



Observer Role

Remote Online Notarization (RON)

Revised: 1/25/2024

Pavaso

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What is the Observer Role

The Observer role is intended for individuals who:

- Have permission to participate in the closing via audio and webcam.
- Do not need to sign any documents.
- Do not require identity verification through ID validation and Knowledge-Based Authentication (KBA).

Before you Begin

- Confirm with your Implementation Lead that Remote Online Notarization (RON) is enabled for your company on Pavaso.
- Confirm you have met all legal, underwriting, and state requirements before conducting a RON session.
- Confirm the Remote Closing and Video eNotary closing method is selected in Order Details.

Edit Order Details

Order Information

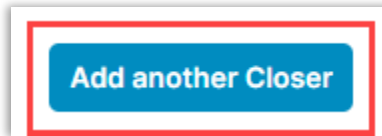
Order number (*) Exampleorder123	State (*) Texas	Order Template
Order Open Date 11/16/2023	Sales Price 0.00	
Closing Date (*) 01/19/2024	Closing Time (*) 11:12 AM UTC-7 MST	
Closing Type Digital Closing	Signing Process for Consumer Approve All, Sign Once	Digital Closing Method (RON) Remote Closing and Video el

Observer Role for Closing Agents

Adding a Closing Agent as an Observer

A Closing Agent, directly associated with a company on Pavaso, may be added as an Observer from within Order Details.

Select Add Another Closer.



1. Choose the appropriate Company.
2. Select the Closer's Email Address from the dropdown.
3. Confirm the Closer's information is filled in and or correct.
4. Check the Observer for this RON Order box.

Closer 2

☒ Company

Company

1

Stargazer Title

☐ Other

Closer Email Address (*)

Closer Email Address (*)

2

jeanlucpicard@mailinator.com

Username

jeanlucpicard@mailinator.com

3

First Name (*)

Jean-Luc

Middle Name

Last Name (*)

Picard

Street Address

1234 Street

City

City

Cell Phone

(555) 555-5555

Zip Code

85555

State

Texas

Is this Closer the Notary for this Order?

☐ Yes

☐ No (Please fill in the Notary details below)

☒ Unknown Notary

4

☒ Observer for this RON Order

Add another Closer

Remove this Closer

Observer Role for Remote Witness

Adding a Remote Witness as an Observer

Under the Additional Party section of Order Details:

1. Select Witness from the drop-down menu.
2. Enter their Email Address.
3. Fill in and or confirm their information.
4. Check the Observer for this RON Order box.

Additional Party 1

As Role (*) 1	Email Address (*) 2	Username
Witness ▼	tomparis@mailinator.com	tomparis@mailinator.com
First Name (*)	Middle Name	Last Name (*)
Tom	3	Paris
Cell Phone	Street Address (*)	City (*)
(555) 555-5555	1532 Street	City
State (*)	Zip Code (*)	
Texas ▼	85555	
International Phone Number		
+1-Canada ▼		
<input type="text"/>		
<input type="text"/>		
<input checked="" type="checkbox"/> Observer for this RON Order 4		

Observer Role for Lenders

Adding a Lender as an Observer

Under the Lender section of Order Details:

1. Select the Company from the drop-down menu.
2. Enter their Email Address.
3. Check the Observer for this RON Order box.

Lender | [Update User Details](#)

☒ Company

Company **1**

Discovery Lending ▼

Lender Email Address **2**

michaelburnham@mailinator.com ▼

Username

michaelburnham@mailinator.com

☐ Other

Lender Email Address

Lender First Name

Discovery

Lender Middle Name

Lender Last Name

Lending

Street Address

City

Cell Phone

(555) 555-5555

Zip Code

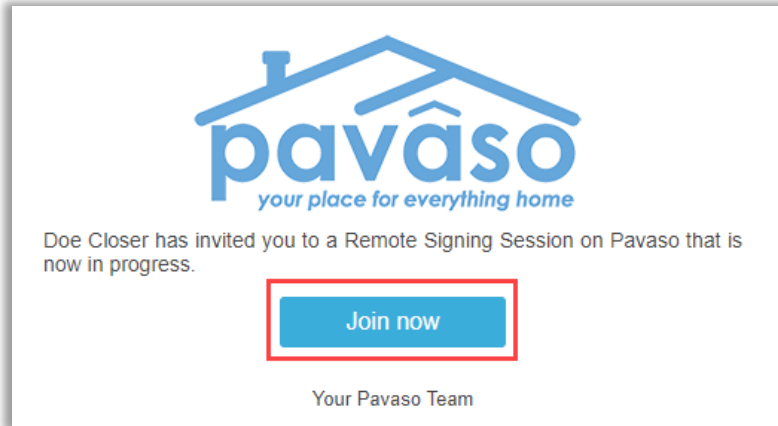
State

(Please select an item) ▼

3 ☒ Observer for this RON Order

How Observers Join the Signing

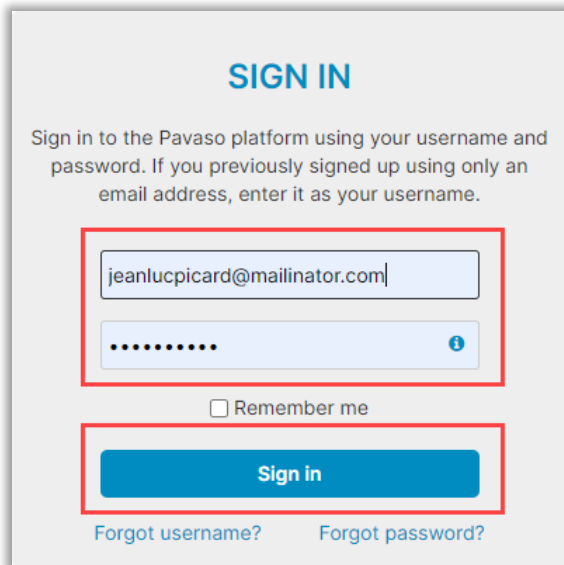
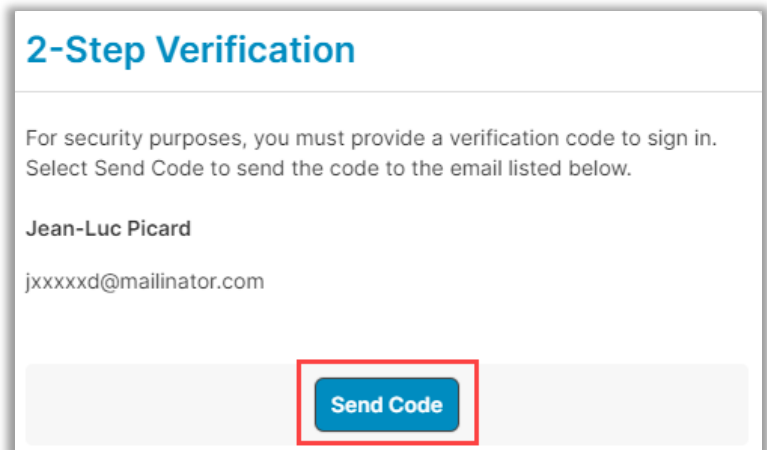
An email will be sent to the Observer to join the session. Select **Join now**.



Entering the Session as an Observer

After receiving notification that the order is ready to close, access Digital Close Enterprise.

Fill in your Username and Password, then select **Sign in**. Select the platform to receive your security code and select **Send Code**.

A screenshot of the Pavaso 'SIGN IN' form. The title 'SIGN IN' is in blue. Below it, the text says: 'Sign in to the Pavaso platform using your username and password. If you previously signed up using only an email address, enter it as your username.' There are two input fields: the first contains the email 'jeanlucpicard@mailinator.com' and the second contains a masked password '.....'. Both input fields are highlighted with a red rectangular border. Below the password field is a checkbox labeled 'Remember me'. At the bottom is a blue button with the text 'Sign in', also highlighted with a red rectangular border. Below the button are two links: 'Forgot username?' and 'Forgot password?'.A screenshot of the Pavaso '2-Step Verification' form. The title '2-Step Verification' is in blue. Below it, the text says: 'For security purposes, you must provide a verification code to sign in. Select Send Code to send the code to the email listed below.' The email address 'Jean-Luc Picard' and 'jxxxxxd@mailinator.com' is listed. At the bottom is a blue button with the text 'Send Code', highlighted with a red rectangular border.

Enter your security code and select **Continue**.

2-Step Verification

Please enter your verification code to continue.

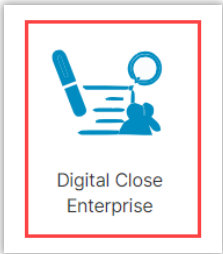
Verification Code

.....|

[Resend Code](#)

Continue

Select Digital Close Enterprise.



Select the Order.

Order Lobby

Select an Order below to view the details

Display orders from: 10/18/2023 to: 1/16/2024

Show deleted orders ☐

Search Criteria: Order Number

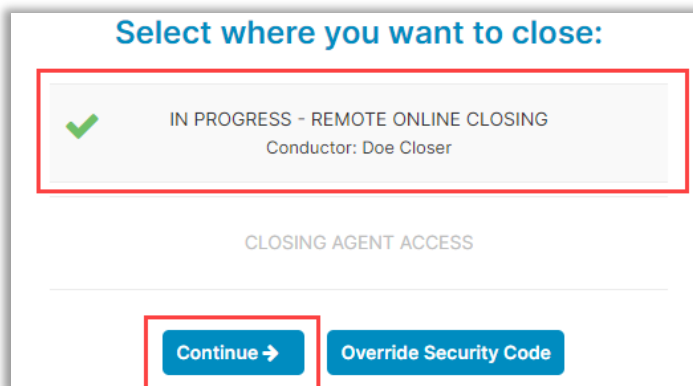
Search

Open

Closed

ORDER NUMBER	LOAN NUMBER	BORROWER	SELLER	NOTARY	COMPANY	PROPERTY	SCHEDULED CLOSING DATE	ACTUAL CLOSING DATE	STATUS
Testord...		Tom Paris		N/A	Stargazer Title	1123 Street, City, TX 55185	01/19/2024 11:51 AM Mountain		Pending Closing

Select **In Progress**, then **Continue**.



Select where you want to close:

✓ IN PROGRESS - REMOTE ONLINE CLOSING
Conductor: Doe Closer

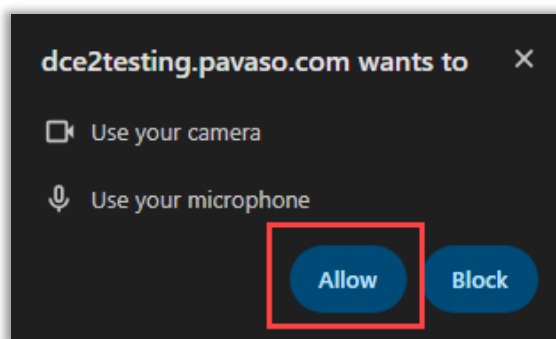
CLOSING AGENT ACCESS

Continue → Override Security Code

System Test

Observers are required to complete the system test as they will be able to participate in the audio and visual components of the session. Camera, microphone, and speakers are required to proceed.

Select **Allow**.



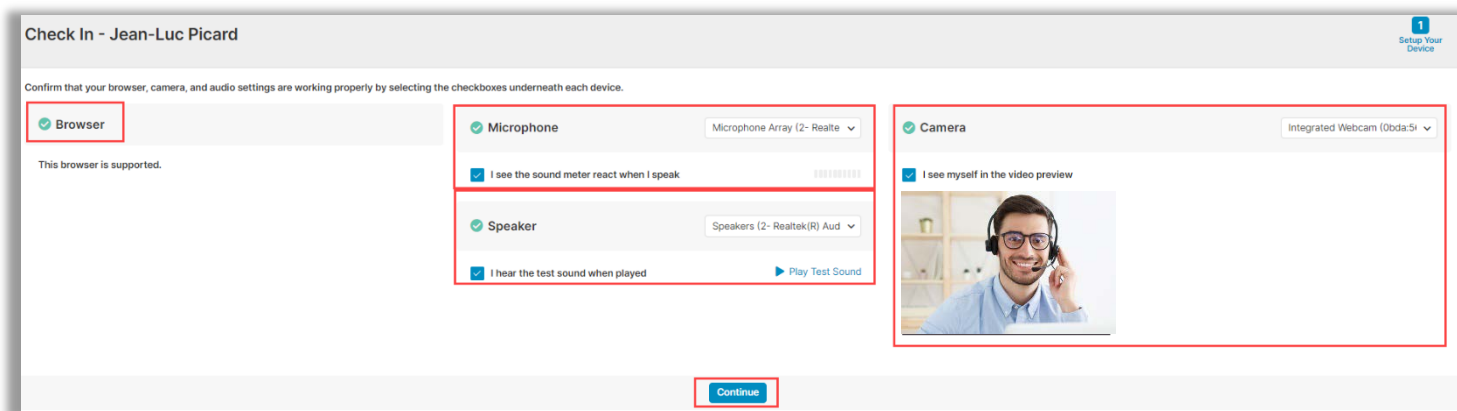
dce2testing.pavaso.com wants to

Use your camera

Use your microphone

Allow Block

Verify browser, microphone, speaker, and camera and select **Continue**.



Check In - Jean-Luc Picard

Confirm that your browser, camera, and audio settings are working properly by selecting the checkboxes underneath each device.

☒ Browser
This browser is supported.

☒ Microphone
Microphone Array (2- Realte
☒ I see the sound meter react when I speak

☒ Speaker
Speakers (2- Realtek(R) Aud
☒ I hear the test sound when played

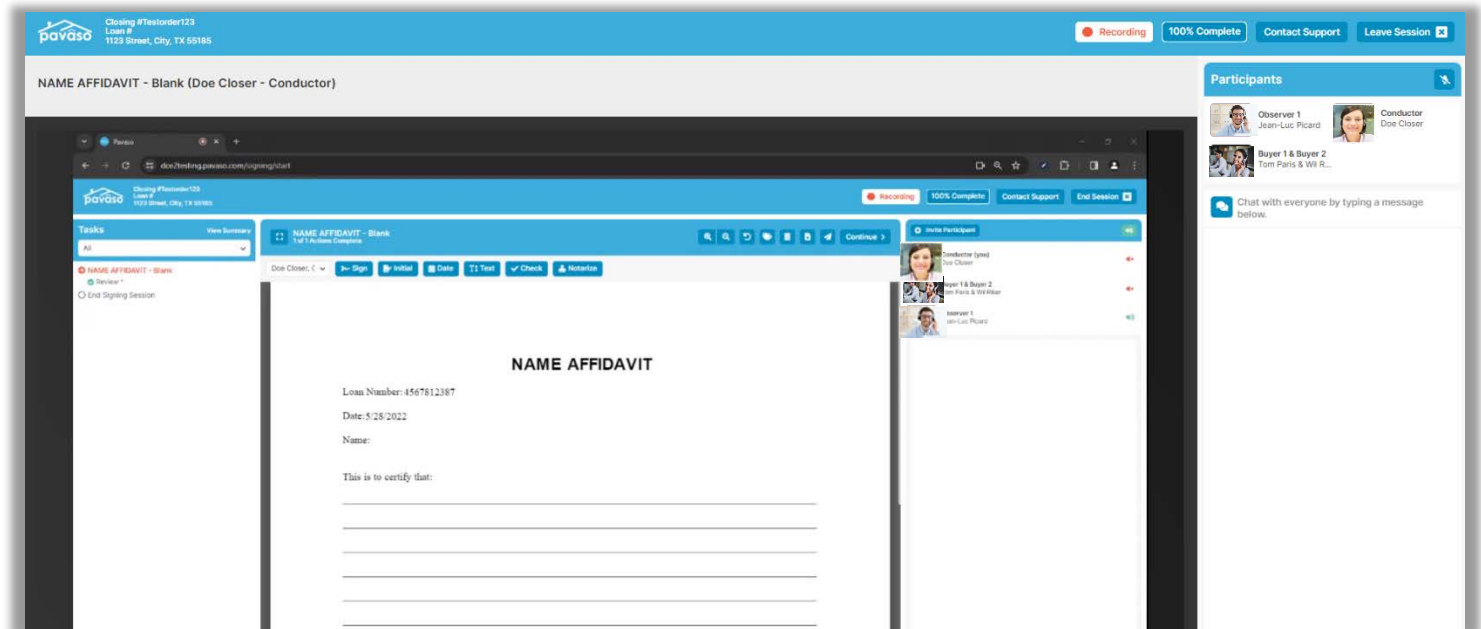
☒ Camera
Integrated Webcam (0bda:5
☒ I see myself in the video preview

Continue

Session View

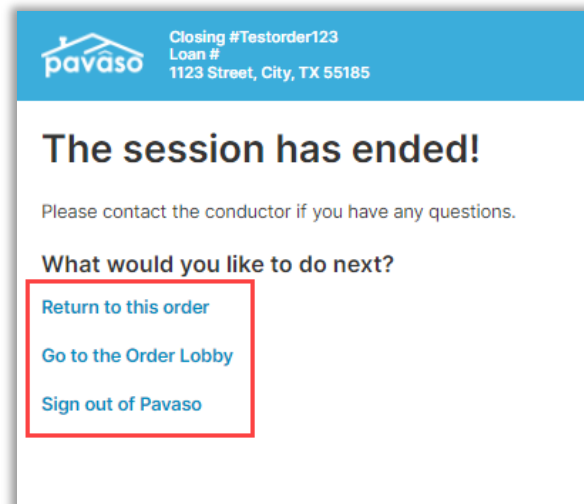
Once the closing agent begins the session, the Observer will see all actions on the closing agent's screen. This may include:

- Passing of documents to Signer(s)
- Signing of documents
- Notarization (if applicable) of documents
- Completing the eNotary journal



Once the session is finished you can select:

- Return to this order
- Go to the Order Lobby or
- Sign out of Pavaso



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](#)