



TrailFix

Closing Agent/Notary Guide

Revised: 10/3/2022

Pavaso, Inc.

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What You Need to Know about TrailFix

What does TrailFix do, and how does it enhance the platform?

TrailFix allows you to re-open an order, upload additional documents, and send those documents for signature. The signature can be captured via IPEN, RON, or the Signer using their own device at a separate location without needing to interact with the Notary.

Does the order have to be in a specific status or type to use this feature?

The order must be in the Closed status to use TrailFix.

How do I turn this feature on?

Contact your Implementation Lead or support@pavaso.com.

Who can use this feature?

TrailFix is for Closing Agent/Notary users only. This is not available for Lender users.

How many times can a package be modified?

The package can be modified and closed as many times as needed.

Can a package be modified using a different signing method than when the order was originally closed?

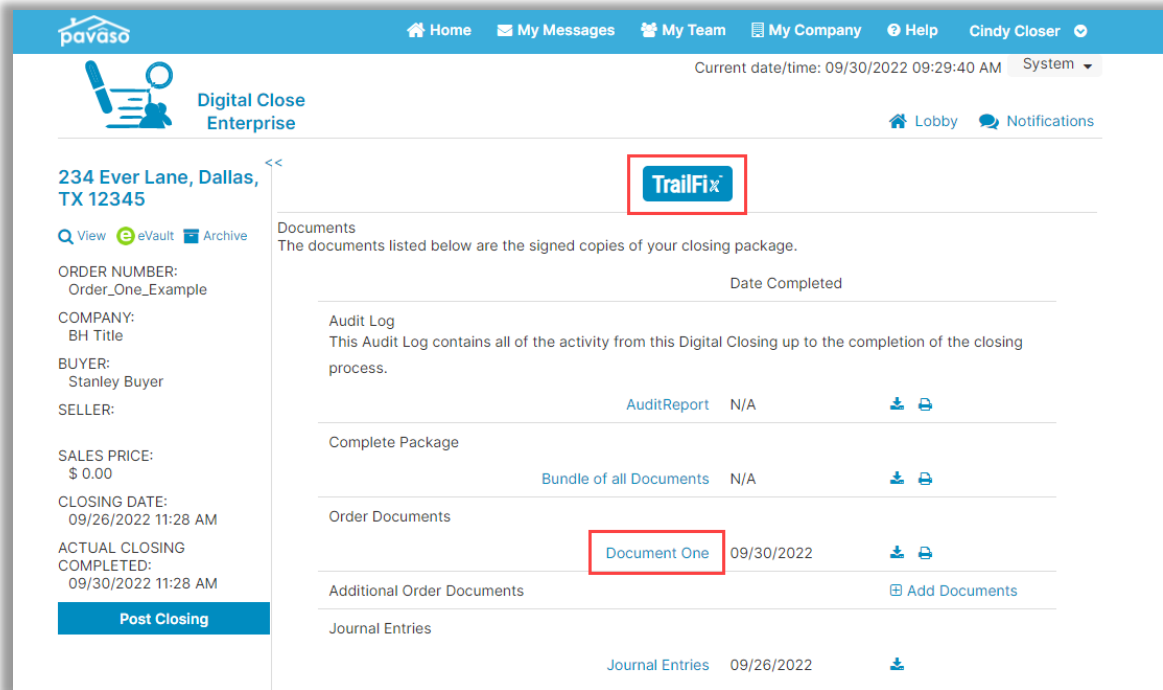
Yes. For example, if the package were signed using RON, the modified documents can be signed using IPEN, RON, or with the Signer using their own device.

Sending a Document Using In-Person eNotarization (IPEN)

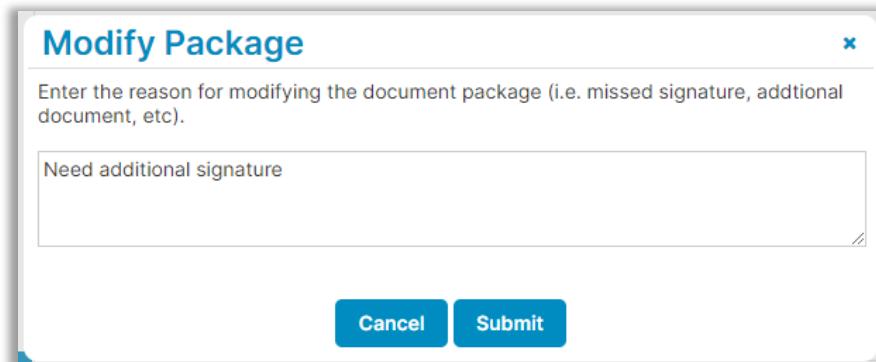
IPEN – Closing Agent View

Note: This guide refers to Closing Agent. This is intended to be inclusive of anyone with the Closing Agent role type.

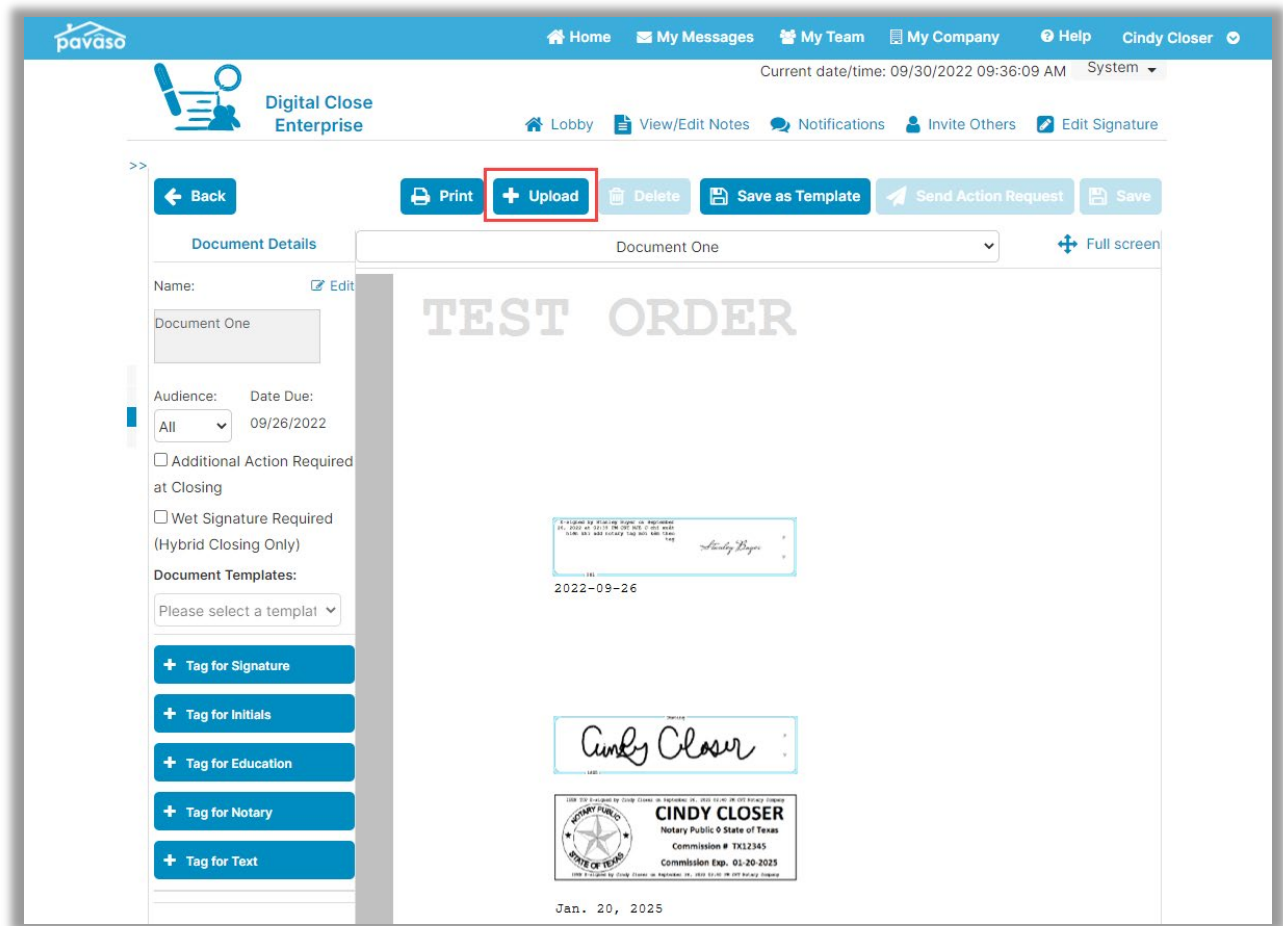
Once the order is closed, the **TrailFix** button will appear for the Closing Agent. In this example, **Document One** was uploaded to the order prior to the order being closed.



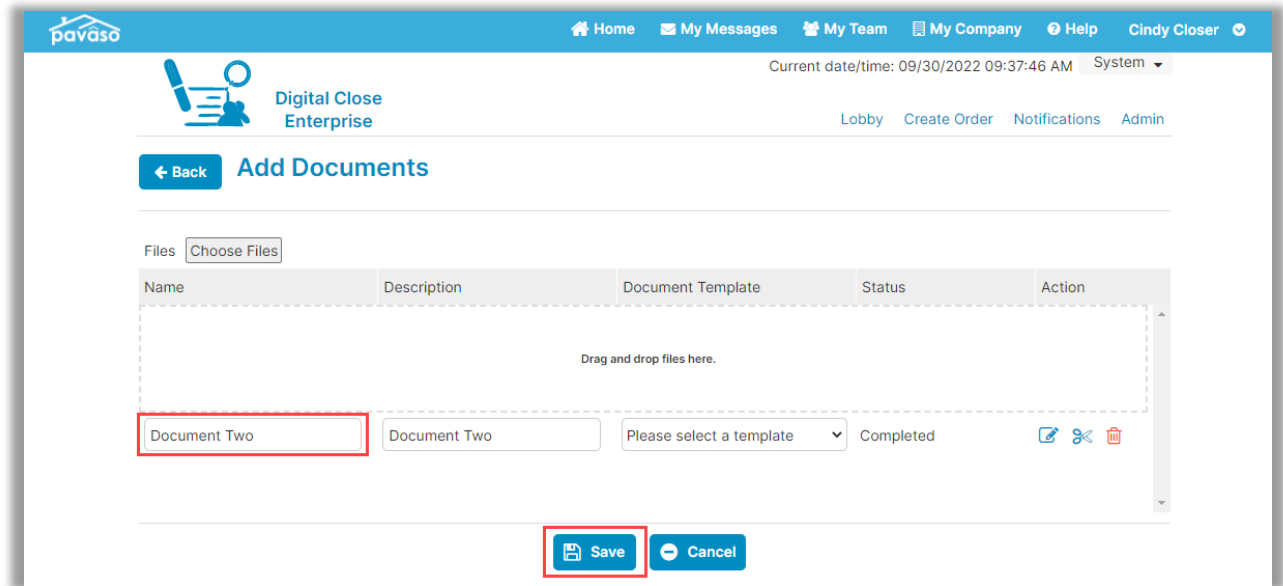
Enter a reason for modifying the package and select **Submit**.



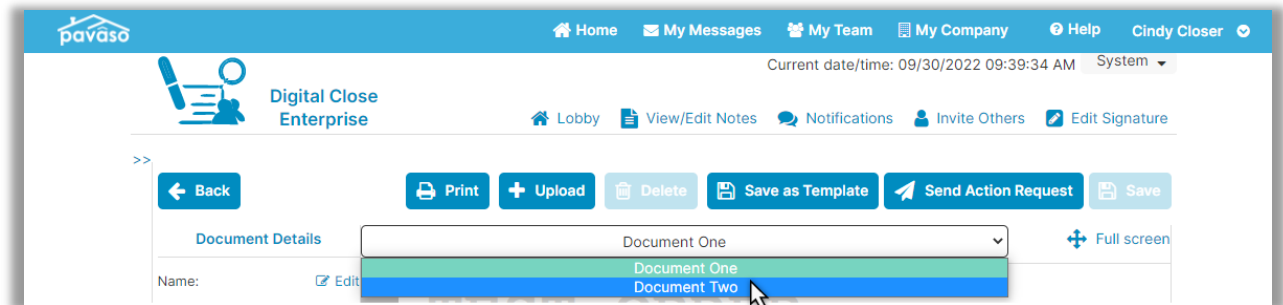
Once hitting **Submit**, you will be directed to Edit Mode. Select **Upload**.



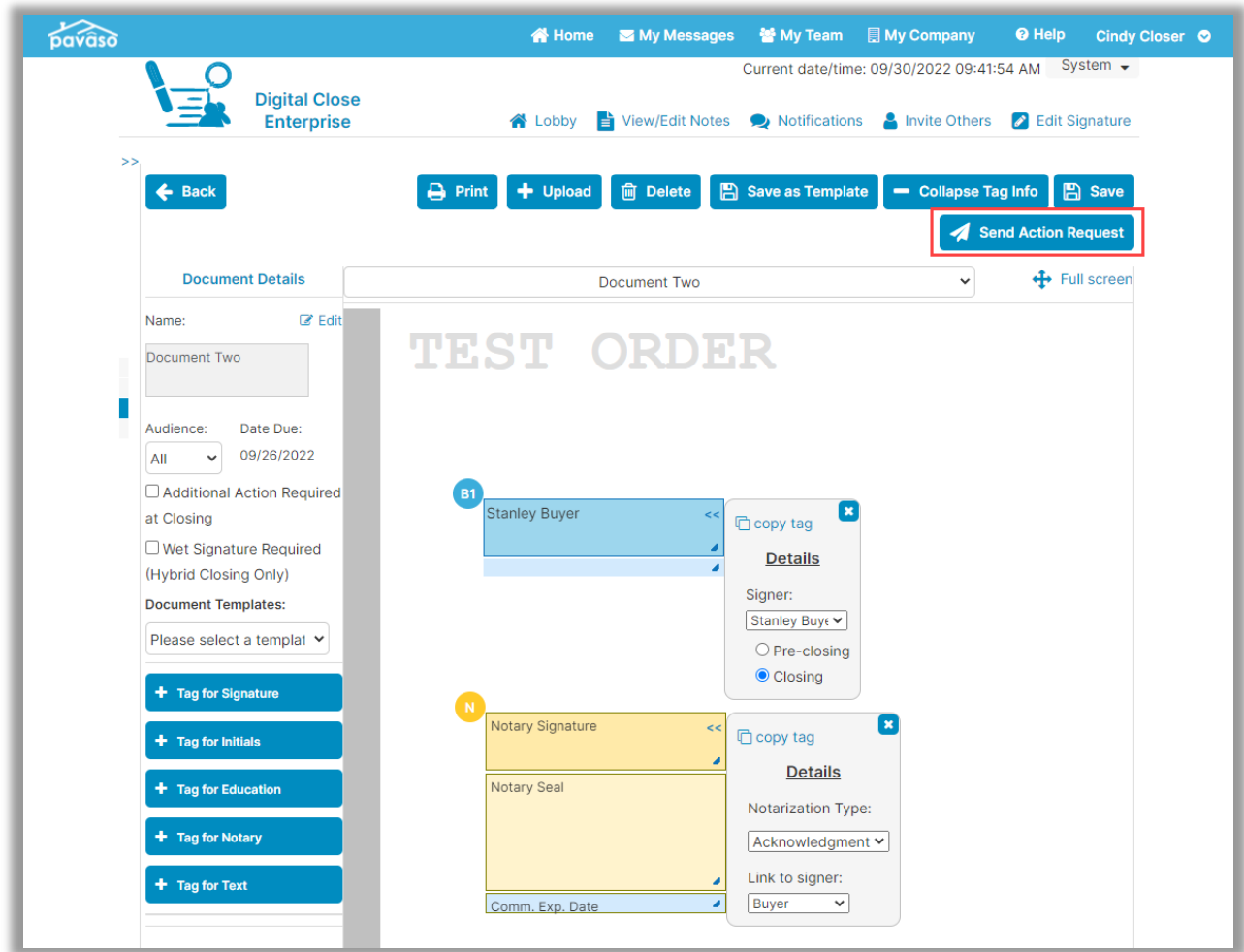
Upload the document(s) to be sent to the Signer and select **Save**. In this example, we'll call the document **Document Two**. Templates can be applied to documents if applicable.



Select the new document from the dropdown.



Add the appropriate tags to be completed by the Signer. Once the appropriate tags or templates have been applied, select **Send Action Request**.



A prompt appears to choose which method will be used to sign the document.

Important Note:

This example contains a document that requires eNotarization. Because of this, the option for the Signer to sign on their own device is not available. The document must be completed using IPEN or RON.

The following fields must be completed before the document can be sent:

- A. Closing Type:** In this example, we can choose IPEN or RON, since our document contains eNotarization. For documents that do not require eNotarization, the Signer can sign the document on their own advice.
- B. Notes to Recipient:** The Closing Agent can enter a note to the Signer. This note is visible in the email sent that notifies the Signer that there are additional actions to complete.
- C. Date:** The date that the document will be signed in person with the Closing Agent should be entered here.
- D. Time:** The time of the document signing appointment should be entered here.
- E. Cancel:** Selecting Cancel closes this window.
- F. Confirm:** Selecting Confirm saves the changes and sends the notification to the Signer.

Select Closing Type and Time

Closing Type (*) **A**

IPEN - Complete required task(s) with Signers present using a shared device

RON - Complete required task(s) remotely (minimum system requirements must be met)

Notes to Recipient (*) **B**

We will meet in our office to complete this document. Please call me at 555-5555 with any questions.

Date (*) **C**

08/23/2022

Time (*) **D**

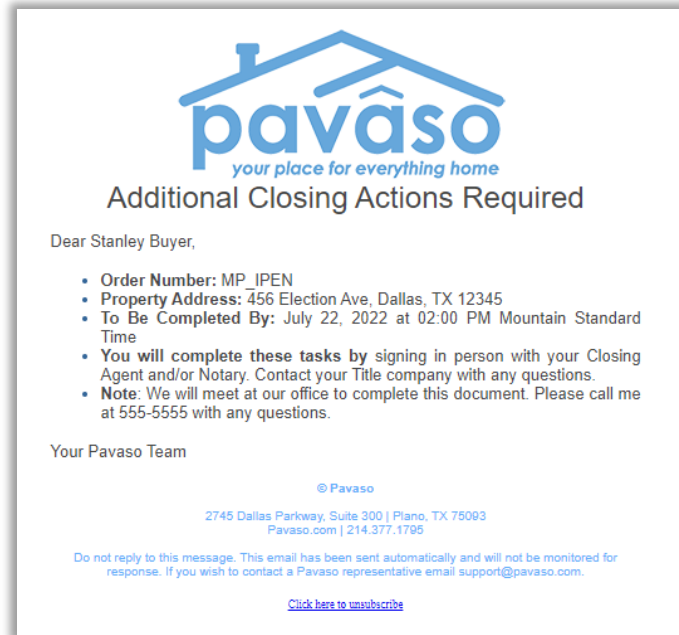
02:00 PM

E **F**

Cancel Confirm

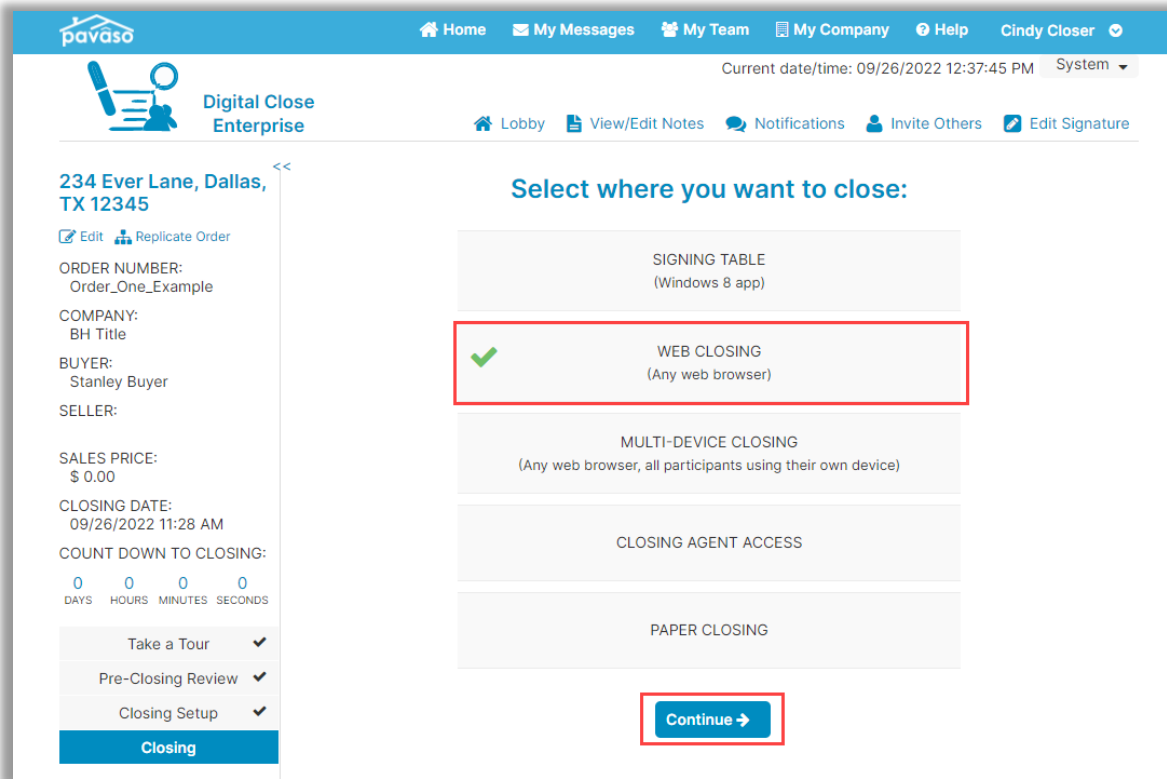
IPEN – Signer View

The Signer receives notification that additional actions are required for the closing. There will not be any actions required for them to take on Pavaso because they will be meeting with the Notary in person.



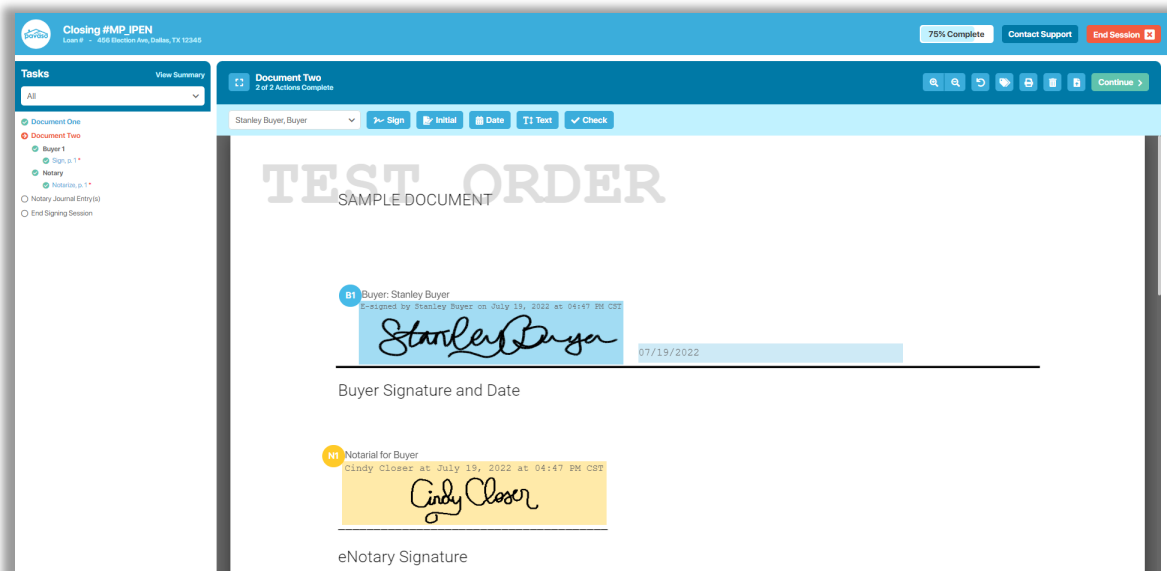
IPEN – Closing Agent View – Completing the Document

At the scheduled time, the Closing Agent access the order. Web Closing or Multi-Device Closing (MDC) can be used to conduct the signing. In this example, we'll choose **Web Closing**.



The Closing Agent completes the document with the Signer present and completes the closing.

Note: This example shows 2.0, but TrailFix is also available for 1.0.



Once the order has closed, Document Two now appears in the document list from the Post-Closing screen.


The screenshot shows the 'Digital Close Enterprise' interface. The top navigation bar includes 'Home', 'My Messages', 'My Team', 'My Company', 'Help', and 'Cindy Closer'. The current date/time is 09/30/2022 10:04:01 AM. The address '234 Ever Lane, Dallas, TX 12345' is displayed. A sidebar on the left contains order details: ORDER NUMBER: Order_One_Example, COMPANY: BH Title, BUYER: Stanley Buyer, SELLER: (blank), SALES PRICE: \$ 0.00, CLOSING DATE: 09/30/2022 11:28 AM, and ACTUAL CLOSING COMPLETED: 09/30/2022 11:28 AM. A 'Post Closing' button is at the bottom of the sidebar. The main content area is titled 'Documents' and contains the text: 'The documents listed below are the signed copies of your closing package.' Below this is a table with columns for document name, date, and actions.

	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	
Complete Package		
Bundle of all Documents	N/A	
Order Documents		
Document One	09/30/2022	
Document Two	09/30/2022	
Additional Order Documents		
Add Documents		
Journal Entries		
Journal Entries	09/30/2022	

The actions are also captured in the Audit Log.

TEST ORDER

Order Audit Log



Digital Close Order #: Order_One_Example
Property Address: 234 Ever Lane Dallas, TX 12345
Settlement Agent: BH Title - Cindy Closer
Borrower(s): Stanley Buyer
Report Generated Date: September 30, 2022 12:03:17 PM
Central Daylight Time

User	Action	Platform	IP Address	Date
Cindy Closer	Closed Order	Digital Close Enterprise	68.230.42.174	09/30/2022 12:03 PM
Cindy Closer	Cindy Closer notarized Document Two	Digital Close Enterprise	68.230.42.174	09/30/2022 12:02 PM
Stanley Buyer	Buyer Stanley Buyer signed in document Document Two	Digital Close Consumer	68.230.42.174	09/30/2022 12:02 PM
Cindy Closer	Accepted the Remote Online Notary Disclaimer	Digital Close Enterprise	68.230.42.174	09/30/2022 12:00 PM

Legal Compliance Disclaimer:

Pavaso does not warrant or represent that the documents signed or notarized using the Software comply with federal, state or county laws, rules, or regulations relating to the execution, notarization, or recordation of documents, including, without limitation, whether such documents are properly notarized or can be electronically recorded in the applicable county recorder offices. Pavaso shall have no obligation to confirm whether such documents, or the execution or notarization thereof, comply with any applicable federal, state or county laws, rules, or regulations (including, without limitation those concerning the commission, appointment or duties of a notary public), and such obligation shall be solely that of Licensee.

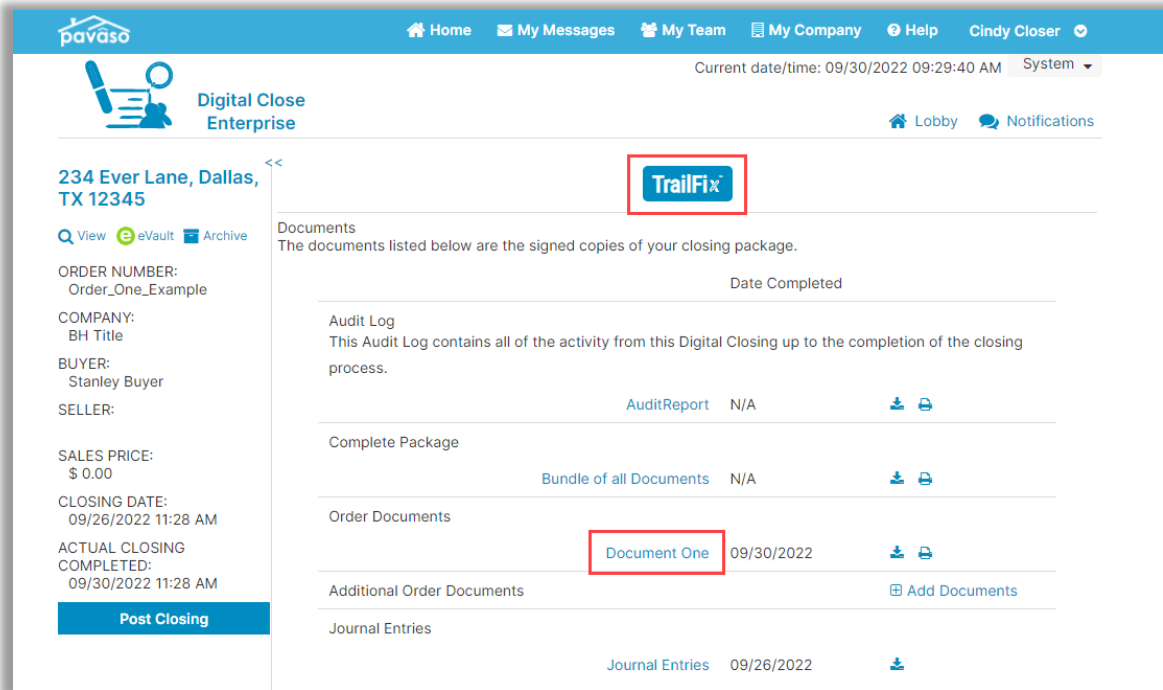
Cindy Closer	Change ClosingDate	Digital Close Enterprise	68.230.42.174	09/30/2022 11:53 AM
Cindy Closer	Edit Order	Digital Close Enterprise	68.230.42.174	09/30/2022 11:53 AM
Cindy Closer	Configure Document: "Document Two"	Digital Close Enterprise	68.230.42.174	09/30/2022 11:45 AM
Cindy Closer	Upload Document: "Document Two"	Digital Close Enterprise	68.230.42.174	09/30/2022 11:39 AM
Cindy Closer	Package reopened for modification because Need additional signature	Digital Close Enterprise	68.230.42.174	09/30/2022 11:35 AM
Cindy Closer	Closed Order	Digital Close Enterprise	68.230.42.174	09/30/2022 11:23 AM
Cindy Closer	The previous Seal with key 05a66bfb-	Digital Close Enterprise	68.230.42.174	09/30/2022 11:23 AM

Sending a Document Using Remote Online Notarization (RON)

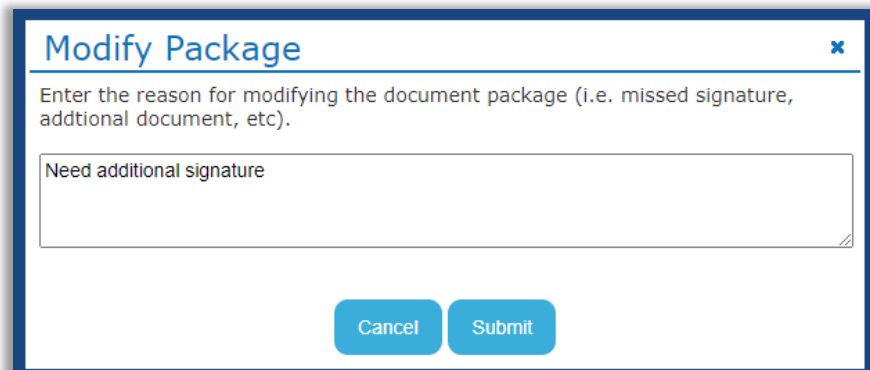
RON – Closing Agent View

Note: This guide refers to Closing Agent. This is intended to be inclusive of anyone with the Closing Agent role type.

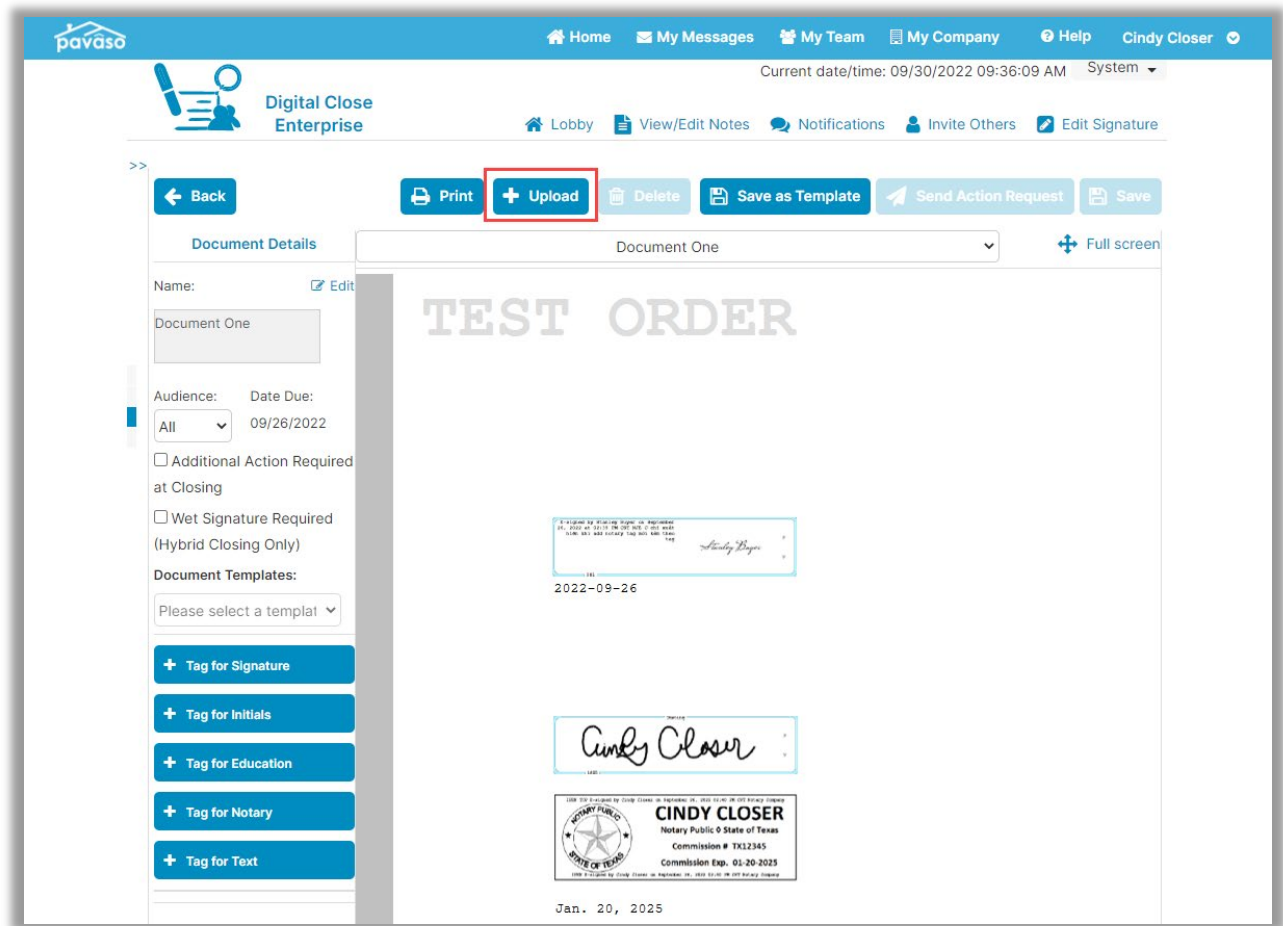
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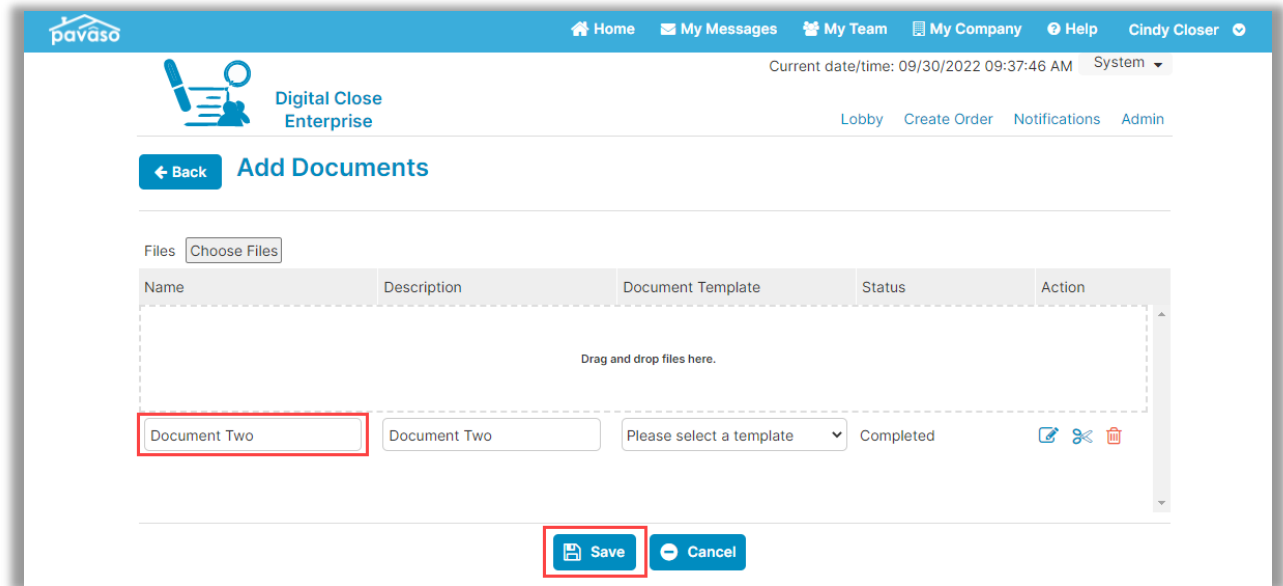
The user must enter a reason for modifying the package.



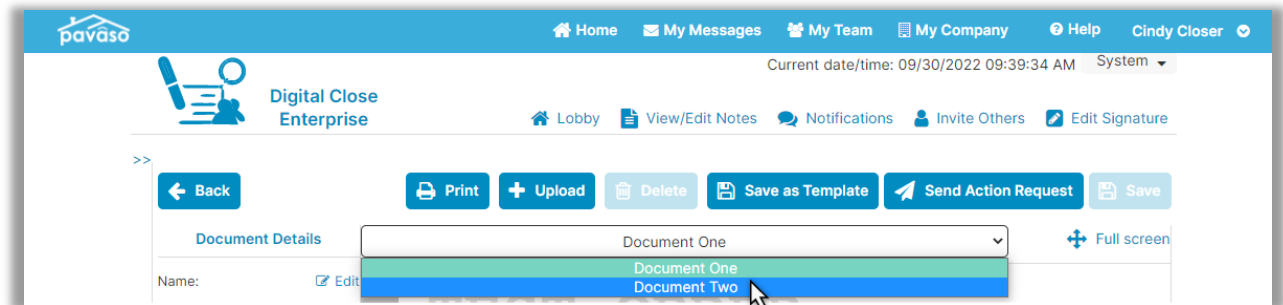
Once hitting **Submit**, you will be directed to Edit Mode. Select **Upload**.



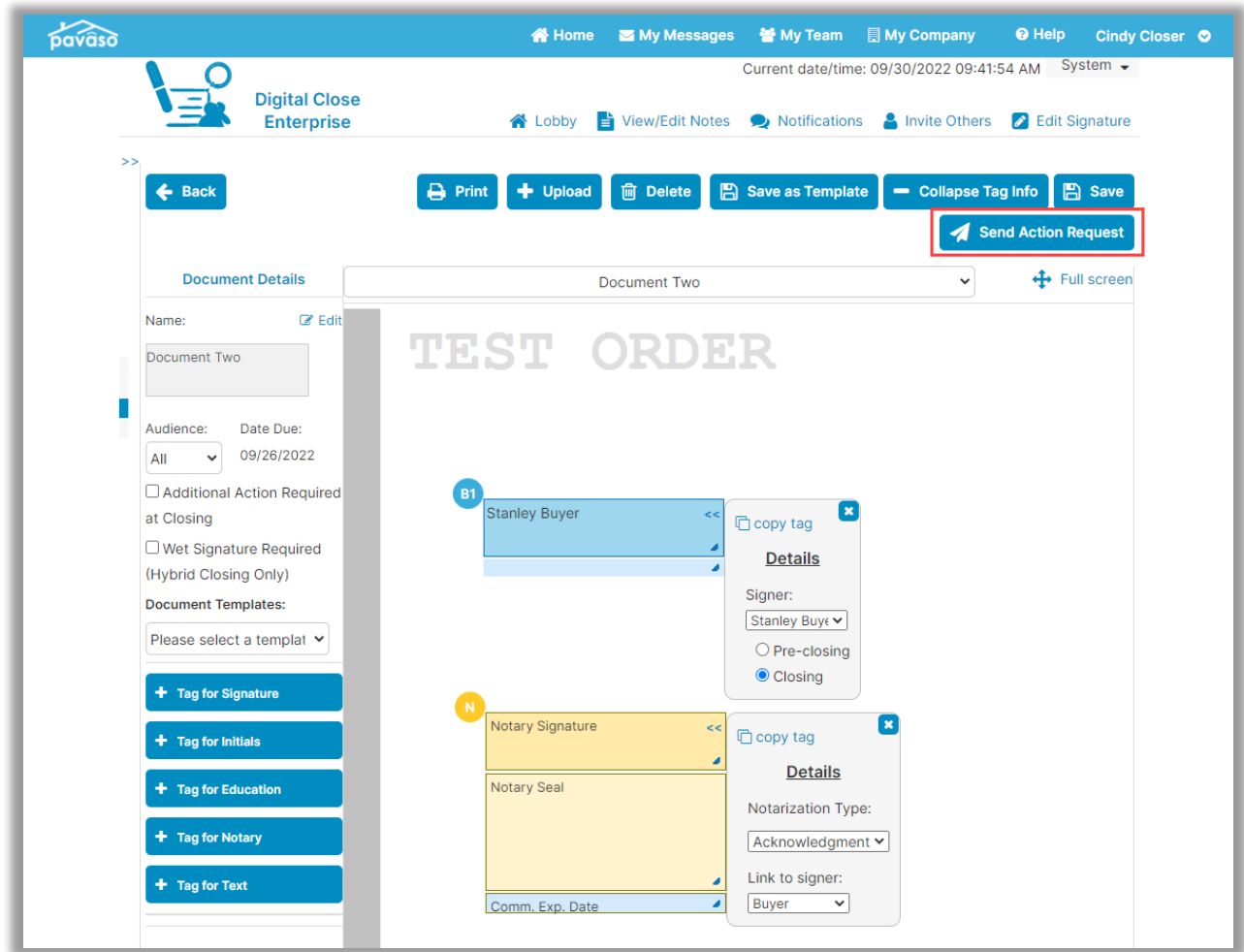
Upload the document(s) to be sent to the Signer and select **Save**. In this example, we'll call the document **Document Two**. Templates can be applied to documents if applicable.



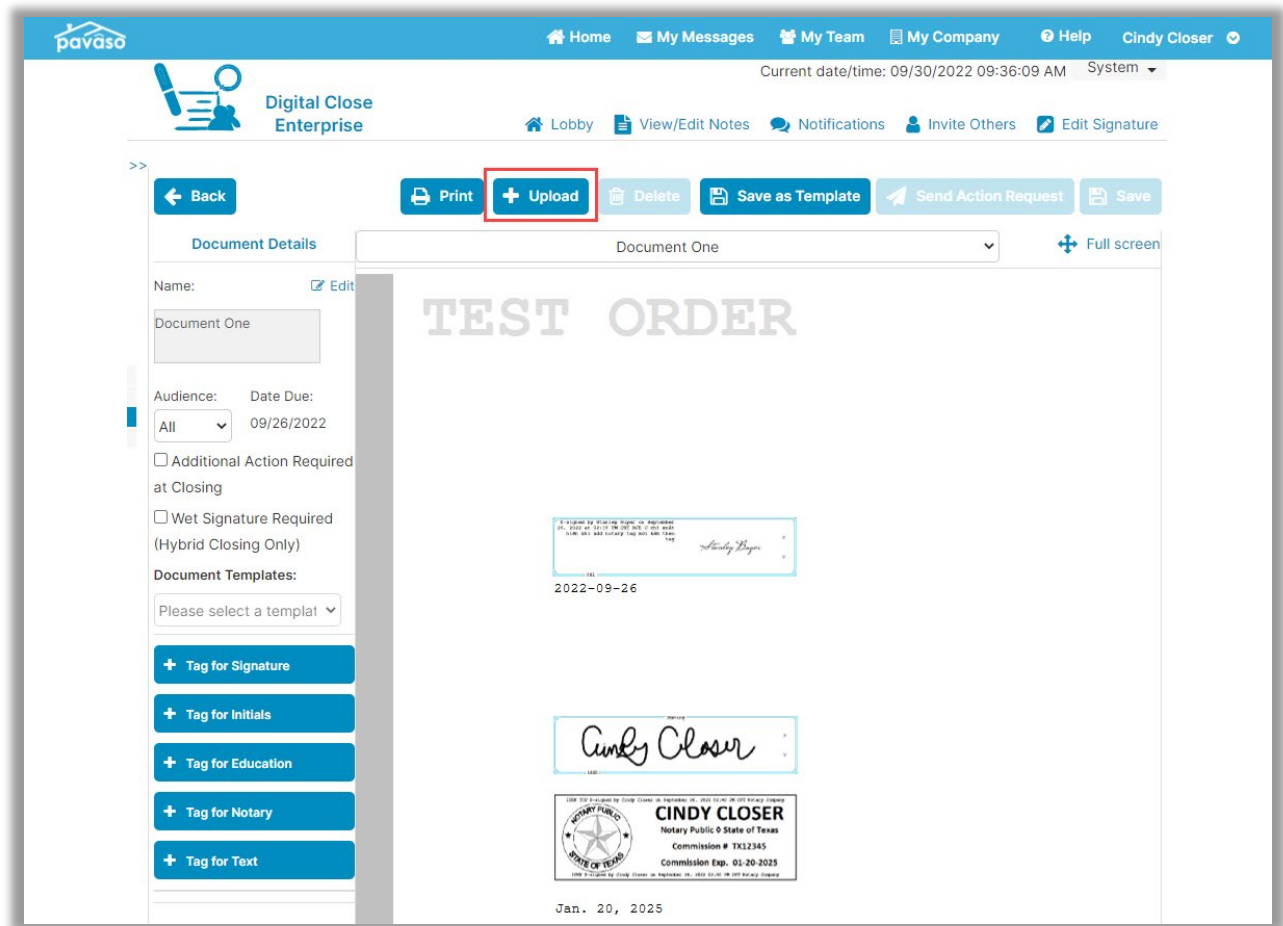
Select the new document from the dropdown.



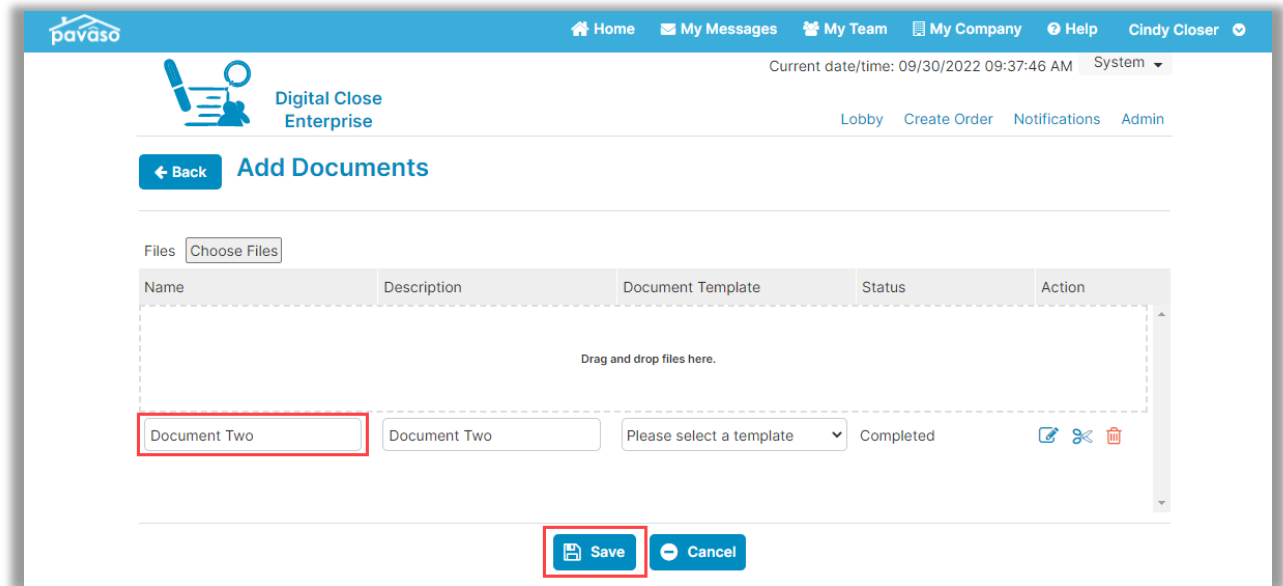
Add the appropriate tags to be completed by the Signer. Once the appropriate tags or templates have been applied, select **Send Action Request**.



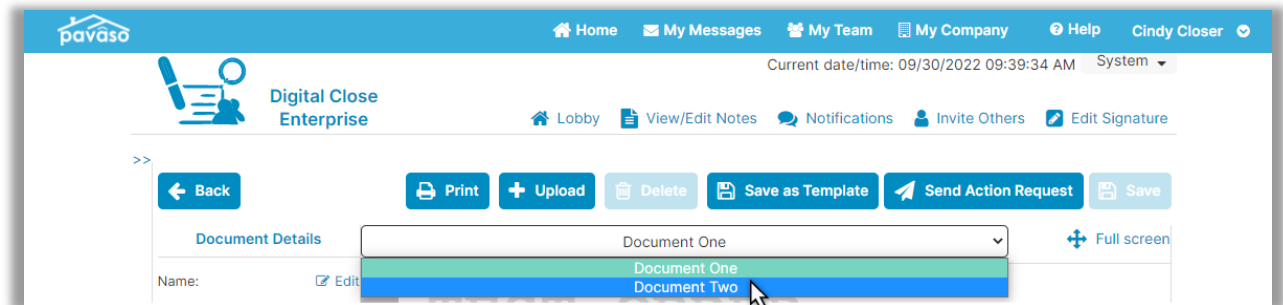
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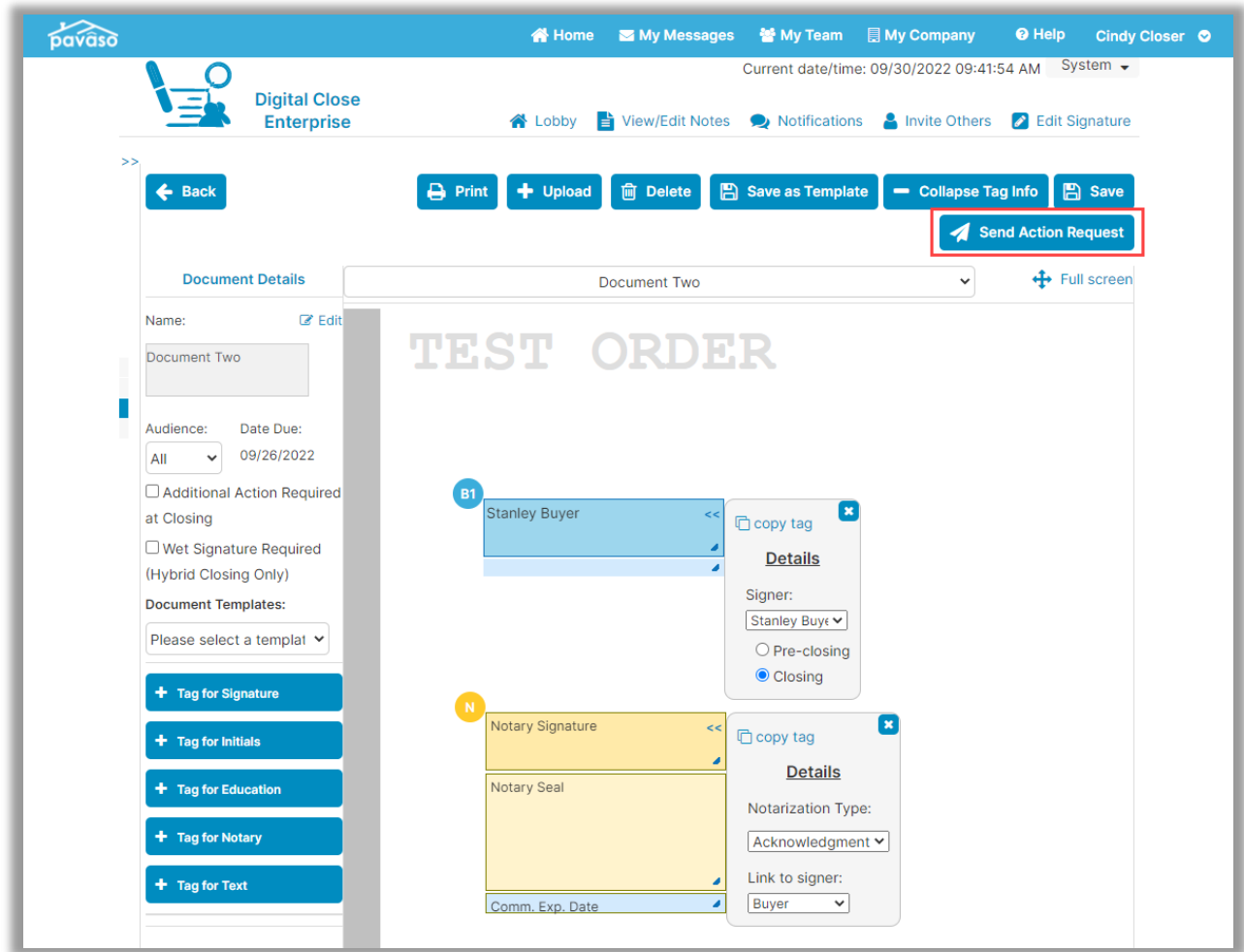
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Select the new document from the dropdown.



Add the appropriate tags to be completed by the Signer. Once the appropriate tags or templates have been applied, select **Send Action Request**.



A prompt appears to choose which method will be used to sign the document.

Important Note:

This example contains a document that requires eNotarization. Because of this, the option for the Signer to sign on their own device is not available. The document must be completed using IPEN or RON.

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- B. Notes to Recipient:** The Closing Agent can enter a note to the Signer. This note is visible in the email sent that notifies the Signer that there are additional actions to complete.
- C. Date:** The date that the document will be signed in person with the Closing Agent should be entered here.
- D. Time:** The time of the document signing appointment should be entered here.
- E. Cancel:** Selecting Cancel closes this window.
- F. Confirm:** Selecting Confirm saves the changes and sends the notification to the Signer.

Select Closing Type and Time ✕

Closing Type (*): **A**

IPEN - Complete required task(s) with Signers present using a shared device

RON - Complete required task(s) remotely (minimum system requirements must be met)

Notes to Recipient (*): **B**

We'll meet virtually to complete this document.

Date (*): **C**

09/30/2022

Time (*): **D**

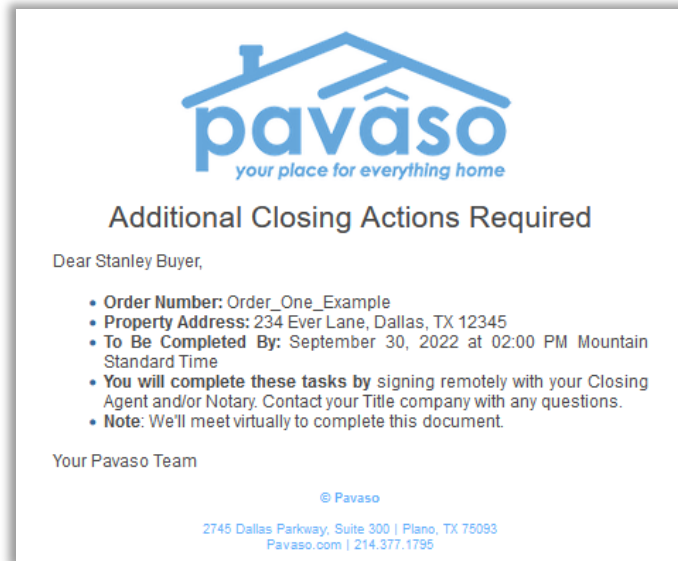
02:00 PM

E **F**

Cancel Confirm

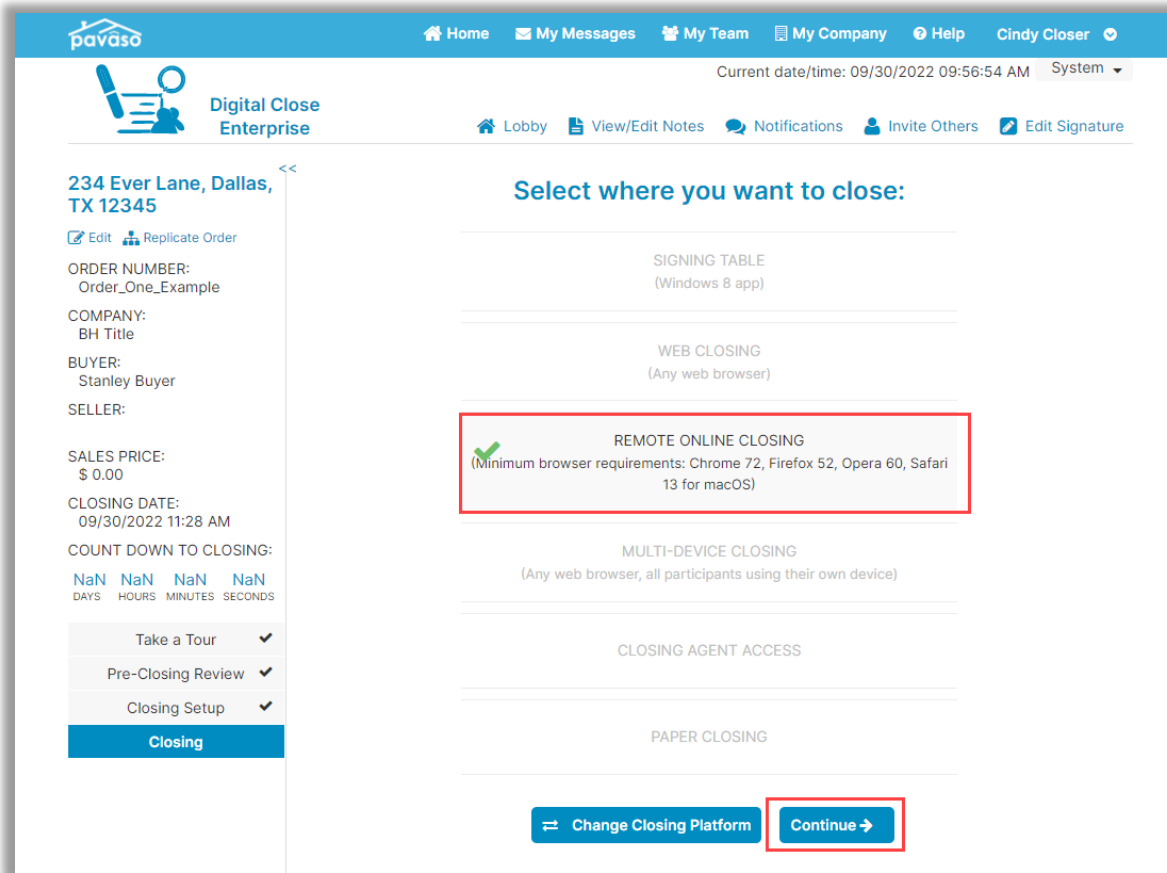
RON – Signer View

The Signer receives notification that additional actions are required for the closing. There will not be any actions required for them to take on Pavaso because they will be meeting with the Notary virtually via RON.

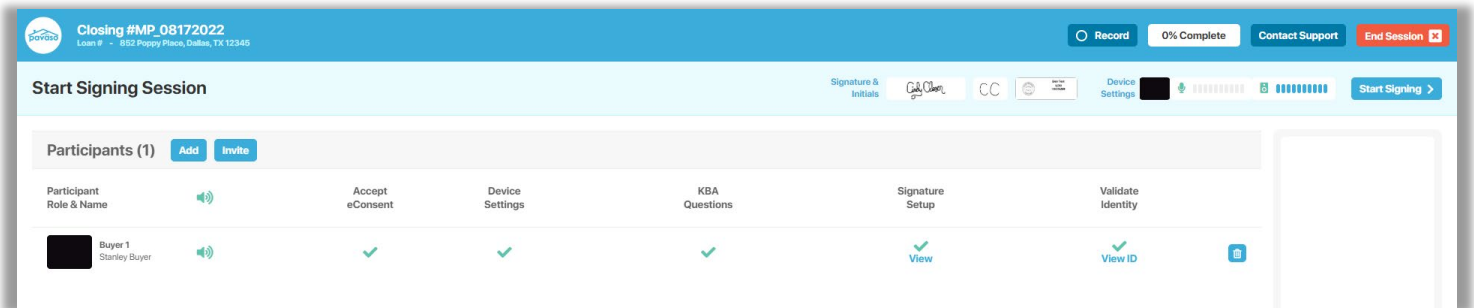


RON – Closing Agent View – Completing the Document

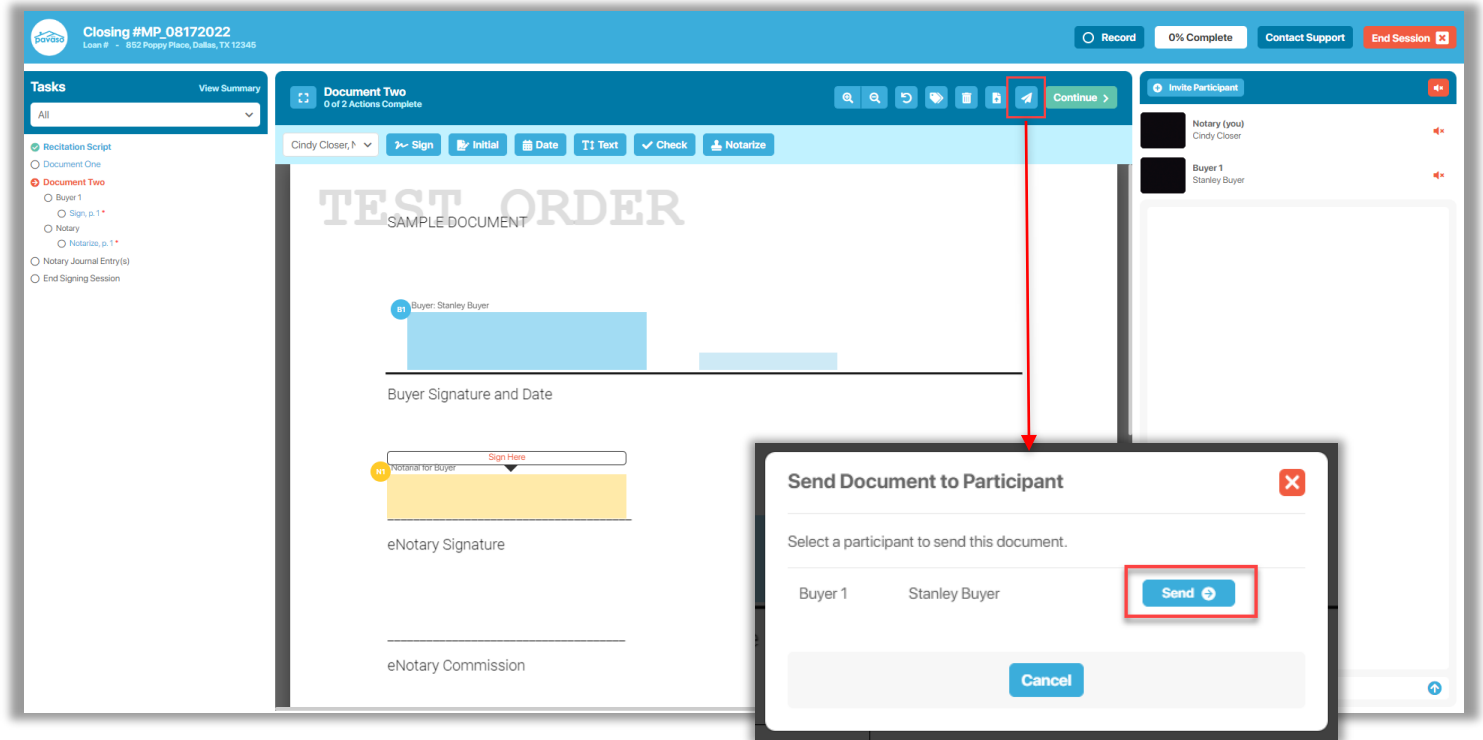
At the scheduled time, access the order and select **Remote Online Closing**.



All RON requirements must be met to complete the document using RON. This includes KBA questions and ID validation. If the Skip option is enabled for your company, these options are available.



From within the session, the document is completed by sending the document to the Signer.



Once the document is completed by the Signer, eNotarization can be completed. Select **Continue** to save the document and proceed.

Closing #MP_08172022
Loan # - 6522 Poppy Place, Dallas, TX 12345

Record 75% Complete Contact Support End Session

Tasks View Summary
All

Document Two
2 of 2 Actions Complete

Cindy Closer, Notary

Buyer: Stanley Buyer
Designed by Stanley Buyer on August 17, 2022 at 04:48 PM CST

Stanley Buyer
08/17/2022

Buyer Signature and Date

Notarial for Buyer
Cindy Closer at August 17, 2022 at 04:48 PM CST

Cindy Closer

eNotary Signature

Lien Test
1/20
TX473289

Notary Commission

Jan. 20, 2025

eNotary Expiration

Invite Participant
Notary (you) Cindy Closer
Buyer 1 Stanley Buyer

Type chat message here...

The eNotary journal will display to record the notarial act for this new document. Complete the journal and select **Continue** to save and proceed.

Closing #Order_One_Example
Loan # - 224 Ever Lane, Dallas, TX 12345

Record 67% Complete Contact Support End Session

Tasks View Summary
All

Entry 1 (Buyer 1)
Stanley Buyer

Opt Out of Journal Continue

Date of Notarization
September 26, 2022
September 30, 2022

Description/title of document(s)
Mortgage Documents

Document Date
09/26/2022
09/30/2022

Type of notarial act
Acknowledgement

+ Add notarial act

Name of Signer
Stanley Buyer

Address of Signer
123 Right Road, Plano, TX, 12345

Signature of Signer
Stanley Buyer

Invite Participant
Notary (you) Cindy Closer
Buyer 1 Stanley Buyer

Once complete, the document will display on the Post-Closing screen in the document list.


The screenshot displays the Pavaso Digital Close Enterprise interface. The top navigation bar includes 'Home', 'My Messages', 'My Team', 'My Company', 'Help', and 'Cindy Closer'. The current date/time is 09/30/2022 10:04:01 AM. The interface shows a document list for '234 Ever Lane, Dallas, TX 12345'. The list includes an Audit Log, Complete Package, Order Documents (Document One and Document Two), Additional Order Documents, and Journal Entries. Document Two is highlighted with a red box.

Document Name	Date Completed	Download	Print
Audit Log			
AuditReport	N/A		
Complete Package			
Bundle of all Documents	N/A		
Order Documents			
Document One	09/30/2022		
Document Two	09/30/2022		
Additional Order Documents			Add Documents
Journal Entries			
Journal Entries	09/30/2022		

The actions are also captured in the Audit Log.

TEST ORDER

Order Audit Log



Digital Close Order #: Order_One_Example
Property Address: 234 Ever Lane Dallas, TX 12345
Settlement Agent: BH Title - Cindy Closer
Borrower(s): Stanley Buyer
Report Generated Date: September 30, 2022 12:03:17 PM
Central Daylight Time

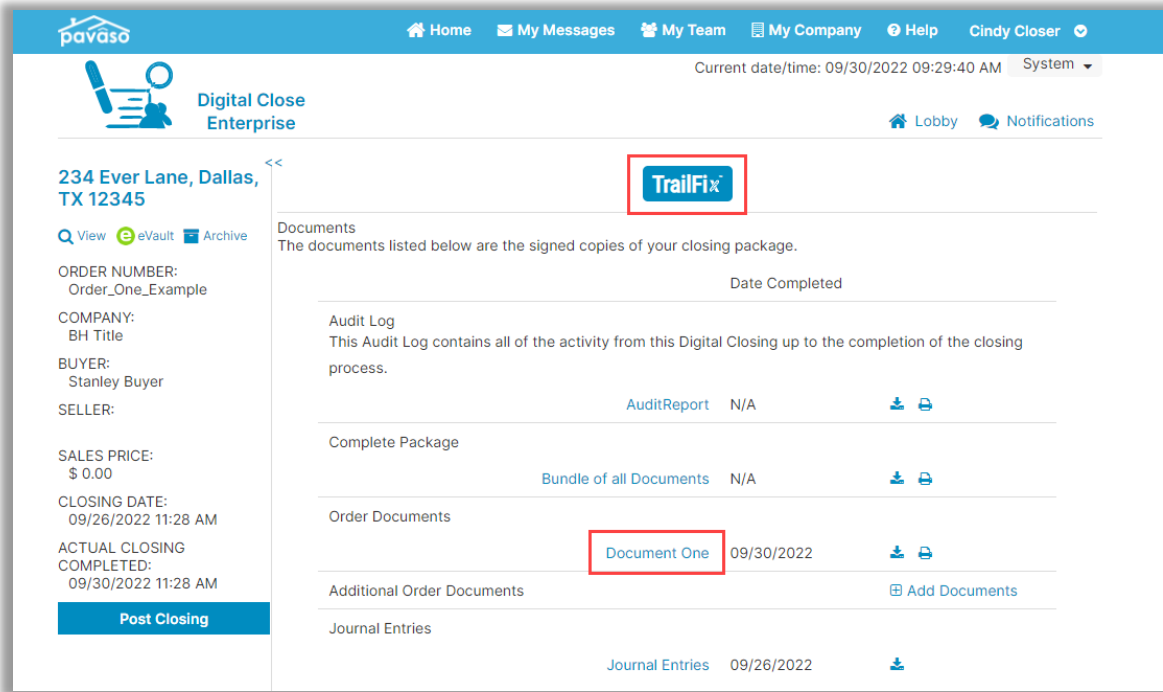
User	Action	Platform	IP Address	Date
Cindy Closer	Closed Order	Digital Close Enterprise	68.230.42.174	09/30/2022 12:03 PM
Cindy Closer	Cindy Closer notarized Document Two	Digital Close Enterprise	68.230.42.174	09/30/2022 12:02 PM
Stanley Buyer	Buyer Stanley Buyer signed in document Document Two	Digital Close Consumer	68.230.42.174	09/30/2022 12:02 PM
Cindy Closer	Accepted the Remote Online Notary Disclaimer	Digital Close Enterprise	68.230.42.174	09/30/2022 12:00 PM
<p>Legal Compliance Disclaimer:</p> <p>Pavaso does not warrant or represent that the documents signed or notarized using the Software comply with federal, state or county laws, rules, or regulations relating to the execution, notarization, or recordation of documents, including, without limitation, whether such documents are properly notarized or can be electronically recorded in the applicable county recorder offices. Pavaso shall have no obligation to confirm whether such documents, or the execution or notarization thereof, comply with any applicable federal, state or county laws, rules, or regulations (including, without limitation those concerning the commission, appointment or duties of a notary public), and such obligation shall be solely that of Licensee.</p>				
Cindy Closer	Change ClosingDate	Digital Close Enterprise	68.230.42.174	09/30/2022 11:53 AM
Cindy Closer	Edit Order	Digital Close Enterprise	68.230.42.174	09/30/2022 11:53 AM
Cindy Closer	Configure Document: "Document Two"	Digital Close Enterprise	68.230.42.174	09/30/2022 11:45 AM
Cindy Closer	Upload Document: "Document Two"	Digital Close Enterprise	68.230.42.174	09/30/2022 11:39 AM
Cindy Closer	Package reopened for modification because Need additional signature	Digital Close Enterprise	68.230.42.174	09/30/2022 11:35 AM
Cindy Closer	Closed Order	Digital Close Enterprise	68.230.42.174	09/30/2022 11:23 AM
Cindy Closer	The previous Seal with key 05a66bfb-	Digital Close Enterprise	68.230.42.174	09/30/2022 11:23 AM

Sending a Document Using Sign on Their Own

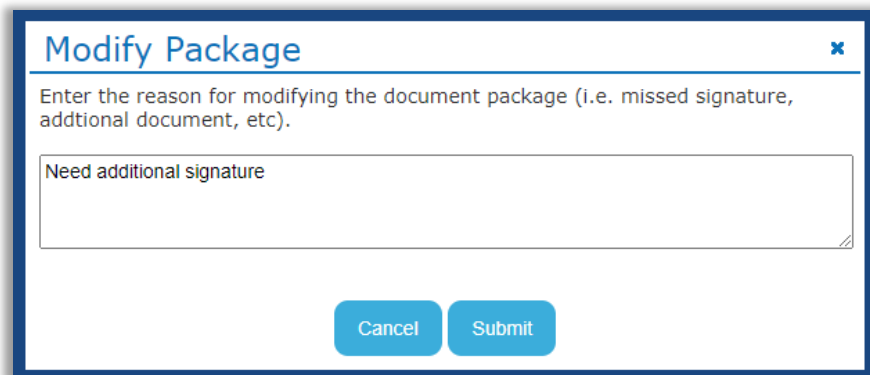
Sign On Their Own – Closing Agent View

Note: This guide refers to Closing Agent. This is intended to be inclusive of anyone with the Closing Agent role type.

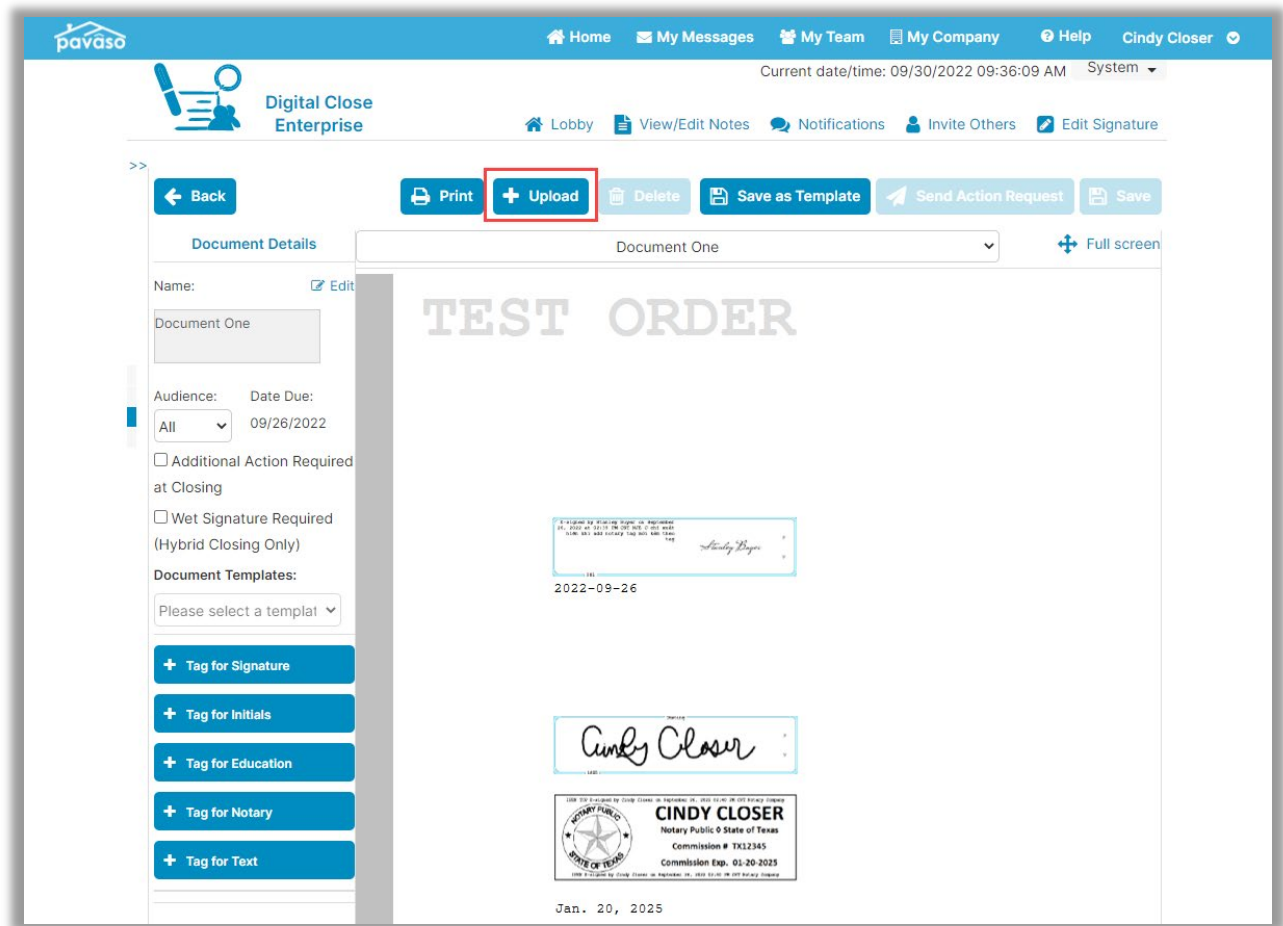
Once the order is closed, the **TrailFix** button will appear for the Closing Agent. In this example, **Document One** was uploaded to the order prior to the order being closed.



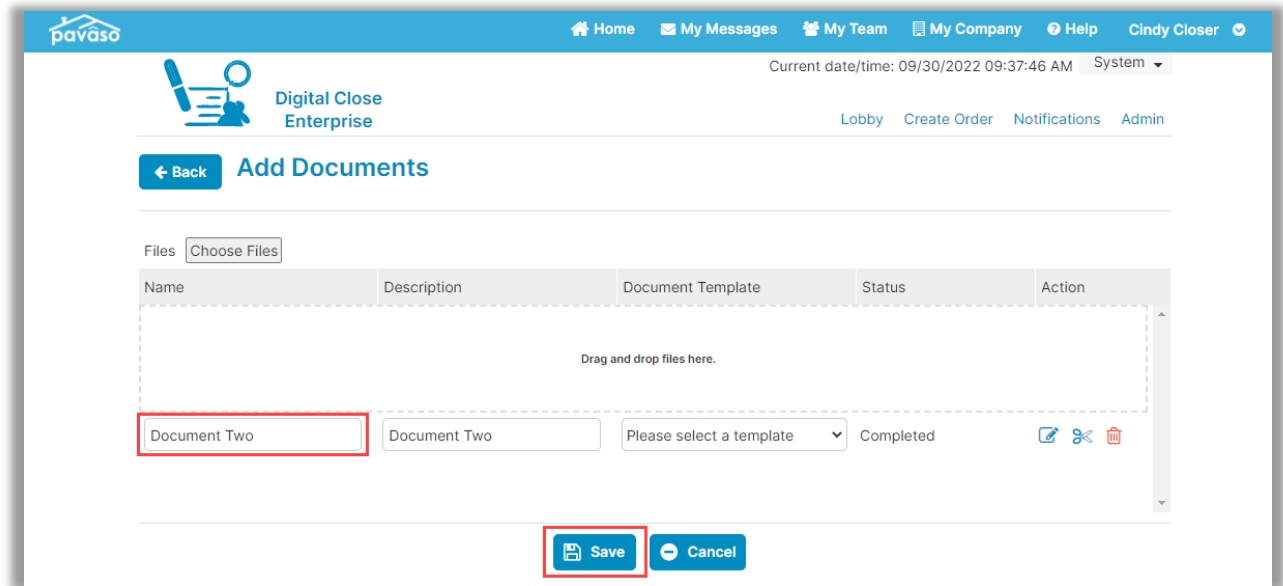
The user must enter a reason for modifying the package.



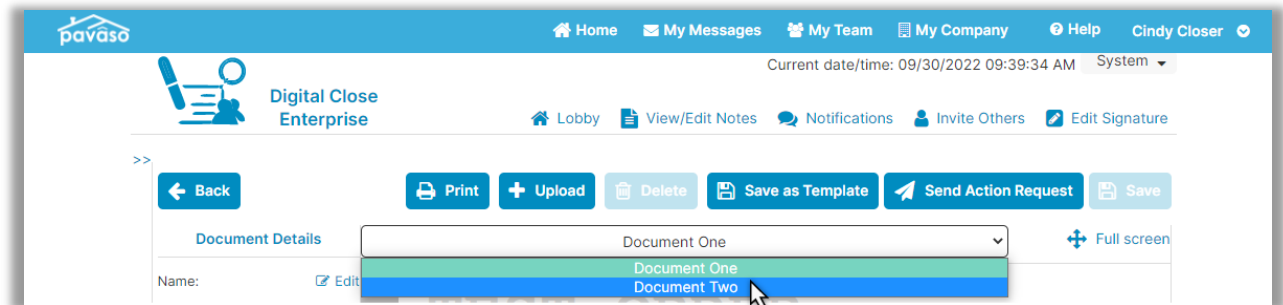
Once hitting **Submit**, you will be directed to Edit Mode. Select **Upload**.



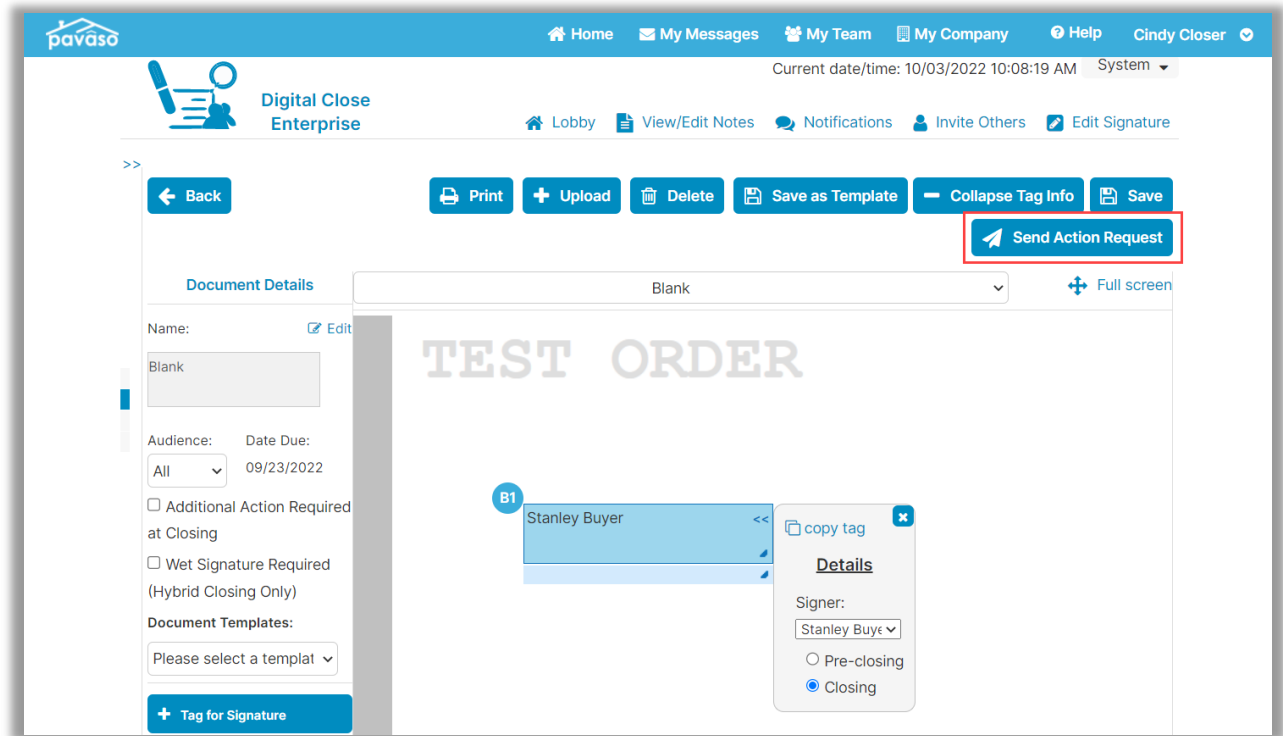
Upload the document(s) to be sent to the Signer and select **Save**. In this example, we'll call the document **Document Two**. Templates can be applied to documents if applicable.



Select the new document from the dropdown.



Add the appropriate tags to be completed by the Signer. Once the appropriate tags or templates have been applied, select **Send Action Request**.



A prompt appears to choose which method will be used to sign the document. In this example, we'll choose **Sign on their own**. This option allows the Signer to complete the document on their own device without the Notary present.

The following must be completed before the document can be sent:

- A. Closing Type:** In this example, Sign on their own can be used because the document does not require eNotarization. The Signer can complete their document on their own device without the Notary present.
- B. Notes to Recipient:** The Closing Agent can enter a note to the Signer. This note is visible in the email sent that notifies the Signer that there are additional actions to complete.
- C. Cancel:** Selecting Cancel closes this window.
- D. Confirm:** Selecting Confirm saves the changes and sends the notification to the Signer.

Select Closing Type and Time ✕

Closing Type (*): **A**

- IPEN - Complete required task(s) with Signers present using a shared device
- RON - Complete required task(s) remotely (minimum system requirements must be met)
- Sign on their own - Send required task(s) to the Signer to complete on their own device (must be completed using a laptop, desktop, or tablet)

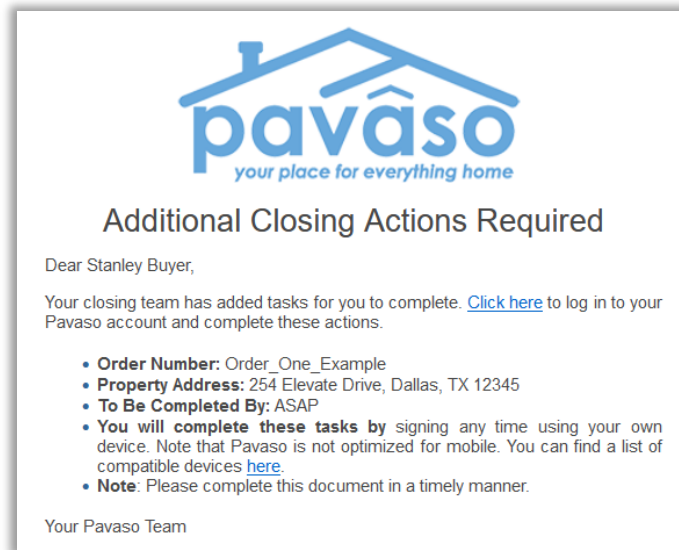
Notes to Recipient (*): **B**

Please complete this document in a timely manner.

C **D**

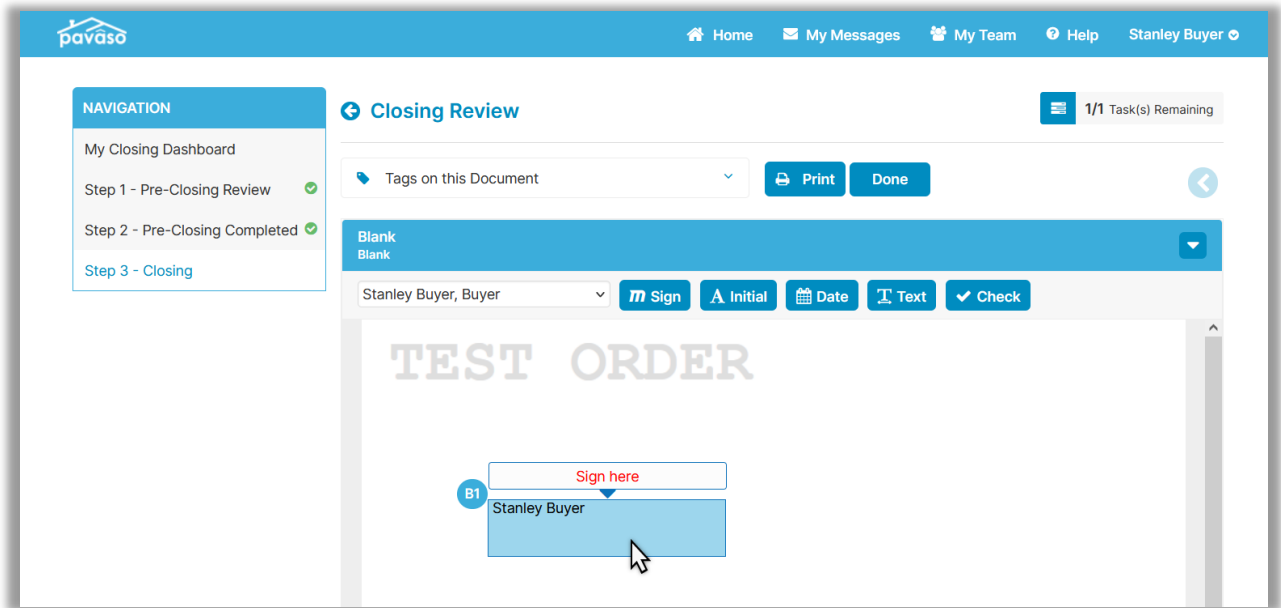
Sign On Their Own – Signer View

The Signer receives an email indicating they have pending actions to complete.

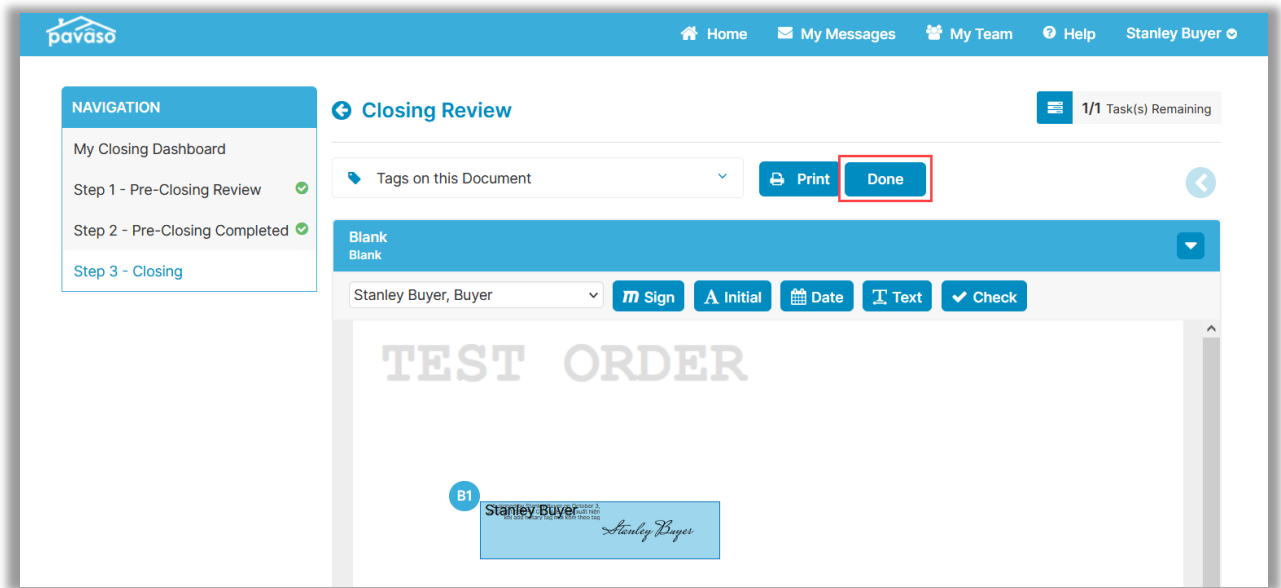


Selecting the **Click Here** link in the body of the email will direct them to Pavaso and directly to the document pending action. If they sign into their account on their own, they navigate to the appropriate order and document.

The Signer selects the signature tag to apply their signature. Since this Signer has already signed documents during their closing, the signature is saved to their profile.

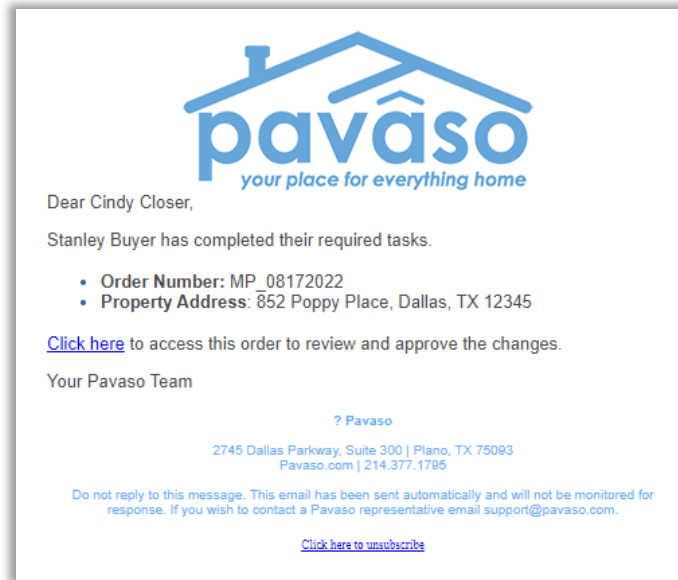


After the signature is complete, the Signer selects **Done**.

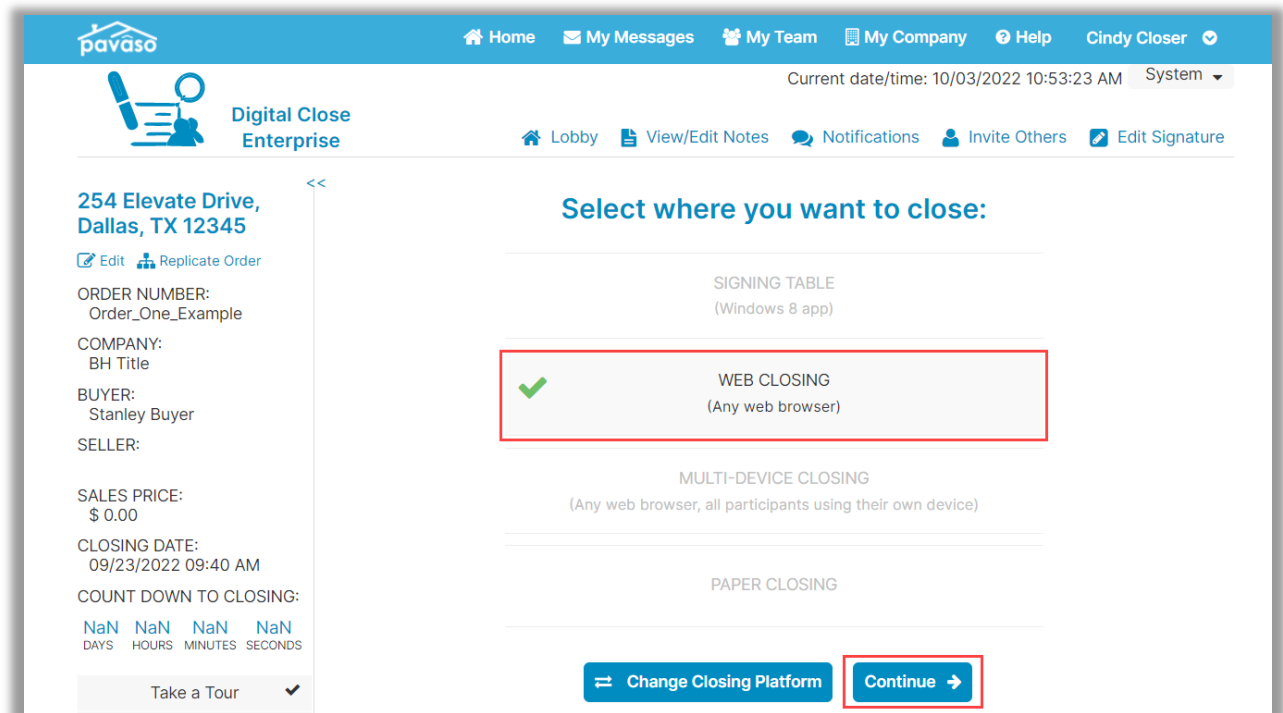


Sign On Their Own – Closing Agent View – Finalizing Modifications

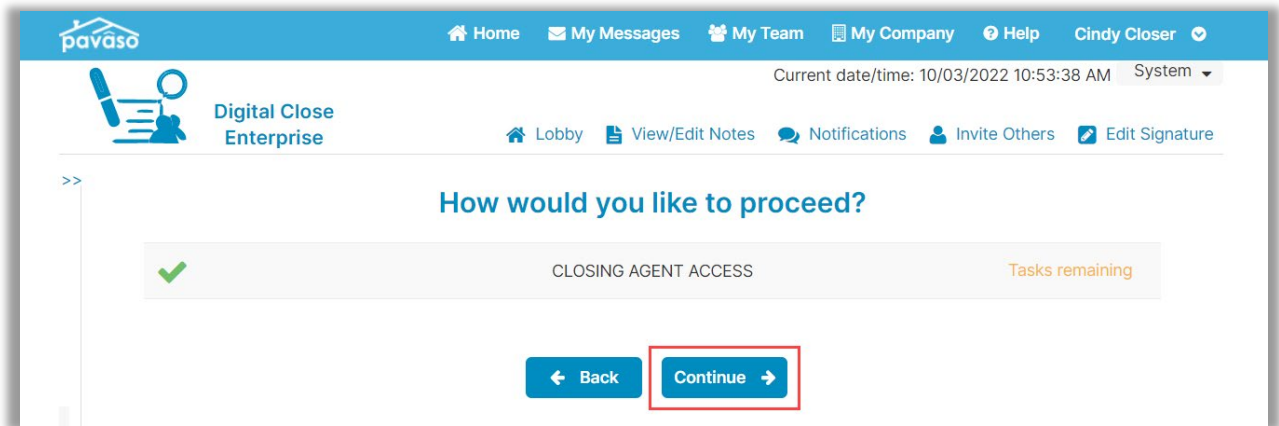
Once the Signer tasks are complete, the Closing Agent receives an email notification that the document is ready for review.



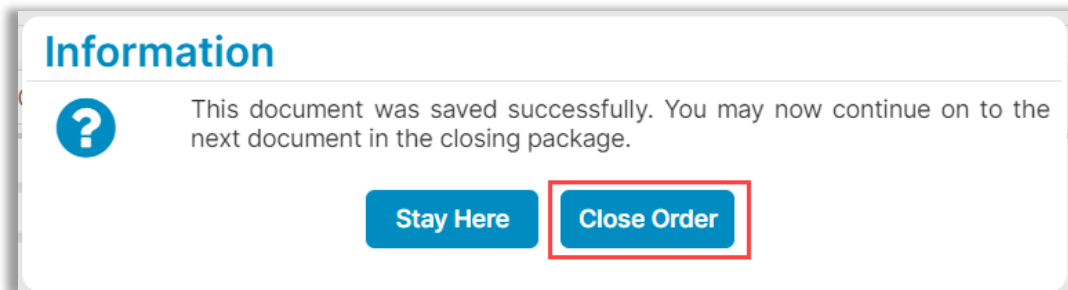
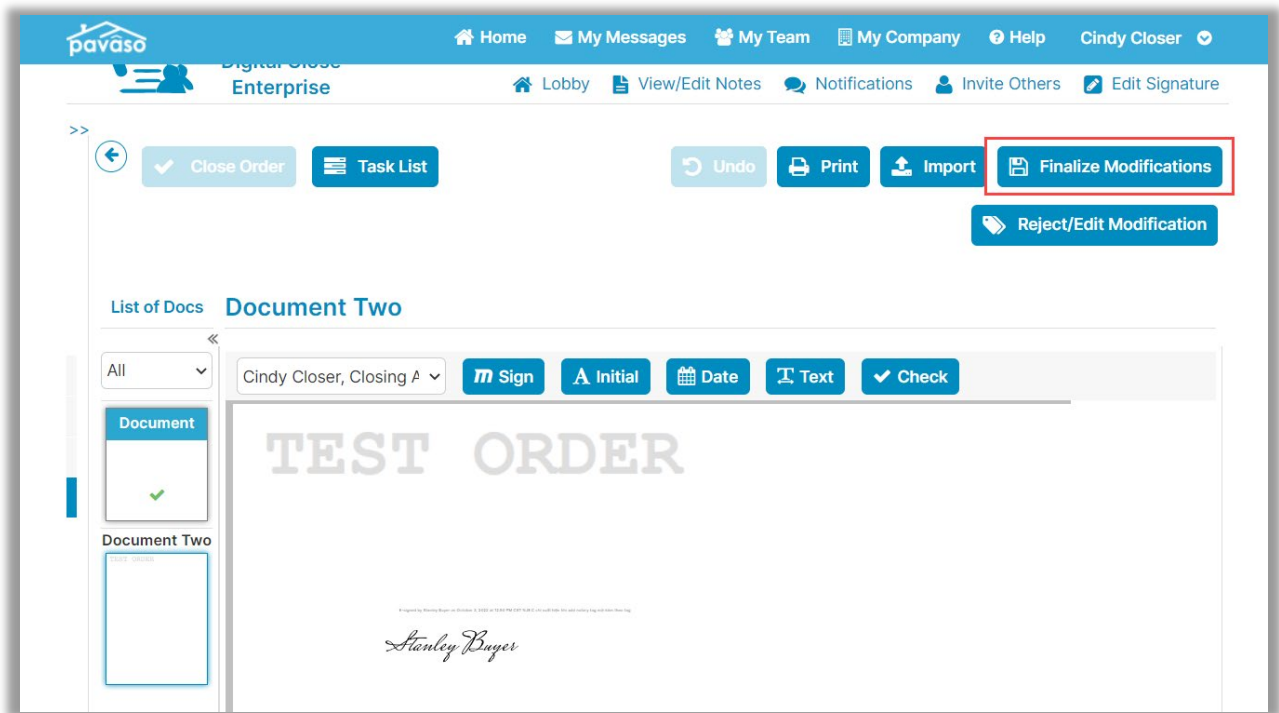
From within the order, choose **Web** Closing and **Continue**.



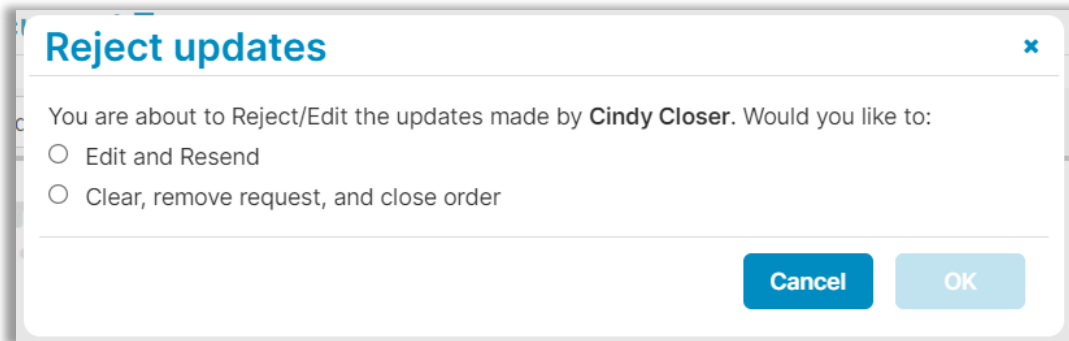
Select **Closing Agent Access** and **Continue**.



Select the document that requires review. If all is correct, select **Finalize Modifications**. Once selected, choose **Close Order**.



If a document needs to be re-sent, select **Reject/Edit Modification** and choose one of the options. Selecting **Edit and Resend** sends the document back to the Signer. Selecting **Clear, remove request, and close order** will remove this document and the modification from the order entirely.



Once complete, the document will display on the Post-Closing screen in the document list.


The screenshot displays the Pavaso Digital Close Enterprise interface. The top navigation bar includes 'Home', 'My Messages', 'My Team', 'My Company', 'Help', and 'Cindy Closer'. The current date/time is 09/30/2022 10:04:01 AM. The main header shows '234 Ever Lane, Dallas, TX 12345' and a 'TrailFix' logo. On the left, there are buttons for 'View', 'eVault', and 'Archive', along with order details: ORDER NUMBER: Order_One_Example, COMPANY: BH Title, BUYER: Stanley Buyer, SELLER: (blank), SALES PRICE: \$ 0.00, CLOSING DATE: 09/30/2022 11:28 AM, and ACTUAL CLOSING COMPLETED: 09/30/2022 11:28 AM. A 'Post Closing' button is at the bottom left. The main content area is titled 'Documents' and contains the text: 'The documents listed below are the signed copies of your closing package.' Below this is a table with columns for document name, date, and actions.

	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	
Complete Package		
Bundle of all Documents	N/A	
Order Documents		
Document One	09/30/2022	
Document Two	09/30/2022	
Additional Order Documents		Add Documents
Journal Entries		
Journal Entries	09/30/2022	

The actions are also captured in the Audit Log.

TEST ORDER

Order Audit Log



Digital Close Order #: Order_One_Example
Property Address: 234 Ever Lane Dallas, TX 12345
Settlement Agent: BH Title - Cindy Closer
Borrower(s): Stanley Buyer
Report Generated Date: September 30, 2022 12:03:17 PM
Central Daylight Time

User	Action	Platform	IP Address	Date
Cindy Closer	Closed Order	Digital Close Enterprise	68.230.42.174	09/30/2022 12:03 PM
Cindy Closer	Cindy Closer notarized Document Two	Digital Close Enterprise	68.230.42.174	09/30/2022 12:02 PM
Stanley Buyer	Buyer Stanley Buyer signed in document Document Two	Digital Close Consumer	68.230.42.174	09/30/2022 12:02 PM
Cindy Closer	Accepted the Remote Online Notary Disclaimer	Digital Close Enterprise	68.230.42.174	09/30/2022 12:00 PM
<p>Legal Compliance Disclaimer:</p> <p>Pavaso does not warrant or represent that the documents signed or notarized using the Software comply with federal, state or county laws, rules, or regulations relating to the execution, notarization, or recordation of documents, including, without limitation, whether such documents are properly notarized or can be electronically recorded in the applicable county recorder offices. Pavaso shall have no obligation to confirm whether such documents, or the execution or notarization thereof, comply with any applicable federal, state or county laws, rules, or regulations (including, without limitation those concerning the commission, appointment or duties of a notary public), and such obligation shall be solely that of Licensee.</p>				
Cindy Closer	Change ClosingDate	Digital Close Enterprise	68.230.42.174	09/30/2022 11:53 AM
Cindy Closer	Edit Order	Digital Close Enterprise	68.230.42.174	09/30/2022 11:53 AM
Cindy Closer	Configure Document: "Document Two"	Digital Close Enterprise	68.230.42.174	09/30/2022 11:45 AM
Cindy Closer	Upload Document: "Document Two"	Digital Close Enterprise	68.230.42.174	09/30/2022 11:39 AM
Cindy Closer	Package reopened for modification because Need additional signature	Digital Close Enterprise	68.230.42.174	09/30/2022 11:35 AM
Cindy Closer	Closed Order	Digital Close Enterprise	68.230.42.174	09/30/2022 11:23 AM
Cindy Closer	The previous Seal with key 05a66bfb-	Digital Close Enterprise	68.230.42.174	09/30/2022 11:23 AM

Pavaso Support

Business Hours: Monday – Saturday 7:00 AM – 8:00 PM CST

Email: support@pavaso.com

Phone/ Closing Hotline: (866) 288-7051, option 3

24/7 Online Help Library: Log in to your Pavaso account and select **Help** next to your name.

*Due to state law or regulation or both, electronic notarization is not available in all areas.

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

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