

# Digital Close Enterprise Push to Pending Closing

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Pavaso, Inc.

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## What is the Push to Pending Closing feature for?

The Push to Pending Closing feature allows for the session Conductor to move the order to the Pending Closing status. An order in the Pending Closing status can proceed with closing.

There may be instances where a Signer does not complete their document review or does not activate their Pavaso account. In these cases, the Push to Pending Closing feature can be used.

### **Admin Setup**

Log into Pavaso and select My Company.

🐴 Home 🔽 My Messages 🚔 My Team	📕 My Company 🛛 🚱 Support	Center Jean-Luc Picard 오
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#### Select Edit under Action.

My Company						
Companies Users						
				Search	companies	Q
Company Name 🔺	Company Type	Address	City	State	Action	
Stargazer Title	Title	1234 awesome rd	Phoenix	AZ	🕼 Edit 🔮 Add Branch	
					Display	1 of 1 items

Select Configuration.



Verify or select the Enable Push to Pending Closing box.



# **Using the Push to Pending Closing Option**

#### Select the Order.

Note: The order must be in Pending Review, Under Review, or Configuration Needed to use this feature.

		삼 Hom	e 🔤 My Messages	🚰 My Team	Support Center	Discovery Lendin
	Digital Close Enterprise			Current	Lobby Create C	23 07:58:55 AM Drder Admin
Order Lobby Select an Order belo	<b>y</b> w to view the details	Search Crite	Display orc	lers from: 5/13/2	2023 to: 8/1'	1/2023
Open Closed						
ORDER LOAN NUMBER	NUMBER BORROWER SELLER	NOTARY C	OMPANY PROPERTY	SCHEDULE CLOSING DATE 🚽	D ACTUAL CLOSING S DATE	STATUS 🔽
1593827 29874	293870 Wil Riker	N/A St Ti	targazer 1123 Street, itle City, TX 551	08/11/2023 07:40 AM 185 Mountain	F	Pending Review

If not already selected, choose Invite Buyer(s) to Pre-Closing.

Digital Cl	Current date/time: 08/17/2023 08:48:04 AM
Enterpri	Se 👚 Lobby 📔 View/Edit Notes 🗩 Notifications 💋 Edit Signature
1123 Street, City, TX 55185	< Invite Buyer(s) to Pre-Closing
📝 Edit  🛔 Replicate Order	
ORDER NUMBER: pushtopendingclosing1234	Pre-Closing
COMPANY: Stargazer Title	During this phase, you will be able to review your closing documents, get educated about your upcoming closing, and ask any questions you may have to your closing team using the Notifications tab above. Click on any of the document links below to begin your pre-closing review!
BUYER: Wil Riker	

#### On the pop-up, select **Yes**.



#### Select Closing Setup.

1123 Street, City, TX 55185
📝 Edit 🛛 🛔 Replicate Order
ORDER NUMBER: pushtopending2
COMPANY: Stargazer Title
BUYER: Wil Riker
SELLER:
SALES PRICE: \$ 0.00
CLOSING DATE: 08/15/2023 08:00 PM Mountain
COUNT DOWN TO CLOSING:
0 8 0 52 DAYS HOURS MINUTES SECONDS
Take a Tour 🛛 🗸
Pre-Closina Review
Closing Setup
Closing

#### Select Push to Pending Closing.

Digital C Enterpr	Current date/time: 08/11/2023 07:56:04 AM Close rise
1123 Street, City, TX 55185 C Edit ORDER NUMBER: 15938273959	Closing Setup During this phase, the Lender and your Title Company should make sure that all of the documents listed below are the ones needing to be presented at the final closing table. If you wish to change the stacking order of the documents, you may do so by clicking on 'Rearrange Documents.' If you need to Wet-ink sign any documents at the closing, you can click on the printer icon next to the document title.
COMPANY: Stargazer Title BUYER: Wil Riker SELLER:	Documents       Deleted Documents       Rearrange Documents       Document Review Status         Push to Pending Closing         Review, accept and if necessary, eSign your documents in advance of your closing.
SALES PRICE: \$ 0.00 BASE LOAN AMOUNT: \$ 346,983.00	Wet Signature Reviewed Accepted Date Due Added By Required (Hybrid Closing Only)

Select Yes. The order status will change to Pending Closing.



### Conducting the Signing Checking in

Push to Pending Closing feature allows users to verify themselves without activating their account prior to the Signing. Select the Closing Type and **Continue.** 

Select where you v	vant to close:
WEB CLOSIN (Any web brow	IG ser)
REMOTE ONLINE ( (Minimum browser requirements: Chrome 13 for macO	CLOSING 72, Firefox 52, Opera 60, Safari 5)
MULTI-DEVICE CI (Any web browser, all participants	OSING using their own device)
CLOSING AGENT	ACCESS
PAPER CLOSI	NG
	n Continue <del>&gt;</del>

This example shows one Participant has not activated their Pavaso account. Select **Pending** to send a security code.

Participants (3)	Add Invite	
Participant Name	Role	Status
Wil Riker	Buyer 1	Check In
Jadzia Dax	Buyer 2	O Pending
Tom Paris	Buyer 3	Check In

#### Select **Continue** to send code.

Participant has not created account								
Jadzia Dax has not created a Pavaso account. Select a method to send a security code to them so you can proceed.								
* Method	Email 🗸							
* Email Address	j****x@mailinator.com							
Cancel	Continue							

The Participant receives an email with a security code.

To securely enter yo	your place for everything home Security Code
Verification code: 6466 Sincerely.	a closing, enter ale code provided below.
The Pavaso Team	© Pavaso 5801 Tennyson Pkwy, Suite 500   Plano, TX 75024 Pavaso.com   800.542.5503

#### The Participant should read the Consent for use of Electronic Signatures page, then enter their security code.

*Note* If another code is needed, select **Resend Security Code**.

Closing #pushtopendingclosing1234 Loan # 1123 Street, City, TX 55185								0% Complete	Contact Support	End Session X
Check In for Jadzia Dax - eConsent									I	Back to Participants
In order to proceed with your digital closing, please read the following consent, then e	nter your Verification Code and select "Accept	ept" below.								
Consent for use of Electronic Signatures and Audi	o-Video Records:									
Pavaso is required by law to provide you with certain disclosures regarding documents a deliver Required Information to you by: displaying or delivering the Required Information	and information involved in your real estate tran electronically; and requesting that you print or	ansaction, which inclu or download the Requ	cludes the vital docu quired Information a	umentation nece and retain it for y	essary to consumma our records.	te your financing for	the transaction (colle	ectively, "Required Inform	mation"). With your co	nsent, Pavaso can
This notice contains important information that you are entitled to receive before you co information in connection with your real estate transaction and/or financing application.	onsent to electronic delivery of Required Informa Please read this notice carefully and print or do	mation. Your consent download a copy for	nt also permits the g r your files.	general use of el	lectronic records, ele	ectronic signatures, i	lentification verificat	ion, audio-video record	ing, and transmitting,	sharing, and storing
After you have read this information, if you agree to receive Required Information from P please click on the "I agree" button where indicated.	Pavaso electronically, and if you agree to the ger	general use of techno	ology-based identi	ification verificati	ion, audio-video rec	ording, electronic re	ords, and/or electro	nic signatures in connec	tion with your relation	ship with Pavaso,
Statement of Electronic Disclosures:										
You may request to receive Required Information on paper, but if you do not consent to real estate transactions, which includes you.	electronic delivery of Required Information, Pav	avaso cannot proceed	ed with the electror	nic portions of ye	our real estate trans	action and/or financ	ng application to be	facilitated through our to	echnology, for the par	ties involved in these
If you consent to electronic delivery of Required Information, you may withdraw your co	nsent at any time. However, if you withdraw you	your consent, we will r	I not be able to con	ntinue processing	g the electronic porti	ions of your real esta	e transaction and/o	r financing application w	e facilitate through ou	ur technology.
f you consent to electronic disclosures, that consent applies to all Required Information	Pavaso gives you, or receives from you, in con	onnection with your re	real estate transact	tion and/or finan	cing application, as	well as associated n	tices, disclosures, a	nd other documents.		
Depending upon the type and specifics of your real estate transaction, the Required Info	ormation covered by the consent may include, b	e, but is not limited to:	D:							
Loan Estimate;     A Promissory Note, or s     Closing Disclosure;     Ownership Affidavit, or similarly named declaration;     Transfer Tax, sassessme     Escrow settlement or ck	imilarly named Note; age, or other likewise named security instrumen nt(s), and associated government forms, losing statement, documents, notices and/or dis	ient; disclosures;								
You agree to print out or download Required Information when we advise you to do so, a contact information, please contact Pavaso.	and keep it for your records. If you have any tro	rouble printing out or	r downloading any	Required Inform	ation, you may call F	avaso and request p	aper copies at 866 2	88 7051. If you need to	update your e-mail ad	dress or other
If you wish to withdraw your consent to electronic disclosures, you may do so by selecti Pavaso.	ing the opt-out option in your financing applicat	cation, or notify Pavas	aso. After consentin	ng to receive and	d deliver Required Inf	formation electronica	lly, you may, upon re	quest, obtain a paper c	opy of the Required In	formation by calling
Software and Hardware Requirements:										
To access and retain Required Information from Pavaso, you must:										
Be able to view the disclosures on your monitor and send screen prints to your pri     Have access to an Internet service account and use a current version of Internet F	inter, which can be done with your browser. Explorer Microsoft Edge Google Chrome Firefo	efov or Safari to recei	eive required inform	nation						
		* Enter Security Co	Code Resend Seco	Curity Code						
		Declin	ine Accept							
ter code and select <b>Accept</b> .	* Enter Security (	Code F	Resend	Securi	ty Code	J				

The Participant will be required to add their signature and initials. Sign in the boxes and select Adopt.

Note: Select Clear to redo Signature or Initials.

Han	d-Drawn		
Draw your SIGNATURE inside the dotted lines	Draw your INITIALS inside the dotted lines		
Jul Dom.	J.D		
Clear	Clear		
Adopt			

The Participant is now set up for validation and closing once the other Participants check in.

Role	Status		
		Signature & Initials	Identification
Buyer 1	Check In		
Buyer 2	✓ Ready	fd Car	Validate
Buyer 3	Check In		
	Buyer 1 Buyer 2 Buyer 3	Buyer 1     Check In       Buyer 2 <ul> <li>Ready</li> </ul> <li>Buyer 3</li> <li>Check In</li>	Buyer 1     Check In       Buyer 2     ✓ Ready       Buyer 3     Check In

### **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