



Multi-Device Closing* (MDC) Notary Guide

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Pavaso, Inc.

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Before You Begin

What is In Person Multi-Device Closing?

In Person Multi-Device Closing (MDC) is the act of signing and notarizing documents on separate devices in the same location as the Notary.

Signer Identity Validation

Identity proofing is used to verify and authenticate the identity of every Signer participating in an MDC session. The following are acceptable forms of identification (ID):

- Government or State Photo ID
- Passport
- Credible Witness(es)
- Personally Known

Minimum System Requirements

Please refer to <https://pavaso.com/system-requirements/> for current system requirements.

System and Order Configuration

Order Settings

MDC must be enabled for your company prior to beginning an MDC transaction. Speak with your Implementation Lead to request this feature be turned on. If you are unsure who to contact, email implementation@pavaso.com for assistance.

Access the order from the **Lobby**. Select **Edit** to enter the **Order Details** screen.

Current date/time: 02/27/2023 08:17:37 AM System

Digital Close Enterprise

Lobby View/Edit Notes Notifications Invite Others Edit Signature

1123 Street, City, TX 55185

Edit Delete Replicate Order

ORDER NUMBER: MDC Doc_1

COMPANY: Exceptional Title

BUYER: Wil Riker

SELLER:

SALES PRICE: \$ 0.00

CLOSING DATE: 04/30/2023 07:03 AM

COUNT DOWN TO CLOSING:

61 DAYS 22 HOURS 45 MINUTES 23 SECONDS

Take a Tour

Pre-Closing Review

Closing Setup

Closing

Release Order

Invite Buyer(s) to Pre-Closing

Pre-Closing abc Edit

Documents Tag Assignments Deleted Documents Document Review Status Edit

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

	Reviewed	Accepted	Date Due	
Title Documents				
NAME AFFIDAVIT - Riker	<input type="checkbox"/>	<input type="checkbox"/>	04/30/2023	
Right to Rescind - Riker	<input type="checkbox"/>	<input type="checkbox"/>	04/30/2023	

Loan Documents

Education Interactive media to help you through the closing process. Edit

Closing Checklist

Closing Checklist

CFR Resources

To enable MDC on an individual order, select the **(MDC) Multi-Device Closing** option from the drop-down. This selection must be made for each applicable order.

Note: Available options in the drop-down menu will differ depending on company configuration.

Edit Order Details

Order Information

Order number (*) MDC Doc_1	State (*) Texas	Order Template
Order Open Date 02/27/2023	Sales Price 0.00	
Closing Date (*) 04/30/2023	Closing Time (*) 08:03 AM UTC-7 MST	
Closing Type Digital Closing	Signing Process for Consumer Approve All, Sign Once	Digital Closing Method (MDC) Multi-Device Closing (Please select an item) (RON) Remote Closing and Video eNotary (MDC) Multi-Device Closing

Test Order Private Order ?

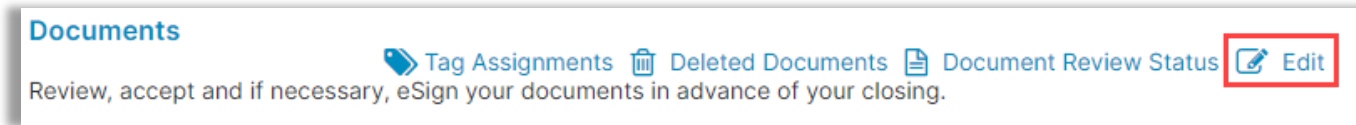
Select **Save**.



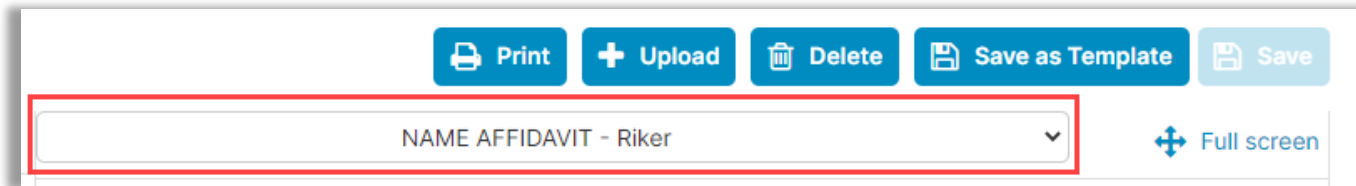
Pre-Close Tags

If documents can be signed prior to the closing, the **Pre-Closing** setting can be used and tag assignments can be applied. These tags must be completed by the Signer during the Pre-Close Review.

Select **Edit** in the Documents section.



Select document(s) from the drop down that require Pre-Closing signatures.



Select the type of tag required for signing, then click on the document to apply it.

The screenshot shows a vertical panel with the following elements:

- Name:** NAME AFFIDAVIT - Riker (with an Edit icon)
- Audience:** All (dropdown menu)
- Date Due:** 04/30/2023
- Additional Action Required at Closing
- Wet Signature Required (Hybrid Closing Only)
- Document Templates:** Please select a template (dropdown menu)
- A red box highlights five blue buttons, each with a plus sign and text:
 - + Tag for Signature
 - + Tag for Initials
 - + Tag for Education
 - + Tag for Notary
 - + Tag for Text
- Custom Tags:** --Please select-- (dropdown menu)

Signer tags can be designated for Pre-Closing or Closing. Documents requiring notarization cannot be signed during Pre-Closing.

are one and the same person.

THIS IS TO CERTIFY THAT MY LEGAL SIGNATURE IS WRITTEN AND TYPED BELOW.

Wil Riker
Print or Type Name

Arizona
State/Commonwealth of:

Maricopa
County/Parish of:

The foregoing instrument was acknowledged before me this 5th day of May
by Bob

Signature

copy tag

Details

Signer:
Wil Riker, bu

Pre-closing
 Closing

known to me to be the person whose name is subscribed and sworn (affirmed) before me and executed by the same.

Notary Signature

Notary Seal

copy tag

Comm. Exp. Date

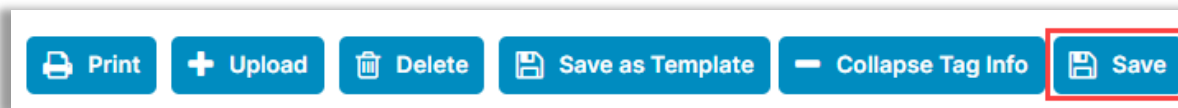
Details

Notarization Type:
Acknowledgment

Link to signer:
Buyer

NAME AFFIDAVIT
01/12/22

Once all tags for a document are placed, select **Save**.



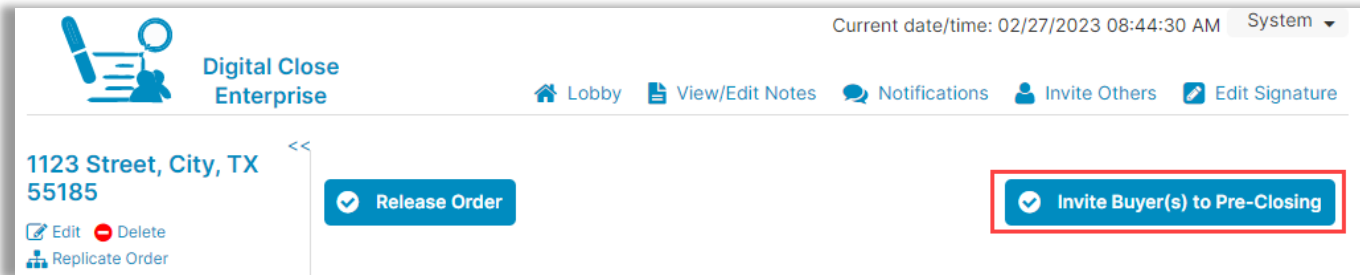
Note: Select any other documents from the drop-down menu that require tags. Once all documents have been tagged, select **Back**.

Inviting Signers

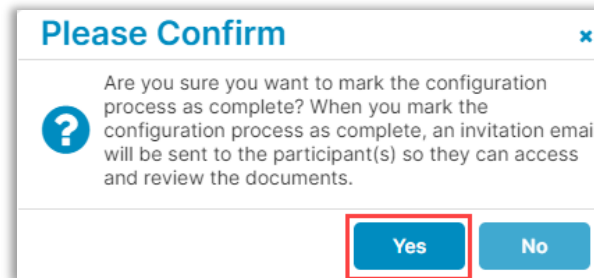
Once configuration is complete, you can invite the Signers to the order to review their documents. Selecting the **Invite Buyer(s) to Pre-Closing** button sends the invitation email asking Signers to create their account.

Note: The verbiage on the button may change, depending on whether the order contains Buyers, Sellers, or both.

*Note: The **Release Order** button is used to notify lender(s) and other parties to the transaction that the order is ready in Pavaso.*



Select **Yes**.



Performing an MDC Signing

Confirm Order Status

Prior to closing on Pavaso, the Notary must confirm the order status is **Pending Closing**. The Pending Closing status is achieved once all Signers have completed their Pre-Closing Review. If the order is not in Pending Closing status, the closing cannot begin.

The screenshot shows the 'Order Lobby' interface in the Digital Close Enterprise system. At the top, there is a navigation bar with 'Lobby', 'Create Order', 'Notifications', and 'Admin' links. The current date/time is 02/27/2023 08:56:15 AM. Below the navigation, the 'Order Lobby' title is displayed, along with a date range filter from 11/29/2022 to 2/27/2023 and a search bar. A table of orders is shown, with one order highlighted in red. The table has columns for Order Number, Loan Number, Borrower, Seller, Notary, Company, Property, Scheduled Closing Date, Actual Closing Date, and Status. The highlighted order is 'MDC Doc_1' with a status of 'Pending Closing'.

ORDER NUMBER	LOAN NUMBER	BORROWER	SELLER	NOTARY	COMPANY	PROPERTY	SCHEDULED CLOSING DATE	ACTUAL CLOSING DATE	STATUS
MDC Doc_1		Wil Riker		Doe Closer	Exceptional Title	1123 Street, City, TX 55185	04/30/2023 07:03:00 AM		Pending Closing

When all Signers are present and have compatible devices, select **Muti-Device Closing**, then **Continue**.

Select where you want to close:

WEB CLOSING
(Any web browser)

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

CLOSING AGENT ACCESS

PAPER CLOSING

Click **Add**, select the Buyer(s) and then **Add**.

Note: Select *Invite* to add witnesses or other Notaries.

Note: The Signer will need to join the signing session on their device and check-in.

→

Add Participants [X]

Select the users from this order that you would like to add as Participants to this Signing Session.

<input checked="" type="checkbox"/>	Participant Name	Role
<input checked="" type="checkbox"/>	Wil Riker	Buyer 1

If you see Place of Notarization and Notary Residence Information fields, complete them and select **Continue**. This may or may not display, depending on your state.

Note: Selecting **Proceed without eNotary** will prompt you to enter the information for a valid eNotary in Pavaso.

Location Information [Close]

Your state requires that you provide the following location information for this signing session.

Place of Notarization

- * State: Texas
- * County: Select a county...
- * City: Select a city...

Notary Residence Information

- My residence information is the same as the place of notarization
- * State: Texas
- * City: Select a city...

[Proceed without eNotary] [Cancel] [Continue]

Verify, edit, or draw your signature and initials. Select **Continue**.

Edit Signature & Initials [Close]

Please create your signature and initials. By selecting "Continue", you agree that the signature and initials you set will be the electronic representation of your signature and initials on all closing documents.

Hand-Drawn

Draw your **SIGNATURE** inside the dotted lines

Draw your **INITIALS** inside the dotted lines

[Clear] [Clear]

[Cancel] [Continue]

ID Validation

ID validation is available, if desired. To validate the Signer's ID, select **Validate**.

Accept eConsent	Signature Setup	Identification
✓	✓ View	Validate

If you choose to skip this step, select **Start Signing** to enter the session.

0% Complete Contact Support End Session

Signature & Initials Candy Clower CC **Start Signing >**

Participant Role & Name	Accept eConsent	Signature Setup	Identification
Buyer 1 Stanley Buyer	✓	✓ View	Validate

When manually verifying an ID, select the appropriate ID being presented from the drop-down menu.

Enter ID Information for Notary Journal Entry ✕

You can enter this participant's ID information to expedite your journal entry at the end session.

Wil Riker
4567 Street, City, TX 85555

* Type of ID Select type of ID... ▾

- Select type of ID...
- Driver's License
- Identification Card
- Passport
- Credible Witness(es)
- Personally known

Cancel e

Complete the fields for the Signer's ID. The information entered on this screen will automatically be saved and recorded in the eNotary Journal created at the end of the signing. Select **Continue** to save the information.

Note: This step does not confirm the validity of the chosen form of ID. To validate the ID, select **eValidate Instead**.

Enter ID Information for Notary Journal Entry ✕


You can enter this participant's ID information to expedite your journal entry at the end session.

Stanley Buyer
123 Right Road, Dallas, TX 12345

* Type of ID

License Number

Address

Expiration Date 

State

To eValidate the ID, select **eValidate Instead**. Select the type of ID, country code and enter a phone number. The Signer will receive a text message with a link to a webpage where they will validate their ID.

Note: The phone in use must comply with our [minimum system requirements](#).

eValidation ID for Stanley Buyer ✕

To eValidate this participant's identity by smartphone, select one of the following forms of government-issued photo identification, enter the phone number, and select "Continue" to send the validation link.

* Type of ID

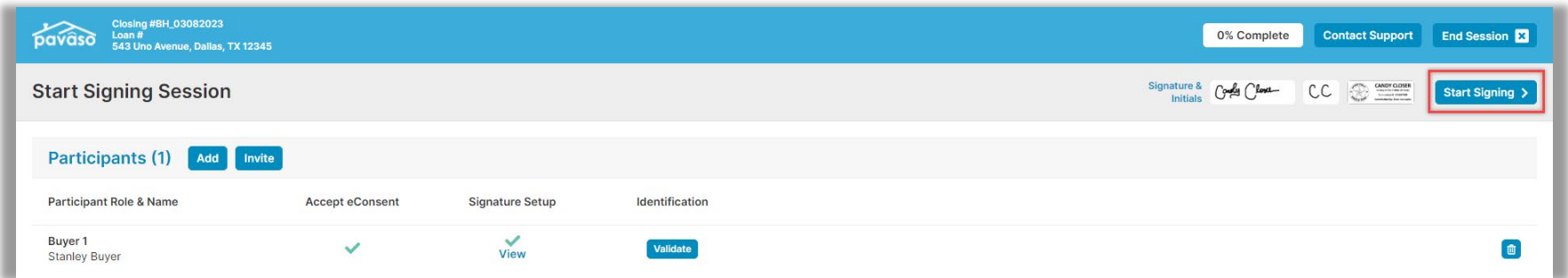
* Country Code

* Phone Number

Starting the Closing Session

Sending Documents for Signature

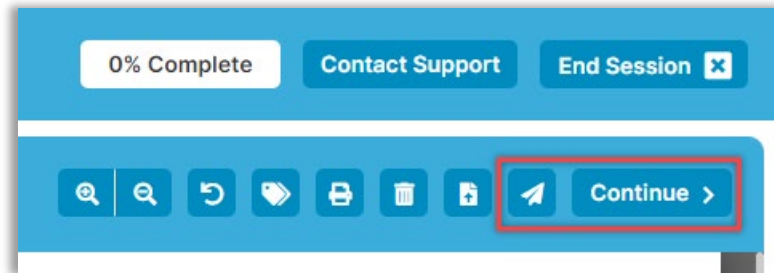
When all Participants are ready to begin, select **Start Signing**.



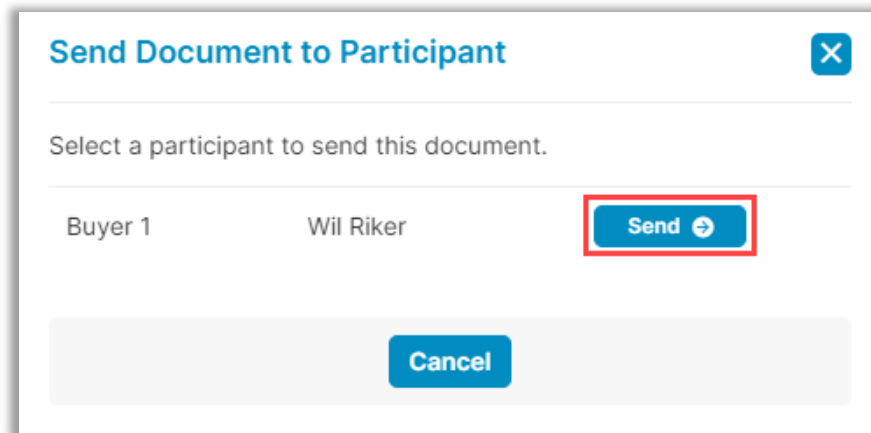
The **InstaTag** toolbar can be used to zoom, rotate, tag, print, delete, upload and send documents to the Buyer.



From within the signing, select **Continue** or the paper airplane icon to send the document to the Signer.



Select the appropriate Signer who needs to complete the task on the document. In this example, there is one Signer, but all Signers on the order will display here. The Signer complete the document, then select **Send** and the document will be returned to you.



When a document is sent back, you'll complete any pending signature tags or Notary stamps.

SIGNATURE IS WRITTEN AND TYPED BELOW.

Buyer: Will Riker
E-signed by Will Riker on March 2, 2023 at 09:10 AM CST. Notary Tag added. biên ghi add notary tag not seen theo tag

Will Riker 03/02/2023

Signature

me this _____ 5th day of _____ May _____,

and sworn (affirmed) before me and executed by the same.

Notarial for Buyer

Notary Public

My Commission Expires: _____



known to me to be the person whose name is subscribed and sworn (affirmed) before me and executed by the same.

Notarial for Buyer
Doe Closer

Notary Public

Does not expire

My Commission Expires: _____

IPEN E-SIGNED BY DOE CLOSER ON MARCH 2, 2023 AT 09:14 AM CST

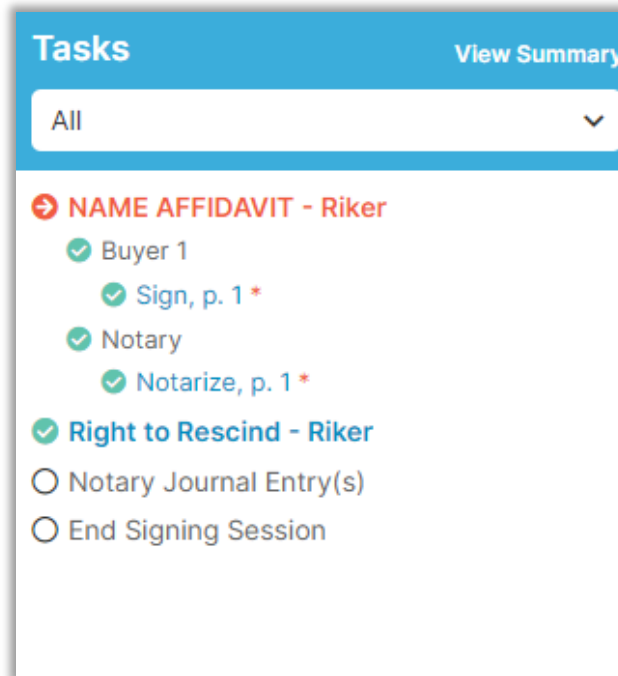
NOTARY PUBLIC

IPEN E-signed by Doe Closer on March 2, 2023 at 09:14 AM CST

Exceptional Title _____

NAME AFFIDAVIT
01/12/22

Task progress can be monitored via the task list.



When all tasks on a document are complete, select **Continue**.

Note: Continue will automatically move you to the next document(s)/tasks. Repeat this step until all tasks are complete.



For signings where eNotarization occurs, review the eNotary Journal and complete all required fields. If ID information was entered at the beginning of the signing or the eValidation option was used, the information captured will display here. Select **Continue** once all fields are complete. Select **Opt Out of Notary Journal** to opt out.

Entry 1 (Buyer 1)
Wil Riker

Date of Notarization March 2, 2023

Description/title of document(s) Mortgage Documents

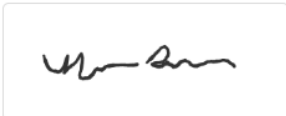
Document Date 03/01/2023

Type of notarial act Acknowledgement ▼


[+ Add notarial act](#)

Name of Signer Wil Riker

Address of Signer 4567 Street, City, TX, 85555

Signature of Signer 

Name of witness Bill Kid

Signature of witness 

[Delete](#)

Address of witness 1123 Street

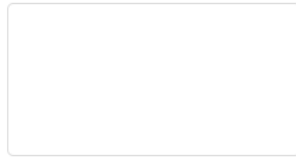
* Type of ID Used to verify Personally known ▼

Number of ID 12335

Opt Out of Journal **Continue >**

Number of ID 12335

ID expiration date 03/09/2023

Thumb print 

[Choose file...](#)
(File extension: *.jpg, *.png, *.jpeg, *.gif, *.bmp)

Name of seller

County location of property United States

Number of documents in the group 2

Fee charged \$10.00

Document Authentication Number (DAN) 234324234234234

Place where notarial act was performed Texas

Comments (optional)


Select **End Session**.

All actions for this signing session have been completed.
At this time, you may dismiss the participants and end the session.

End Session

Select **Close this Order**.

Signing session has ended

 The signing session has ended, and this order can now be closed.
Your Notary Journal Entries are now available - [Download now](#)

Where would you like to go next?

Close this Order **Order Lobby**

Post-Closing

The Post-Closing screen allows downloads of the Audit Report, documents and journal entries.

Digital Close Enterprise Current date/time: 02/27/2023 09:59:35 AM System ▾

1123 Street, City, TX 55185

View Delete Archive

ORDER NUMBER: MDC Doc_1

COMPANY: Exceptional Title

BUYER: Wil Riker

SELLER:

SALES PRICE: \$ 0.00

CLOSING DATE: 04/30/2023 07:03 AM

ACTUAL CLOSING COMPLETED: 02/27/2023 09:53 AM

Post Closing

Documents
The documents listed below are the signed copies of your closing package.

	Date Completed	
Audit Log This Audit Log contains all of the activity from this Digital Closing up to the completion of the closing process.		
AuditReport	N/A	Download Print
Complete Package		
Bundle of all Documents	N/A	Download Print
Order Documents		
NAME AFFIDAVIT - Riker	02/27/2023	Download Print
Right to Rescind - Riker	02/27/2023	Download Print
Additional Order Documents		
Journal Entries		
Journal Entries	02/27/2023	Download

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](#)