Note: The security code expires after 30 minutes

The screenshot shows a web form titled "Individuals present during signing must enter their PIN". Below the title is a sub-header: "Individuals who are here at signing must enter their PIN to confirm that they are present. If an individual is not here, leave the field blank." The form contains a row with the name "Pam Buyer (pam@mailinator.com)", a text input field labeled "Enter Security Code", and a "Send new code" button. Below this row are two buttons: "Back" and "Continue".

After selecting **Continue**, the Signer and Closing Agent will be able to proceed with the standard signing process.

If a security code has expired, an error message will appear under each expired security code field and a new security code can be requested by selecting **Send new code**.

The screenshot shows the same web form as above, but with three rows of signers. The first row is "Vince Smith (vincsmith@mailinator.com)" with a security code field containing "*****". The second row is "Vince Vince Smith (vincsmith@mailinator.com)" with a security code field containing "****" and a "Send new code" button. Below the second row's security code field is a red error message: "The Security Code is Expired.". The third row is "Michelle Smith (michellesmith@mailinator.com)" with a security code field containing "****" and a "Send new code" button. Below the third row's security code field is another red error message: "The Security Code is Expired.".



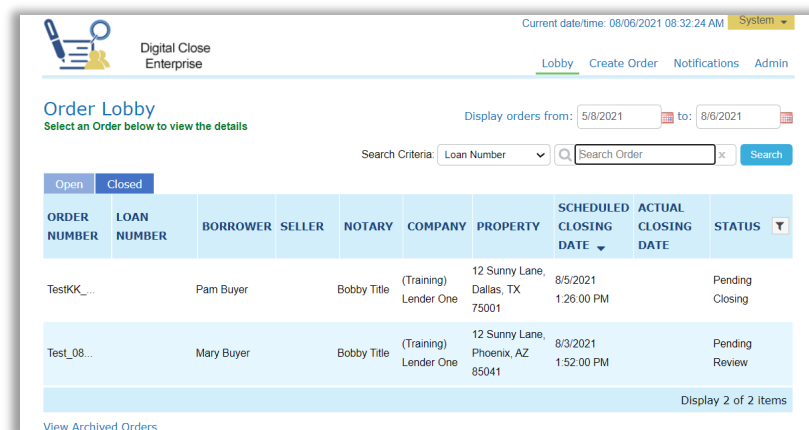
Utilizing the Push to Pending Closing Option During Remote Online Notary (RON)*, Remote Ink-Signed Notary (RIN)** & In-Person Contact-Free Signings

For RON, RIN and in-person contact-free signings, all participants use their own device(s) to participate in the signing and the Signers must create their account and PIN. However, they do not need to complete the **Pre-Closing Review** to join the signing session. For Signers to be able to join the signing session remotely or in-person from their own device, the Closing Agent, using their preferred communication method, will instruct the Signers to create their account and PIN before using the **Push to Pending Closing** feature.

You can see the steps on how to create an account on Pavaso as a Signer in [this guide](#) and how to resend an invitation to a Signer in [this guide](#).

To take advantage of the **Push to Pending Closing** feature during a RON, RIN, or in-person contact-free signing, follow the steps below:

1. The Closing Agent will select the order from their **Order Lobby**.



2. Select **Closing Setup** from the bottom left corner and then **Push to "Pending Closing"**. This will allow the Closing Agent to begin the signing session.



Push to Pending Closing

12 Sunny Lane,
Dallas, TX 75001

ORDER NUMBER
TestKK_080521

COMPANY
(Training) Lender One

BUYER:
Pam Buyer

SELLER:

SALES PRICE:
\$ 0.00

CLOSING DATE:
08/05/2021 01:26 PM

COUNT DOWN TO CLOSING:
0 DAYS 0 HOURS 0 MINUTES 0 SECONDS

Take a Tour ✓

Pre-Closing Review

Closing Setup

Closing

Closing Setup
During this phase, the Lender and your Title Company should make sure that all of the documents below are the ones needing to be presented at the final closing table. If you wish to change order of the documents, you may do so by clicking on 'Rearrange Documents.' If you need any documents at the closing, you can click on the printer icon next to the document title

Documents
Deleted Documents Rearrange Documents Document

Review, accept and if necessary, esign your documents in advance of your closing.

	Reviewed	Accepted	Date Due	Wet Signature Required (Closing Only)
Title Documents				
Loan Documents				
4506-T	<input type="checkbox"/>	<input type="checkbox"/>	08/05/2021	<input type="checkbox"/>
Compliance Agreement	<input type="checkbox"/>	<input type="checkbox"/>	08/05/2021	<input type="checkbox"/>

Education
Interactive media to help you through the closing process.

Confirmation

You are about to push this order's status to "Pending Closing". Are you sure you want to continue?

Yes No

Important Note: The **Push to "Pending Closing"** button is available in **Closing Setup** after the Signers have been invited into the order.

- The Closing Agent will select the **Remote Online Closing** option for a RON or RIN signing and the Multi-Device Closing option for an in-person contact-free signing, and then select **Continue**.

Select where you want to close:

WEB CLOSING
(Any web browser)

REMOTE ONLINE CLOSING
(Minimum browser requirements: Chrome 72, Firefox 52, Opera 60, Safari 13 for macOS)

MULTI-DEVICE CLOSING
(Any web browser, all participants using their own device)

PAPER CLOSING

Change Closing Platform

Continue →

After selecting **Continue** and all the Signers have created their account and joined the signing session, the Closing Agent will be able to proceed with the standard signing process.



Pavaso Support

Support Hours: <https://pavaso.com/contact/>

Phone/ Closing Hotline: (866) 288-7051

Email: support@pavaso.com

[View Our 24/7 Online Help Library](#)

* Due to platform capabilities, state law or regulation, state executive orders, or all, electronic notarization and remote online notarization are not available in all areas.

** Users should consult their title insurance underwriter, if applicable, laws, regulations, and Executive Orders applicable to each signing session. Users are solely responsible for all steps necessary to ascertain, determine, meet, and verify compliance with all applicable orders, laws, regulations, rules and requirements governing any notarial or other execution of writings facilitated in whole or part through Pavaso's Essential Notary™ or any other Pavaso technology.

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