

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.

pavaso		🖶 Home 🖂	My Messages	🙅 My Team	My Com	ipany 📀 Help	Cindy Closer 📀
My Company							
Companies Users							
					Searc	h companies	Q
Company Name	Company Type	Address		City	State	Action	

- 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.

Θ	Configuration						
General Information							
Users							
Partners							
Branches							
Pre-Close Setup							
Message Configuration							
Configuration		S	elect area	as to t	urn on the	e "Ins	×
Closing Methods							
Notaries				🧹 IP	EN		
				🖌 R0	DN		
		-		🧹 Pr	e-close		
		_					
		_		Cance	el Save		
				Calle	Save	•	
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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.

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QQ			Current date	/time: 09/28/202	0 08:32:07 AM Syste	m 👻
Digital Close Enterprise		dit Notes	Notification	s 💄 Invite Ot	thers 🛛 🔗 Edit Signa	ature
« 852 Polly Place, Dallas, TX 12345	Release Order	✓ You ha	ave invited all p	articipants to re	view their document	s.
🕜 Edit 🏭 Replicate Order						
ORDER NUMBER BH_09222020	Pre-Closing During this phase, you will be able to rev	iew vour clos	sing documents	net educated a		Edit
COMPANY (TEST Training) BH Title	closing, and ask any questions you may any of the document links below to begin	nave to your	closing team u			
BUYER: Edith Buyer	Documents	• ••				
SELLER:	Review, accept and if necessary, esign yo				nt Review Status 📝	Edit
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CLOSING DATE:	Title Documents					
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DATS HOURS MINUTES SECONDS	<u>Survey</u>			09/22/2020	🖻 % 💼	
Take a Tour 🛛 🗸	Loan Documents					
Pre-Closing Review ✔	Louin Documents					
Closing Setup 🗸 Closing	Education Interactive media to help you through th	e closing pro	cess.		Ĩ	Edit
	CFPB Resources					

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.

pavâso	👫 Home 🖂 My Messages 🔹 My Team 🏢 My Company 🧿 Help 🛛 Cindy Closer 👁
Digital Close Enterprise	Current date/time: 09/28/2020 08:52:05 AM System 👻
Back eNotary Example	All Tags Print Save Edit
	AB Initial Date T Text Check
Non-Consumer	
Non-Consur	Text Box: Custom text entered by user Checkmark:

InstaTag Toolbar – Pre-Closing

Signer View

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

NAVIGATION	Pre-Closing Review 0/4 Document(s) Confirm	rmed 📋 0 Day(s) Until My Closing 🗘 0 Notification(s) >
My Closing Dashboard	Description	٥
Step 1 -Pre-Closing Review	During this phase, you will be able to review your closing documents, g	get educated about your uncoming clocing, and ask any
Step 2 - Pre-Closing Completed	questions you may have to your closing team using the Notifications ta your pre-closing review!	
Closing		
	Filter: All	
	eNotary Example Mailing Address Cert Right to App	oraisal Survey

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.

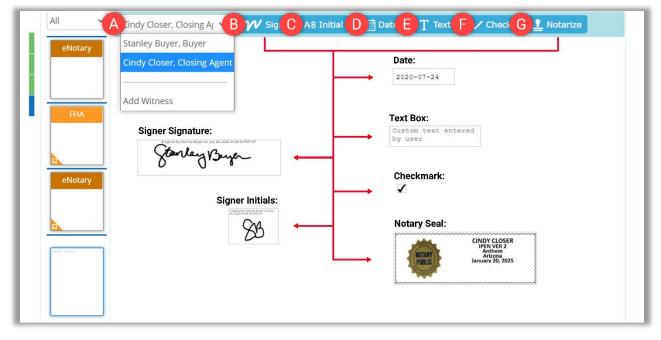
Digital Close	슈 Home 🖂 My Messages 2 My Team 🔵 Heip Edith Buyer 🗸
Mailing Address Certification Edith Buyer, Buyer	AB Initial Date T Text Check
TEST ORD	ER
MAILING	ADDRESS CERTIFICATION
RE: Loan Number: 13600307	
Property Address: 123 Left Lar	ne Plano, TX 75093
Please be advised that you are hereby correspondence to me/us regarding my/ou	instructed in accordance with the terms of the Note, to address all r loan with you to the following address.
(PLEASE CHECK AND COMPLETE C	
The property address shown above. address is:	If the property shown above consists of more than one unit, the specific
OTHER THAN PROPERTY ADD	RESS
/We will notify the Londer in writing the	uld the above mailing address be changed at any time in the future.
Borrower	C C C C

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

Digital Close			y Tearn 🛛 🕅 Hisip Edith Buyer 🗸
	address is:		
	OTHER THAN PROPERTY ADD 123 Rainbow Road	DRESS	
	I/We will notify the Lender in writing sh	ould the above mailing address be changed at any time i	n the future.
	E saved Aren Buyer September 24, 200 or 12-43 PM CST		
	Borrower	Date Borrower	Date
	Borrower	Date Borrower	Date
	Borrower	Date Borrower	Date
	MAILING ADDRESS CERTIFICATION MACLSR 08/19/13		- 11
	Go to Previous Document	Confirm this Document Document	

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

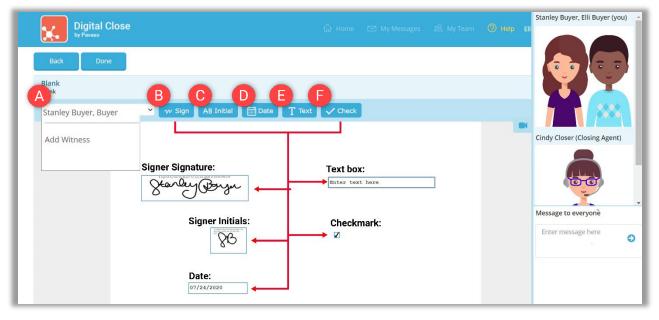
The InstaTag Toolbar displays above the document viewer for the Closing Agent to select.

All 🗸	Andy Closer, Closing At V B V Sign C B Initial D Date E Text F Check G Notarize
eNotary	Cindy Closer, Closing Agent
FHA	Add Witness
eNotary	Circly Closer Checkmark:
Rang Dense	Notary Seal:

- A. Select the appropriate Signer from the drop-down. The Add Witness will prompt information for an <u>In-</u> <u>Person Witness</u>.
- **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 <u>In-Person Witness</u> 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

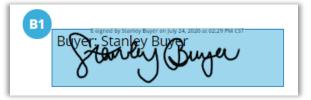
When the InstaTag is select, a red border shows around the tag.

An

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

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

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