



Multi-Device Closing* (MDC)

Notary Guide

Revised: 4/20/2023

Pavaso

Table of Contents

Before You Begin.....	2
What is In Person Multi-Device Closing?	2
Signer Identity Validation	2
Minimum System Requirements	2
System and Order Configuration	3
Order Settings	3
Pre-Close Tags	5
Inviting Signers	8
Performing an MDC Signing.....	9
Confirm Order Status.....	9
ID Validation	12
Starting the Closing Session	16
Sending Documents for Signature	16
Post-Closing	22
Pavaso Support	22

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.

Digital Close Enterprise

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

[Lobby](#) [View/Edit Notes](#) [Notifications](#) [Invite Others](#) [Edit Signature](#)

1123 Street, City, TX 55185

[Edit](#) [Delete](#) [Replicate Order](#)

Release Order **Invite Buyer(s) to Pre-Closing**

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](#)

Pre-Closing [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	☐	☐	04/30/2023	Edit Share Delete
Right to Rescind - Riker	☐	☐	04/30/2023	Edit Share Delete
Loan Documents				
Education Edit				
Interactive media to help you through the closing process.				
Closing Checklist				
Closing Checklist				
CEBR 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.

The screenshot shows the 'Edit Order Details' form with the following fields and values:

- Order Information**
 - Order number (*): MDC Doc_1
 - State (*): Texas
 - Order Template: (empty)
- 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 (selected)
- Test Order**: ☐
- Private Order**: ☐ ?

The 'Digital Closing Method' dropdown menu is open, showing the following options:

- (Please select an item)
- (RON) Remote Closing and Video eNotary
- (MDC) Multi-Device Closing** (highlighted in blue)

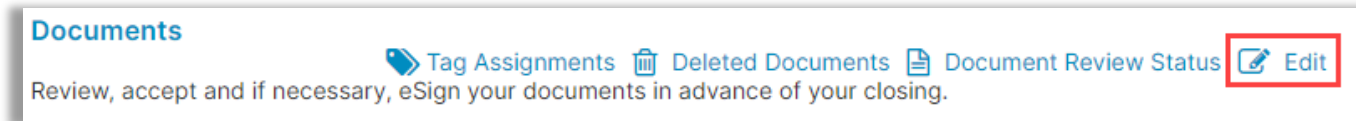
Select **Save**.



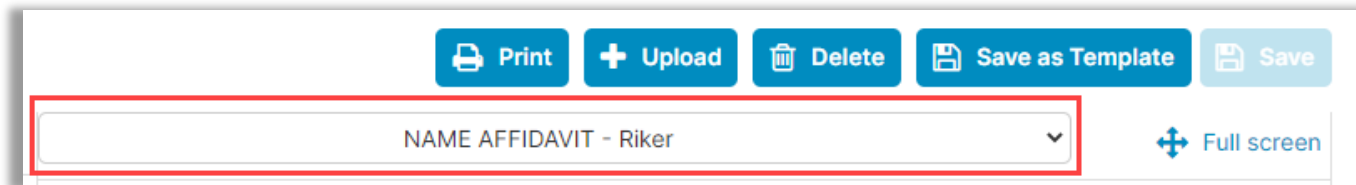
Pre-Close Tags

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 displays a mobile application interface for a notary. At the top, there is a 'Name:' field with an 'Edit' icon and a dropdown menu showing 'NAME AFFIDAVIT - Riker'. Below this, there are fields for 'Audience:' (a dropdown menu set to 'All') and 'Date Due:' (04/30/2023). There are two checkboxes: 'Additional Action Required at Closing' and 'Wet Signature Required (Hybrid Closing Only)'. Below these is a 'Document Templates:' section with a dropdown menu showing 'Please select a template'. A red rectangular box highlights a vertical stack of five blue buttons, each with a white plus icon and text: '+ Tag for Signature', '+ Tag for Initials', '+ Tag for Education', '+ Tag for Notary', and '+ Tag for Text'. At the bottom, there is a 'Custom Tags:' section with an 'Edit' icon and a dropdown menu showing '--Please select--'.

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

State/Commonwealth of: Arizona

County/Parish of: Maricopa

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

by Bob

Notary Signature

Notary Seal

NAME AFFIDAVIT
01/12/22

Details

Signer:
Wil Riker, bu

☐ Pre-closing
☒ Closing

Notarization Type:
Acknowledgment

Link to signer:
Buyer

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

Print Upload Delete Save as Template Collapse Tag Info Save

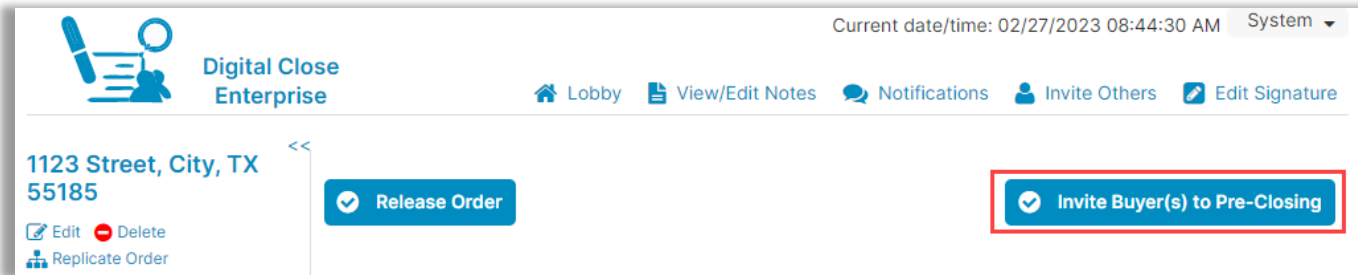
Note: Select any other documents from the drop-down menu that require tags. Once all documents have been tagged, select **Back**.

Inviting Signers

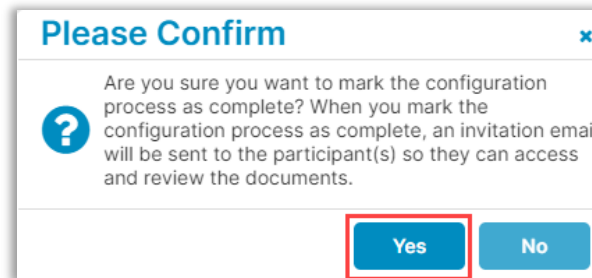
Once configuration is complete, you can invite the Signers to the order to review their documents. Selecting the **Invite Buyer(s) to Pre-Closing** button sends the invitation email asking Signers to create their account.

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 displays the 'Order Lobby' interface of the Digital Close Enterprise system. At the top, the current date/time is 02/27/2023 08:56:15 AM, and the system is set to 'System'. Navigation links include Lobby, Create Order, Notifications, and Admin. The main heading is 'Order Lobby' with a subtext 'Select an Order below to view the details'. A date range filter shows orders from 11/29/2022 to 2/27/2023. A search bar is set to 'Order Number' with a search button. Below the search bar are tabs for 'Open' and 'Closed' orders. A table lists the order details, with one order highlighted in a red box. 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

Display 1 of 1 items

When all Signers are present and have compatible devices, select **Multi-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

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

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](#) [Invite](#)

Add Participants

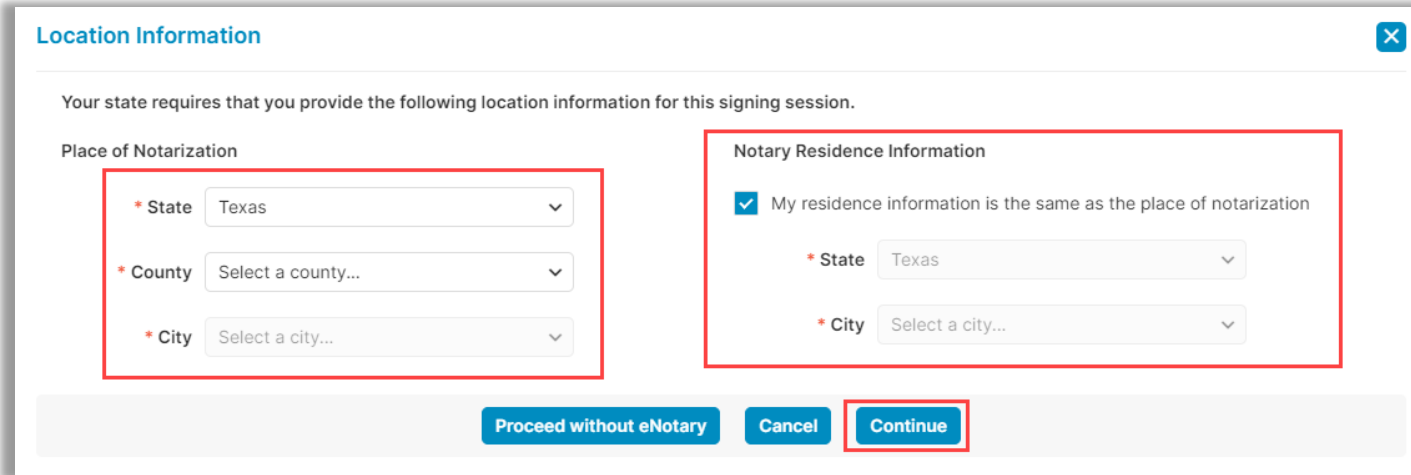
Select the users from this order that you would like to add as Participants to this Signing Session.

☒	Participant Name	Role
☒	Wil Riker	Buyer 1

[Cancel](#) [Add](#)

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

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

Place of Notarization

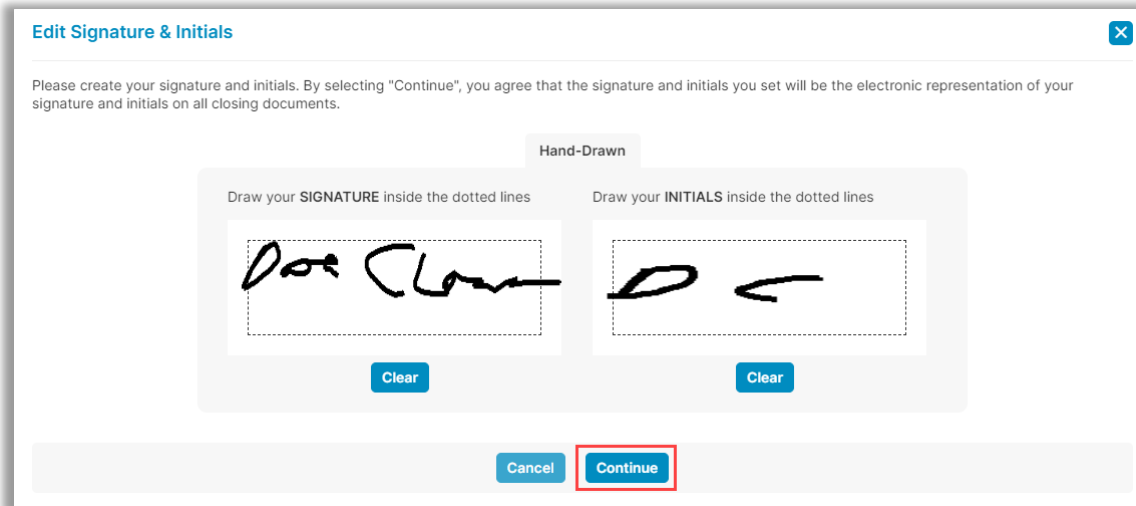
- * State: Texas
- * County: Select a county...
- * City: Select a city...

Notary Residence Information

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

Buttons: Proceed without eNotary, Cancel, Continue

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



Edit Signature & Initials

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

Buttons: 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.

 Closing #BH_03082023
Loan #
543 Uno Avenue, Dallas, TX 12345

0% Complete

Contact Support

End Session ✕

Start Signing Session

Signature & Initials  CC   **Start Signing >**

Participants (1) **Add** **Invite**

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 [X]

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... [v]

- 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

Driver's License

* Country Code

+1 - United States

* Phone Number

(555) 555-5555

Cancel

Enter Info Instead

Continue

Starting the Closing Session

Sending Documents for Signature

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

Start Signing Session

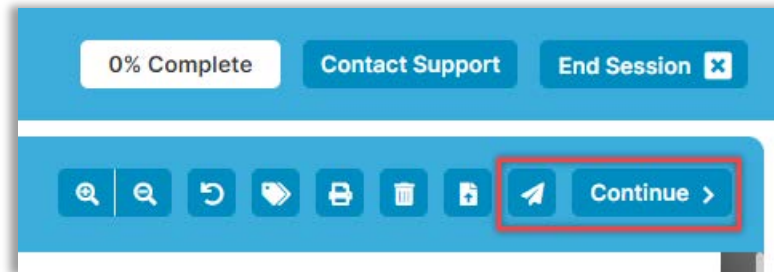
Participants (1) [Add](#) [Invite](#)

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

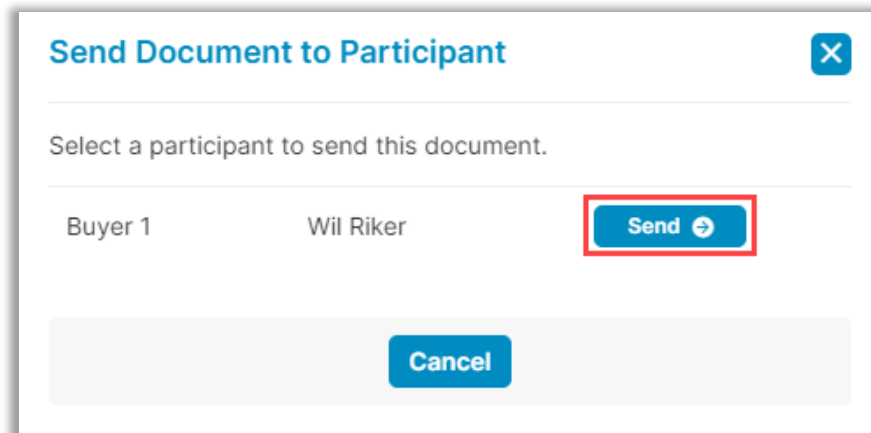
The **InstaTag** toolbar can be used to zoom, rotate, tag, print, delete, upload and send documents to the Buyer.



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 WRE C-shi waki
bien khi add notary tag
mhi khi thien tag

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

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

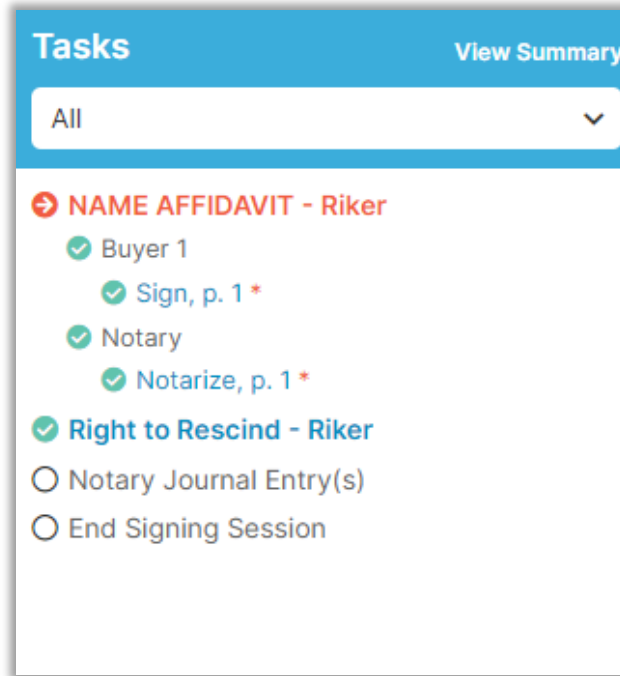
NAME AFFIDAVIT
01/12/22

Notary Public

Does not expire

My Commission Expires: _____

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) Comments

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 ▾

[Lobby](#) [Notifications](#)

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](#)