



# Digital Close Enterprise

## Push to Pending Closing

Revised: 08/18/2023

Pavaso, Inc.

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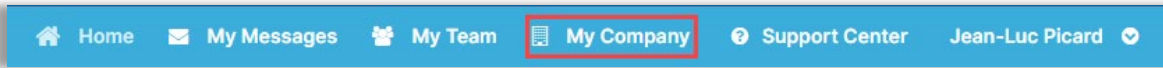
## What is the Push to Pending Closing feature for?

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.

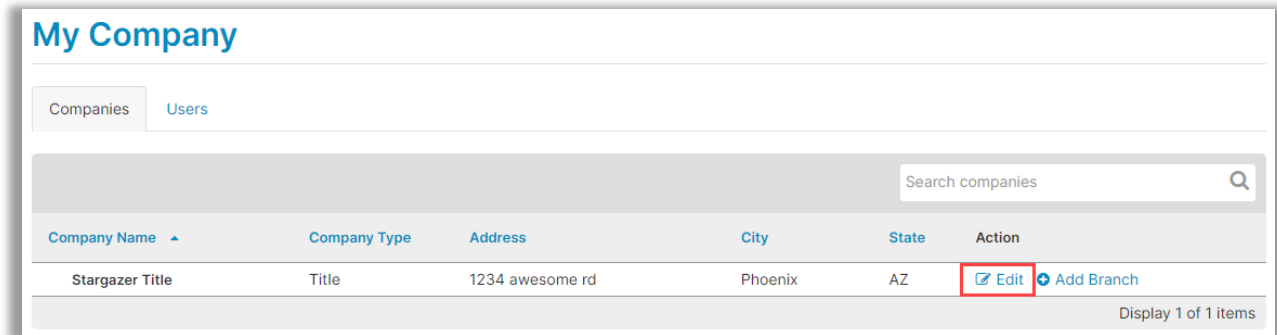
There may be instances where a Signer does not complete their document review or does not activate their Pavaso account. In these cases, the Push to Pending Closing feature can be used.

# Admin Setup

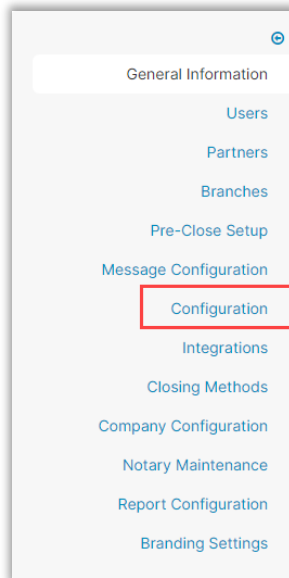
Log into Pavaso and select **My Company**.



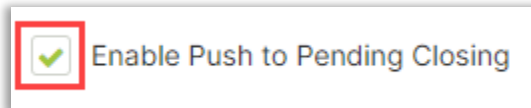
Select **Edit** under Action.



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.

Order Lobby

Select an Order below to view the details

Display orders from: 5/13/2023 to: 8/11/2023

Search Criteria: Order Number Search Order Search

Open	Closed	ORDER NUMBER	LOAN NUMBER	BORROWER	SELLER	NOTARY	COMPANY	PROPERTY	SCHEDULED CLOSING DATE	ACTUAL CLOSING DATE	STATUS
		1593827...	29874293870	Wil Riker		N/A	Stargazer Title	1123 Street, City, TX 55185	08/11/2023 07:40 AM	Mountain	Pending Review

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

1123 Street, City, TX 55185

Invite Buyer(s) to Pre-Closing

Pre-Closing

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!

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

Please Confirm

Are you sure you want to mark the configuration process as complete? When you mark the configuration process as complete, an invitation email will be sent to the participant(s) so they can access and review the documents.

Yes No

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-Closing Review

**Closing Setup**

Closing

Select **Push to Pending Closing**.

Digital Close Enterprise Current date/time: 08/11/2023 07:56:04 AM

[Lobby](#) [View/Edit Notes](#) [Edit Signature](#)

**1123 Street, City, TX  
55185** [Edit](#)

ORDER NUMBER:  
15938273959

COMPANY:  
Stargazer Title

BUYER:  
Wil Riker

SELLER:

SALES PRICE:  
\$ 0.00

BASE LOAN AMOUNT:  
\$ 346,983.00

**Closing Setup** [Edit](#)

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.

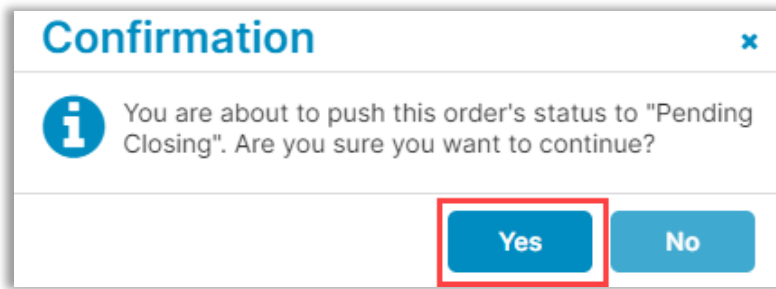
**Documents** [Deleted Documents](#) [Rearrange Documents](#) [Document Review Status](#)

**Push to Pending Closing**

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

Reviewed	Accepted	Date Due	Added By	Wet Signature
				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 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)

CLOSING AGENT ACCESS

PAPER CLOSING

[↔ Change Closing Platform](#) [Continue →](#)

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

Participants (3) <a href="#">Add</a> <a href="#">Invite</a>		
Participant Name	Role	Status
Wil Riker	Buyer 1	<a href="#">Check In</a>
Jadzia Dax	Buyer 2	<a href="#">⏸ Pending</a>
Tom Paris	Buyer 3	<a href="#">Check In</a>



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 Address

The Participant receives an email with a security code.



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*.

The screenshot shows the Pavaso digital closing interface. At the top, the Pavaso logo and contact information are visible. The page title is "Check In for Jadzia Dax - eConsent". A progress bar indicates "0% Complete". Below the title, there is a "Back to Participants" button. The main content area contains a consent form with the following sections:

- Consent for use of Electronic Signatures and Audio-Video Records:** A paragraph explaining the required information and the user's consent.
- Statement of Electronic Disclosures:** A list of disclosures including Loan Estimate, Good faith estimates of closing costs, Closing Disclosure, Ownership Affidavit, Promissory Note, Deed of Trust, Mortgage, Transfer Tax, and Escrow settlement.
- Software and Hardware Requirements:** A list of requirements such as being able to view disclosures on a monitor and having an internet connection.

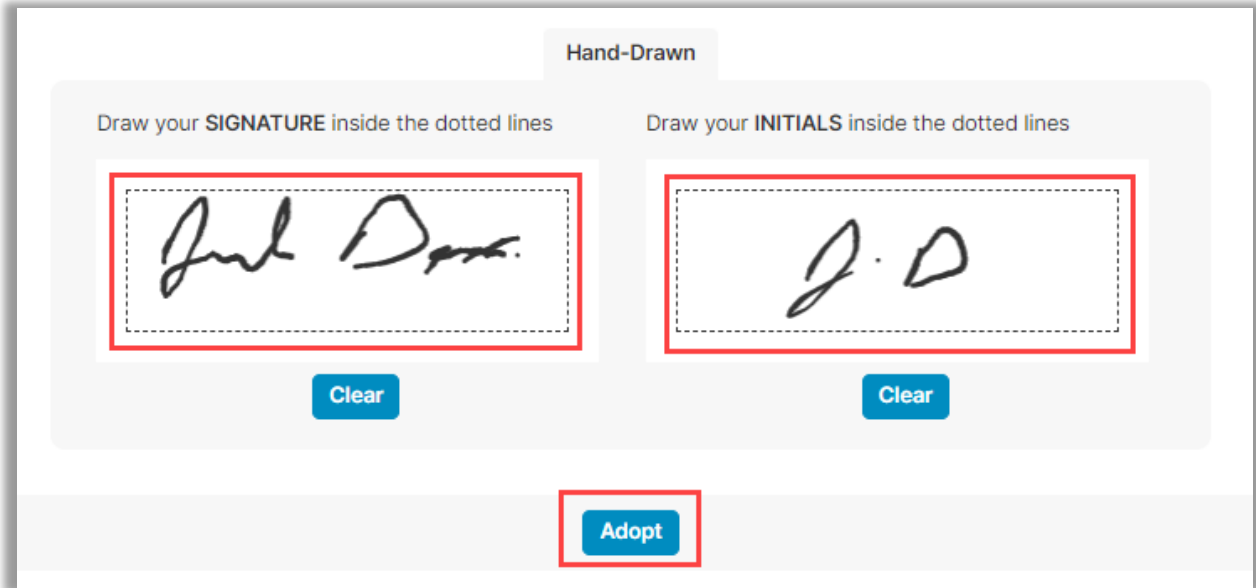
At the bottom of the form, there is a field for "Enter Security Code" with a "Resend Security Code" link and two buttons: "Decline" and "Accept".

Enter code and select **Accept**.

This is a close-up view of the security code entry field and the "Accept" button. The field is labeled "Enter Security Code" and contains four dots. Below the field is a "Resend Security Code" link. The "Accept" button is highlighted with a red box, and a blue arrow points from the "Accept" button in the screenshot above to this "Accept" button.

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.



The interface is titled "Hand-Drawn" and contains two drawing areas. The left area is labeled "Draw your SIGNATURE inside the dotted lines" and shows a handwritten signature "Jadzia Dax" within a red-bordered box with a dashed inner line. Below it is a blue "Clear" button. The right area is labeled "Draw your INITIALS inside the dotted lines" and shows the initials "J.D" within a similar red-bordered box with a dashed inner line. Below it is another blue "Clear" button. At the bottom center of the interface is a blue "Adopt" button, which is highlighted with a red border.

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

Participants (3) <span>Add</span> <span>Invite</span>				
Participant Name	Role	Status	Signature & Initials	Identification
Wil Riker	Buyer 1	<span>Check In</span>		
Jadzia Dax	Buyer 2	<span>✓ Ready</span>	<span>Jadzia Dax</span> <span>J.D</span>	<span>Validate</span>
Tom Paris	Buyer 3	<span>Check In</span>		

## Pavaso Support

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

**Phone/ Closing Hotline:** (866) 288-7051

**Email:** [support@pavaso.com](mailto:support@pavaso.com)

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