InstaTag Toolbar

Flexible Tagging for In-Person and Remote Signings

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Pavaso, Inc.

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About the InstaTag Toolbar

When can I use the InstaTag Toolbar?

During in-person and RON (Remote Online Notarization)* signings, all permissible users participating in the signing will have access to the InstaTag Toolbar. The InstaTag Toolbar is also available in the Pre-Close Setup and Pre-Closing phases.

What is the benefit of the InstaTag Toolbar?

The InstaTag Toolbar gives more flexibility to Pavaso's users, including:

- An additional, convenient tool for placing signatures and other tags during closing
- Quickly place signature, initials, date, custom text, checkboxes, and notary* (where applicable) tags in a pre-filled form.

Is the InstaTag Toolbar available to Signers during their Pre-Closing Document Review in advance of the signing?

The InstaTag Toolbar can be enabled and available during signings or during the Pre-Closing Document Review. The Toolbar is also available for Non-Consumers in the Pre-Close Setup phase.
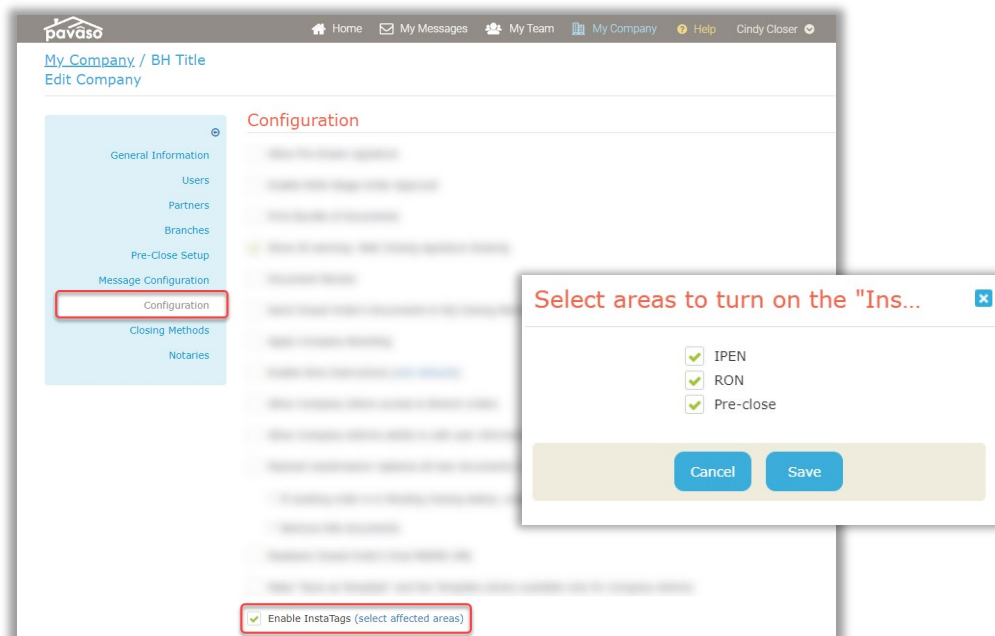
Enabling the InstaTag Toolbar

Note: *Only Company Admins have access to turn on the InstaTag Toolbar.*

1. Select **My Company** and **Edit**.
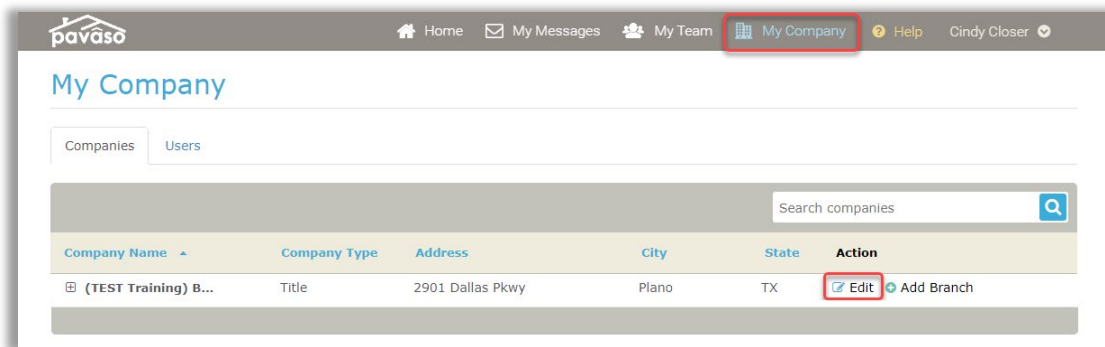
2. Select **Configuration** and **Enable InstaTags**.
3. Choose **(select affected areas)** to choose closing types where InstaTags should be enabled.

   - **IPEN** – InstaTag Toolbar appears during closing for in-person signings.
   - **RON** – InstaTag Toolbar appears during closing for remote signings.
   - **Pre-Close** – InstaTag Toolbar appears for Non-Consumer users in the Pre-Close Setup phase and for Signers during the Pre-Closing Document Review.

   *Note:* *This selection will not apply to all branches if enabled at the parent company level.*

InstaTag Toolbar – Pre-Closing
Non-Consumer View

Note: *Non-Consumer is defined by Closing Agent, Lender, Loan Officer, Loan Processor on Pavaso.*

The InstaTag Toolbar is available to Non-Consumers users when viewing a document in the **Pre-Closing Review** phase. This option is available after the Signers have been invited to the order.

To view the InstaTag Toolbar and complete a digital tag, select the appropriate document from the document list. Do not open the document in **Edit** mode.
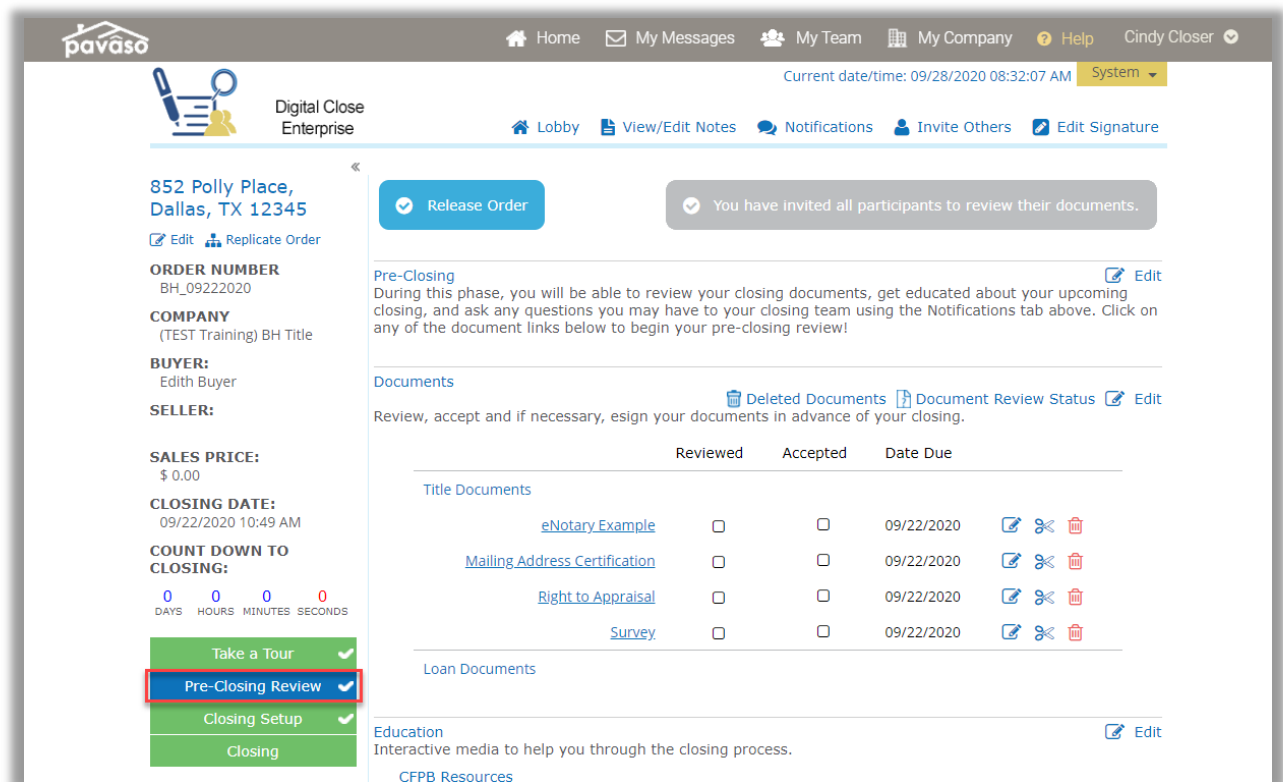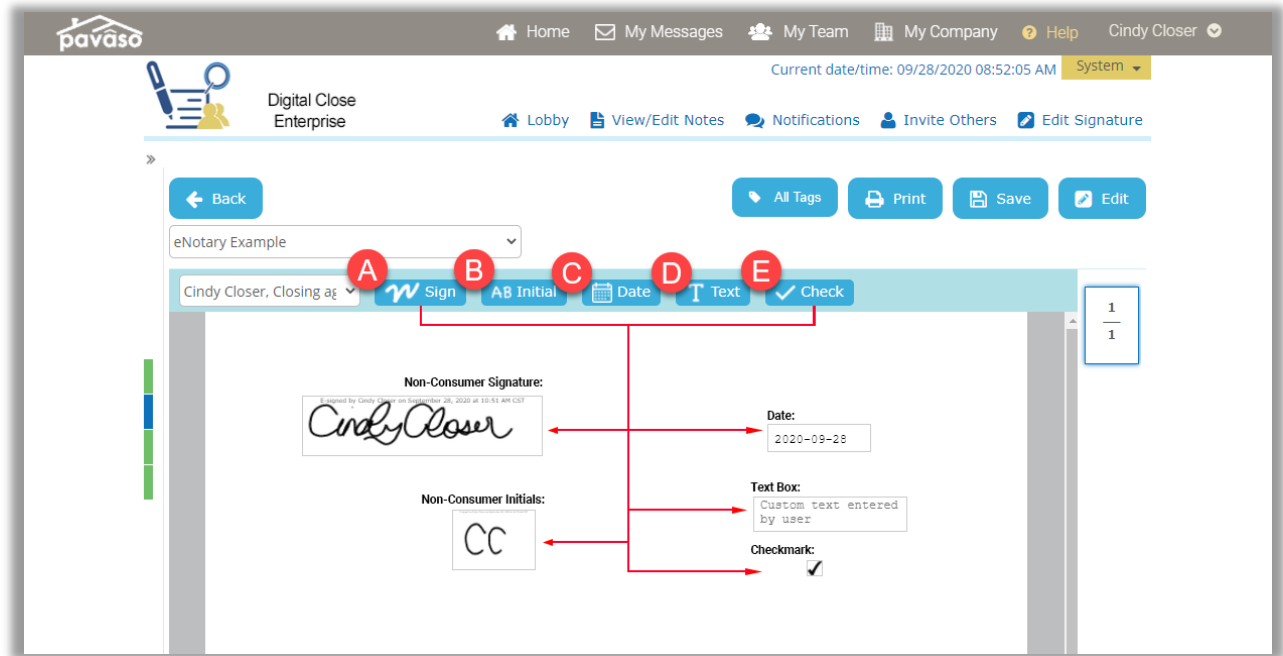

Once the document is opened, the InstaTag Toolbar appears across the top of the document. The user can select any of these options to apply to the document.
Note: *Notarization cannot be performed at this stage. Notarization must still be completed in the presence of Signers during the closing.*

A. Non-Consumer signature can be selected to place on the document. The individual who is signed in will have their signature applied. If the signature has not previously been established for the user, a pop-up appears to capture their signature.

B. Selecting **Initials** will place a complete initials tag on the document.
C. The **Date** option selects a date with the current date showing on the device being used.
D. The **Text** InstaTag places an empty text tag which can be completed by the Non-Consumer.
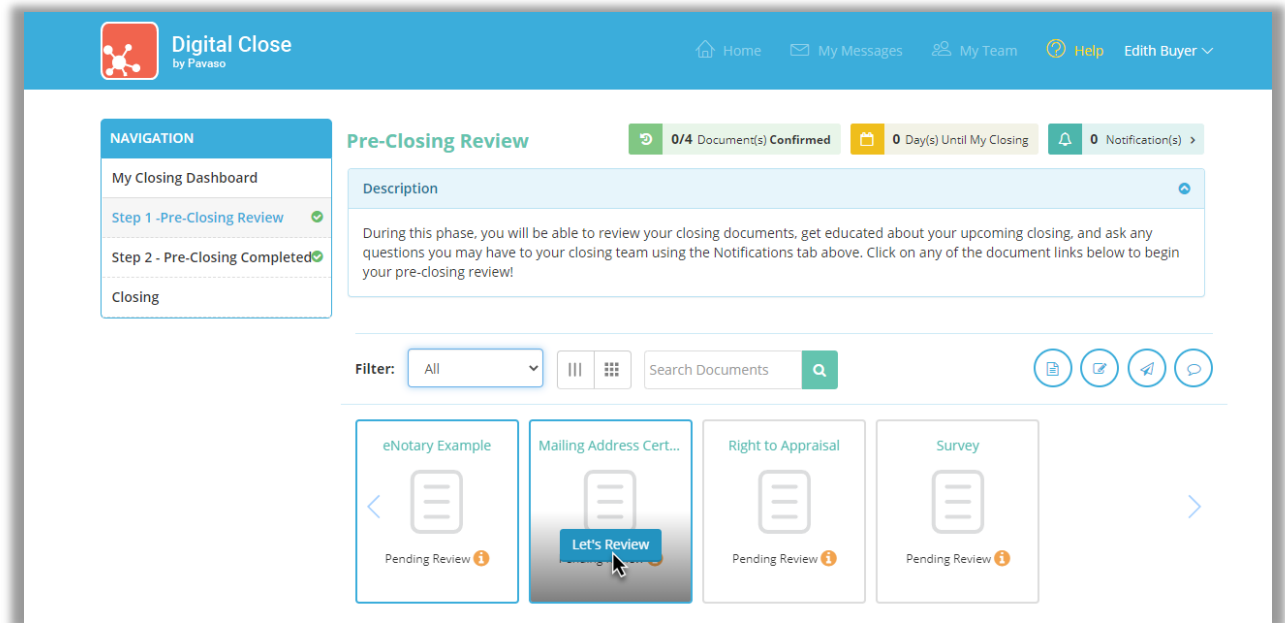E. The **Check** InstaTag places a completed checkmark.

Select **Save** after placing InstaTags. Once the document is saved, InstaTags cannot be modified.

InstaTag Toolbar – Pre-Closing

Signer View

The Signer will access their order and select a document to open.

The InstaTag Toolbar appears across the top of the document.

A. The Signer's signature can be selected to place on the document. The individual who is signed in will have their signature applied. If the signature has not previously been established for the user, a pop-up appears to capture their signature.

B. Selecting **Initials** will place a complete initials tag on the document.

C. The **Date** option selects a date with the current date showing on the device being used.

D. The **Text** InstaTag places an empty text tag which can be completed by the Non-Consumer.

E. The **Check** InstaTag places a completed checkmark.

The Signer must select **Confirm this Document** to save the InstaTags.

InstaTag Toolbar During In-Person Closings

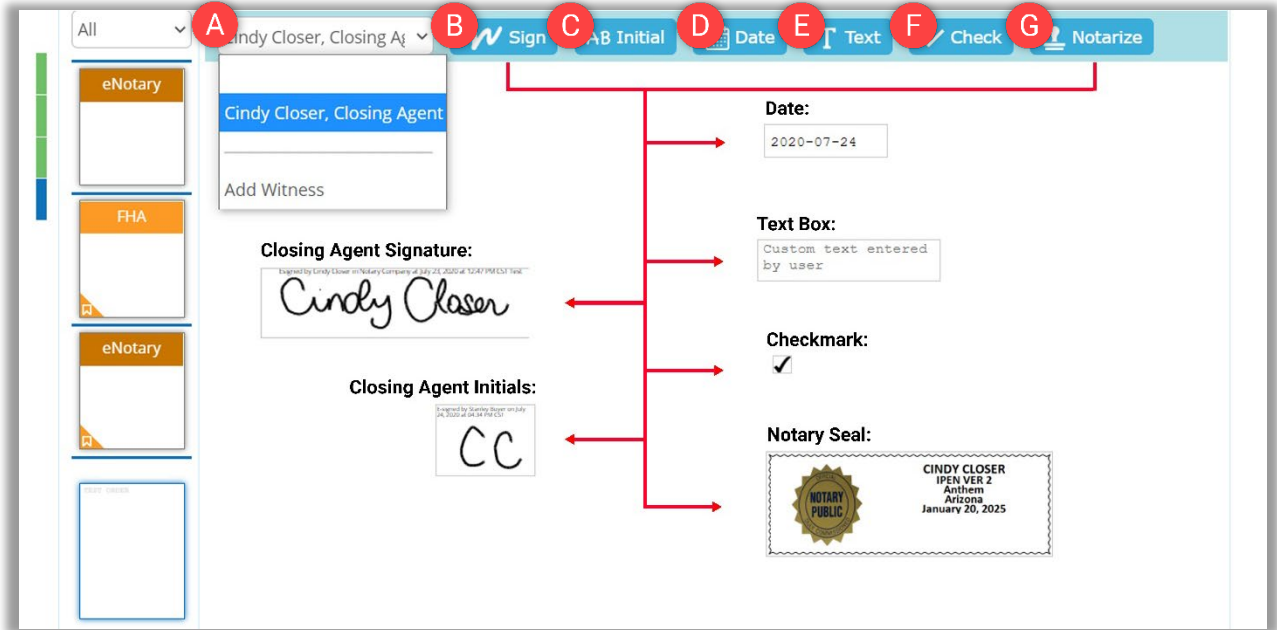The InstaTag toolbar is visible during signing above the document viewer.

A. Select the appropriate Signer from the drop-down. The **Add Witness** will prompt information for an In-Person Witness.
B. Select **Sign**. Hover over the document and click or tap to place the completed signature tag for the selected Signer.
C. Select **Initial**. Hover over the document and click or tap to place the completed initial tag for the selected Signer.
D. The **Date** InstaTag will place a completed date tag with the current date based on the time showing on the device used for the signing.
E. The **Text** InstaTag places an empty text tag to be filled out by any party present. There is no Signer assignment for the text InstaTag.
F. The **Check** InstaTag places a completed checkmark.
G. The **Notarize** InstaTag places a digital seal for the Notary conducting the signing. The **Notarize** InstaTag will only display when the Closing Agent is selected from the Signer drop-down.

# InstaTag Toolbar During RON Closings
Closing Agent View

The InstaTag Toolbar displays above the document viewer for the Closing Agent to select.

A. Select the appropriate Signer from the drop-down. The **Add Witness** will prompt information for an In-Person Witness.
B. Select **Sign**. Hover over the document and click to place the completed signature tag for the selected Signer.
C. Select **Initial**. Hover over the document and click to place the completed initial tag for the selected Signer.
D. The **Date** InstaTag will place a completed date tag with the current date based on the time showing on the device used for the signing.
E. The **Text** InstaTag places an empty text tag to be filled out by any party present. There is no Signer assignment for the text InstaTag.
F. The **Check** InstaTag places a completed checkmark.
G. The **Notarize** InstaTag places a digital seal for the Notary conducting the signing. The **Notarize** InstaTag will only display when the Closing Agent is selected from the Signer drop-down.

Signer View

The Signer can also select appropriate pre-filled tags from the InstaTag Toolbar.
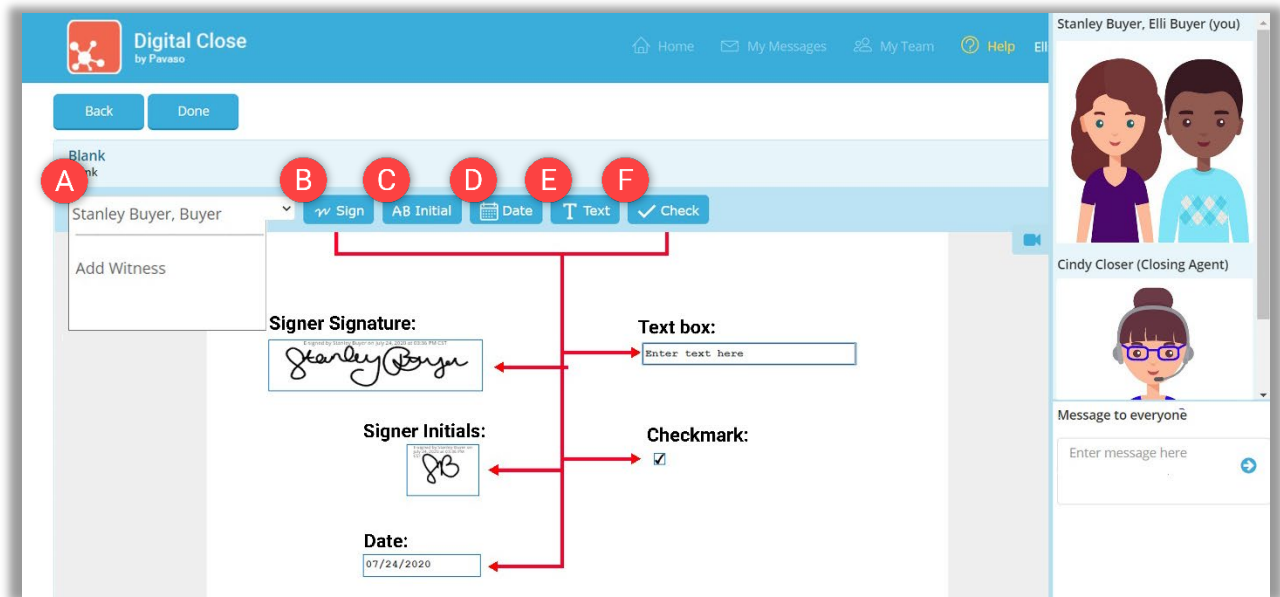
A. The Signers name will be selected by default in the drop-down. If an In-Person Witness is needed, select **Add Witness**.
B. Selecting **Sign** will place a completed signature tag on the document.
C. Selecting **Initials** will place a complete initials tag on the document.
D. The **Date** option selects a date with the current date showing on the device being used.
E. The **Text** InstaTag places an empty text tag which can be completed by the Signer.
F. The **Check** InstaTag places a completed checkmark.

InstaTag Display/Sizing

When the InstaTag is select, a red border shows around the tag.
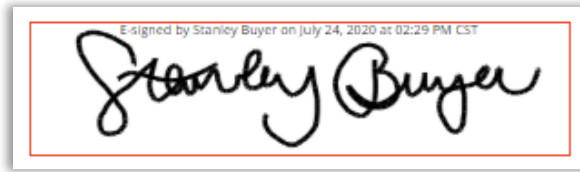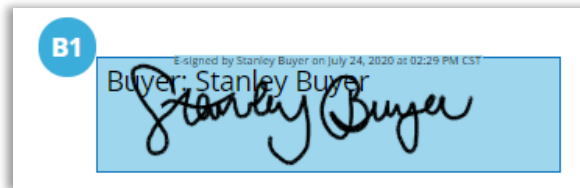
Once placed, the border will change to gray. The InstaTag can also be moved using the arrows or deleted using the trash can icon.
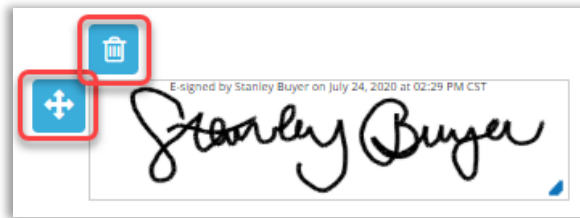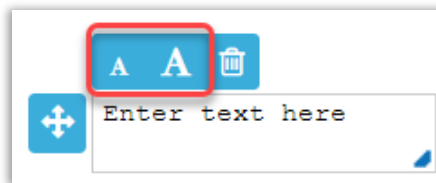
Once the document has been saved, any placed InstaTags will appear with their individual color and identifier.
Important Note: Once a document is saved, the InstaTag cannot be moved or deleted.

Font size in the text InstaTag can be increased or decreased as needed.

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