



InstaTag Toolbar

Flexible Tagging for In-Person and Remote Signings

Revised: 5/21/2024

Pavaso

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About the InstaTag Toolbar

When can I use the InstaTag Toolbar?

During in-person and RON (Remote Online Notarization)* signings, all permissible users participating in the signing will have access to the InstaTag Toolbar. The InstaTag Toolbar is also available in the Pre-Close Setup and Pre-Closing phases.

What is the benefit of the InstaTag Toolbar?

The InstaTag Toolbar gives more flexibility to Pavaso's users, including:

- An additional, convenient tool for placing signatures and other tags during closing
- Quickly place signature, initials, date, custom text, checkboxes, and notary* (where applicable) tags in a pre-filled form.

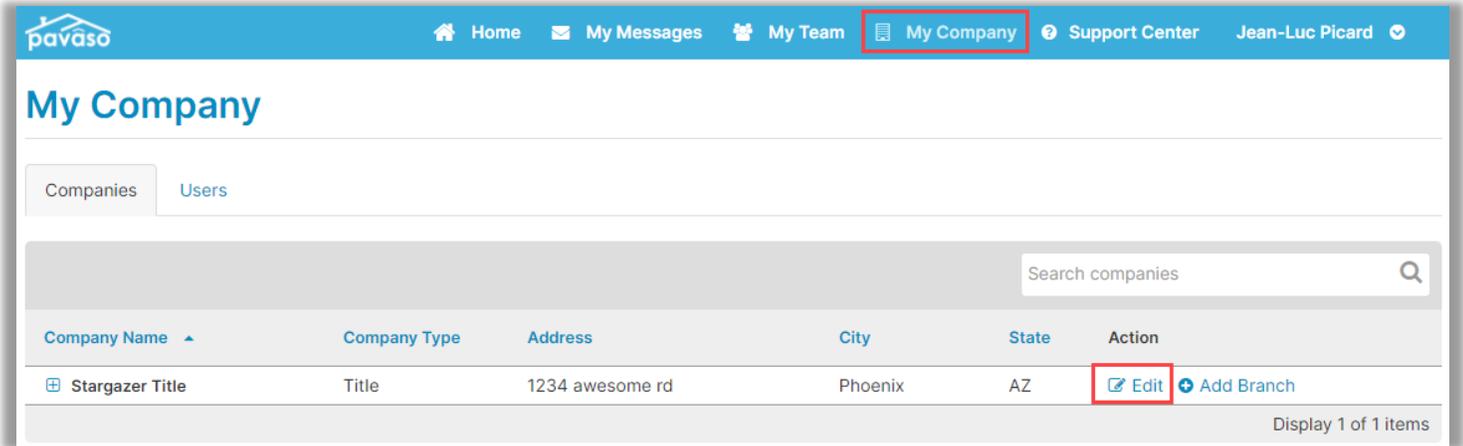
Is the InstaTag Toolbar available to Signers during their Pre-Closing Document Review in advance of the signing?

The InstaTag Toolbar can be enabled and available during signings or during the Pre-Closing Document Review. The Toolbar is also available for Non-Consumers in the Pre-Close Setup phase.

Enabling the InstaTag Toolbar

Note: Only Company Admins have access to turn on the InstaTag Toolbar.

Select **My Company** and **Edit**.



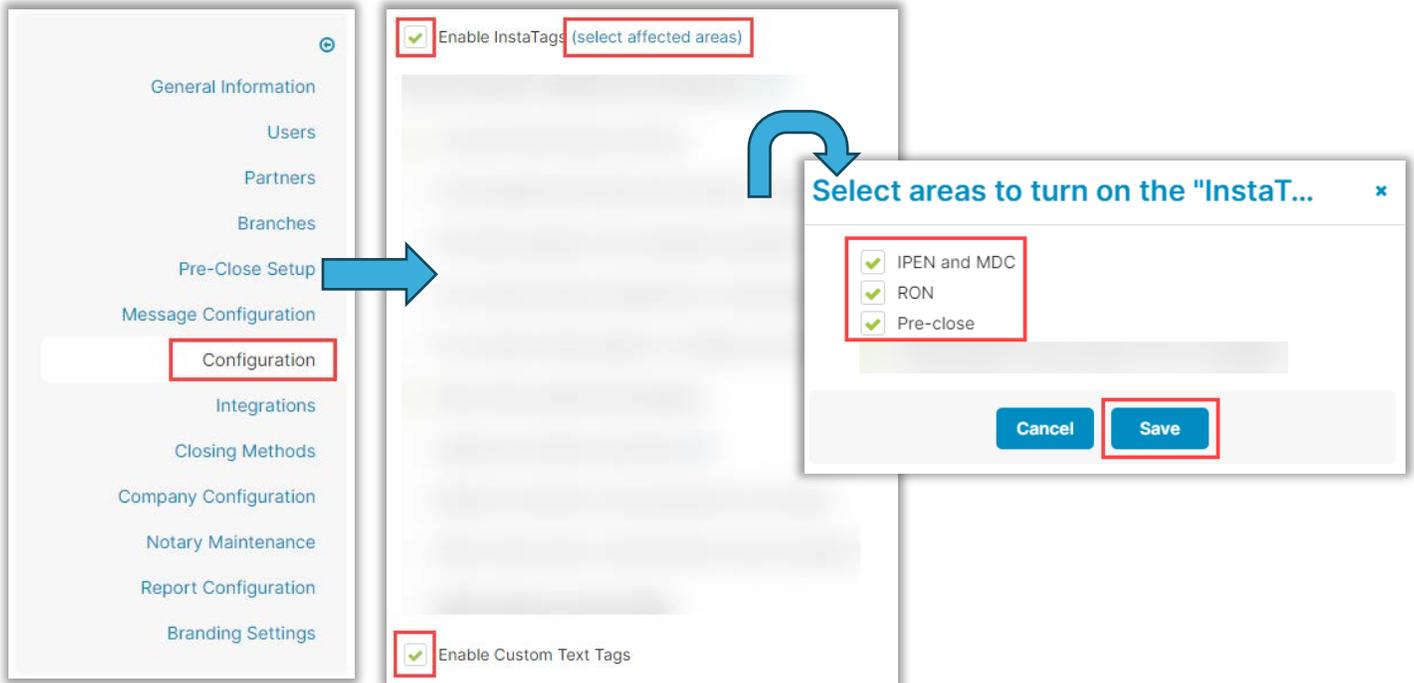
Select **Configuration** and **Enable InstaTags**.

Choose **(select affected areas)** to choose closing types where InstaTags should be enabled.

- **IPEN** – InstaTag Toolbar appears during closing for in-person signings.
- **RON** – InstaTag Toolbar appears during closing for remote signings.
- **Pre-Close** – InstaTag Toolbar appears for Non-Consumer users in the Pre-Close Setup phase and for Signers during the Pre-Closing Document Review.

Note: This selection will not apply to all branches if enabled at the parent company level.

Note: If your company allows, the option for **Enable Custom Tags** is here.



InstaTag Toolbar – Pre-Closing

Non-Consumer View

Note: Non-Consumer is defined by Closing Agent, Lender, Loan Officer, Loan Processor on Pavaso.

The InstaTag Toolbar is available to Non-Consumers users when viewing a document in the **Pre-Closing Review** phase. This option is available after the Signers have been invited to the order.

To view the InstaTag Toolbar and complete a digital tag, select the appropriate document. Do not open the document in edit mode.

Current date/time: 05/17/2024 08:31:38 AM

Digital Close Enterprise

Lobby View/Edit Notes Notifications Edit Signature

1123 Street, City, TX 55185

Release Order You have invited all participants to review their documents.

Pre-Closing Edit

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!

Documents Tag Assignments Deleted Documents Document Review Status Upload Edit

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

| | Reviewed | Accepted | Date Due | Added By | |
|--------------------------|--------------------------|--------------------------|------------|-----------------|--|
| Title Documents | | | | | |
| Compliance Agreement | <input type="checkbox"/> | <input type="checkbox"/> | 05/17/2024 | Stargazer Title | |
| DownloadNotaryForm | <input type="checkbox"/> | <input type="checkbox"/> | 05/17/2024 | Stargazer Title | |
| NAME AFFIDAVIT - Blank | <input type="checkbox"/> | <input type="checkbox"/> | 05/17/2024 | Stargazer Title | |
| NAME AFFIDAVIT - Riker | <input type="checkbox"/> | <input type="checkbox"/> | 05/17/2024 | Stargazer Title | |
| Right to Rescind - Riker | <input type="checkbox"/> | <input type="checkbox"/> | 05/17/2024 | Stargazer Title | |
| Loan Documents | | | | | |

Education Edit

Take a Tour

Pre-Closing Review

Closing Setup

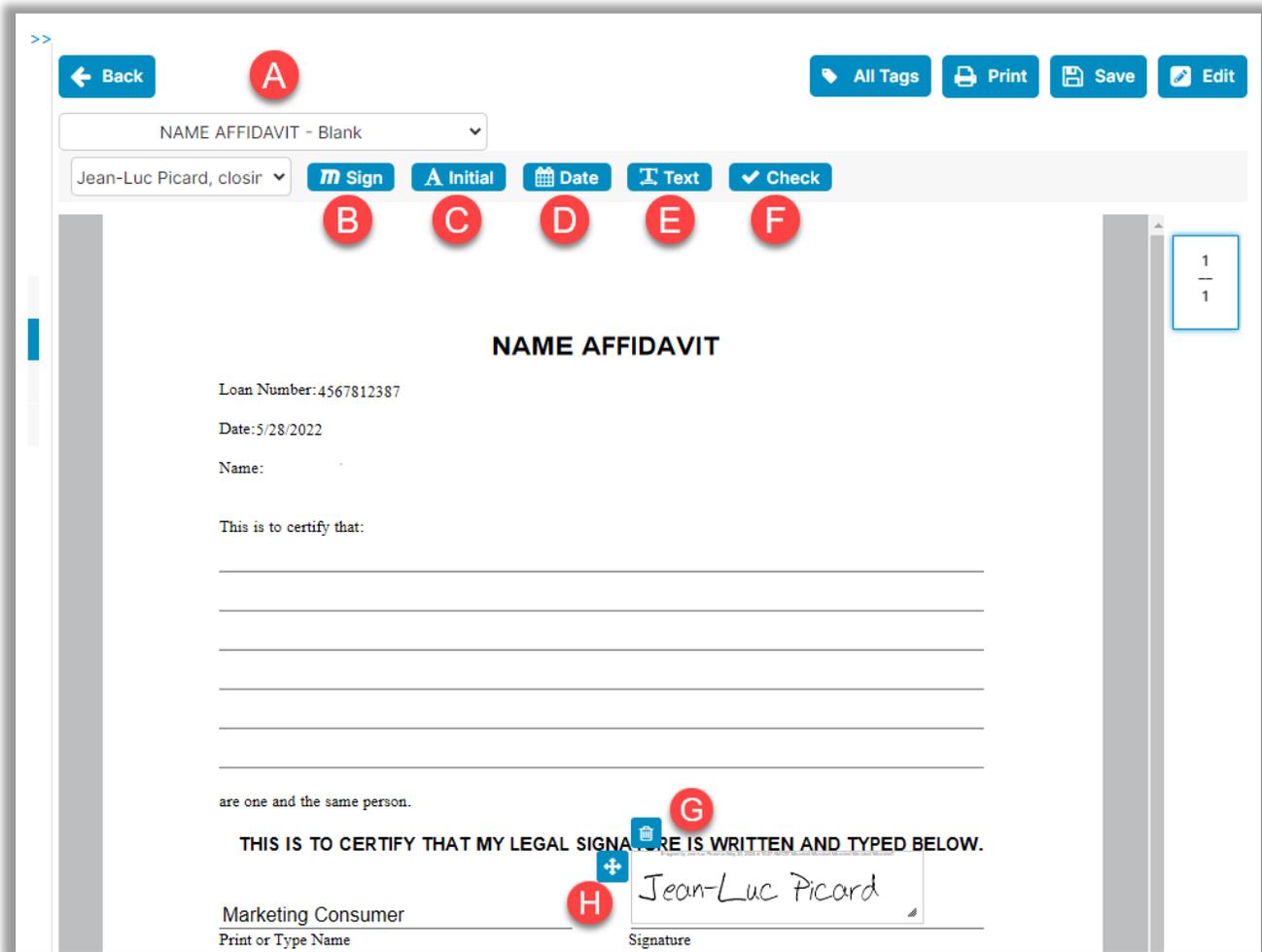
Closing

Once the document is opened, the InstaTag Toolbar appears across the left side of the document. The user can select any of these options to apply to the document.

Note: Notarization cannot be performed at this stage. Notarization must still be completed in the presence of Signers during the closing.

- A. Drop down showing which document you are on and to select other documents.
- B. Select **Sign**. Hover over the document and click or tap to place the completed signature tag for the selected Signer. If the signature has not previously been established for the user, a pop-up appears to capture their signature.
- C. Select **Initial**. Hover over the document and click or tap to place the completed initial tag for the selected Signer.
- D. The **Date** InstaTag will place a completed date tag with the current date based on the time showing on the device used for the signing.
- E. The **Text** InstaTag places an empty text tag to be filled out by any party present. There is no Signer assignment for the text InstaTag.
- F. The **Check** InstaTag places a completed checkmark.
- G. **Trash Bin** is used for deleting a tag.
- H. **Crosshairs** allow the user to move added tags.

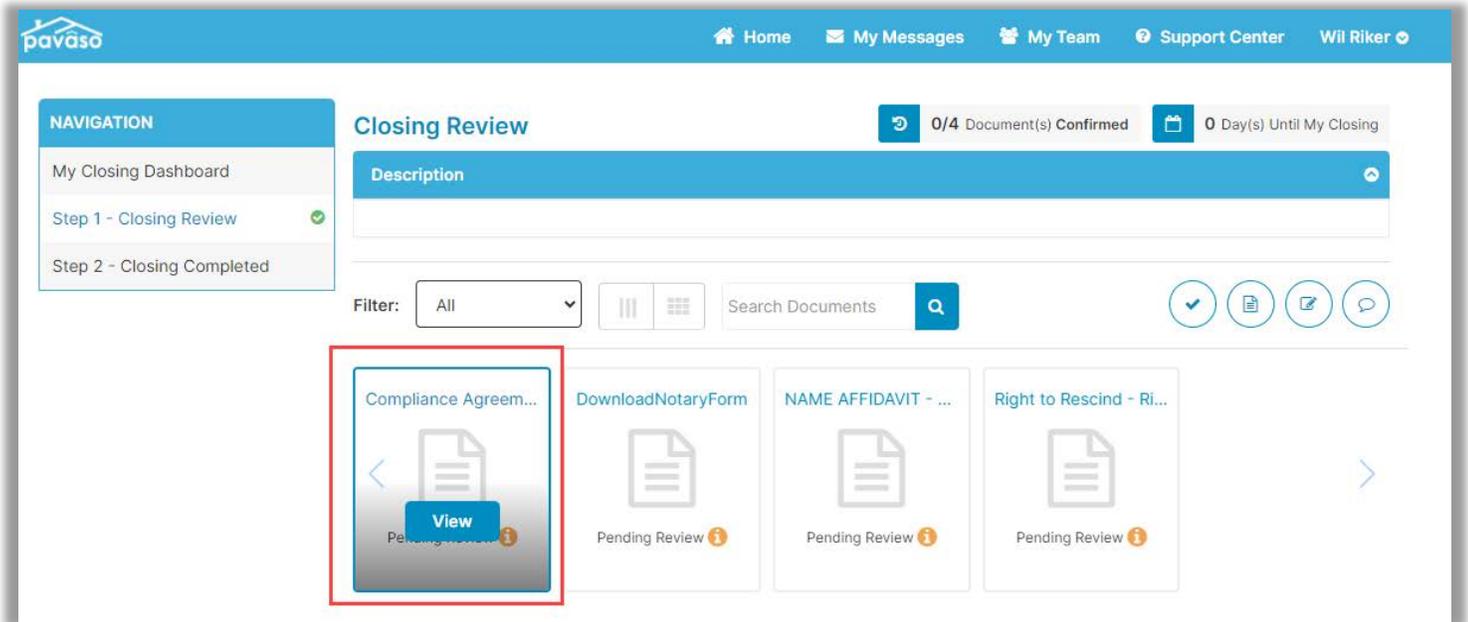
Select **Save** after placing InstaTags. Once the document is saved, InstaTags cannot be modified.



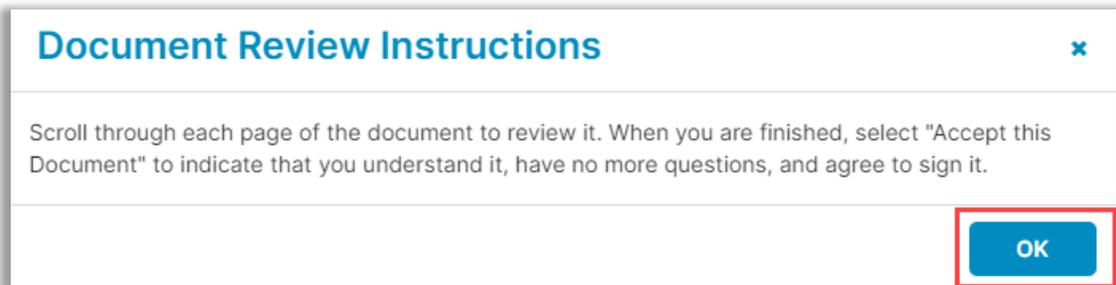
InstaTag Toolbar – Pre-Closing

Signer View

The Signer will access their order and select a document to open, select **View**.

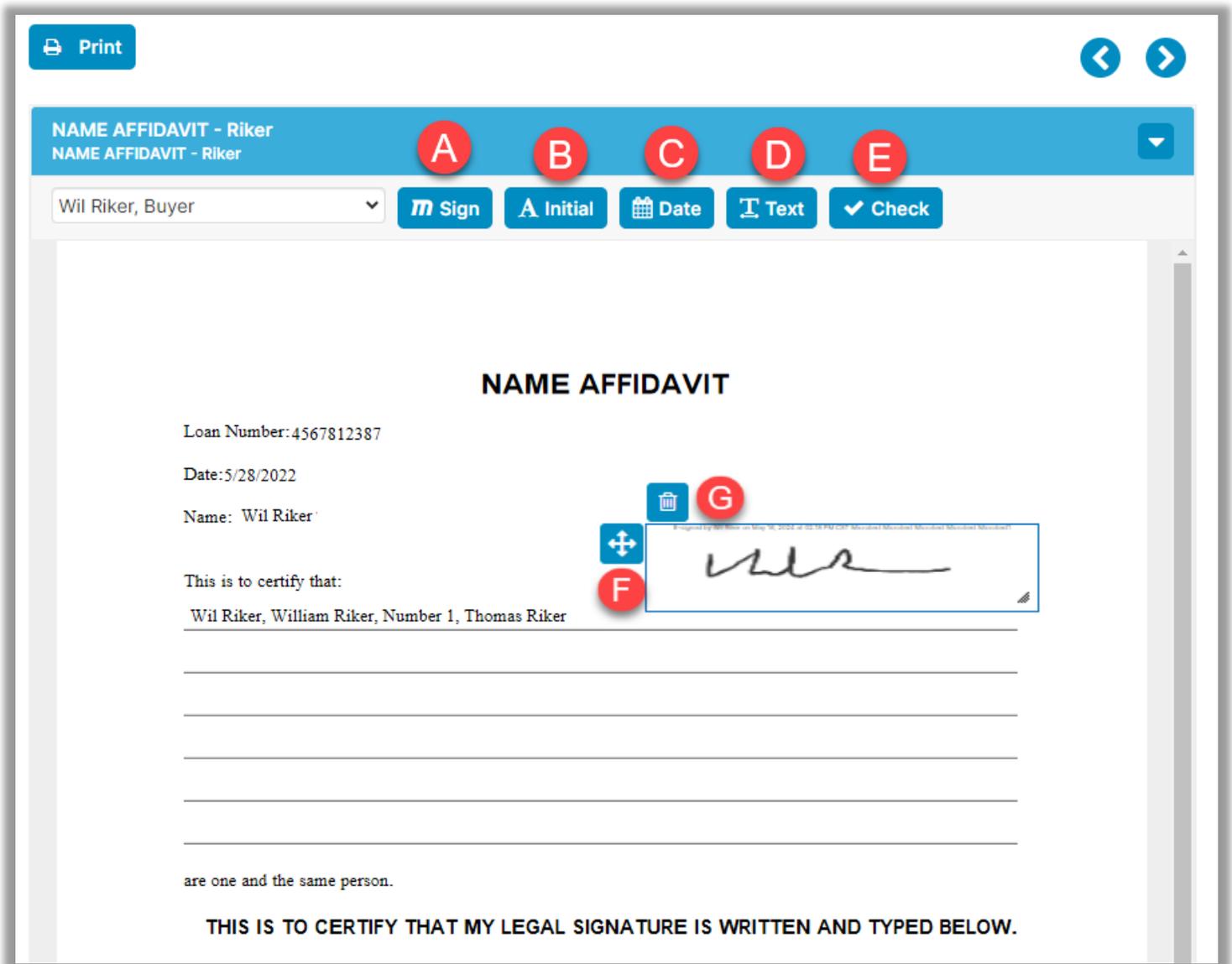


Select **OK** on the Document Review Instructions pop-up.

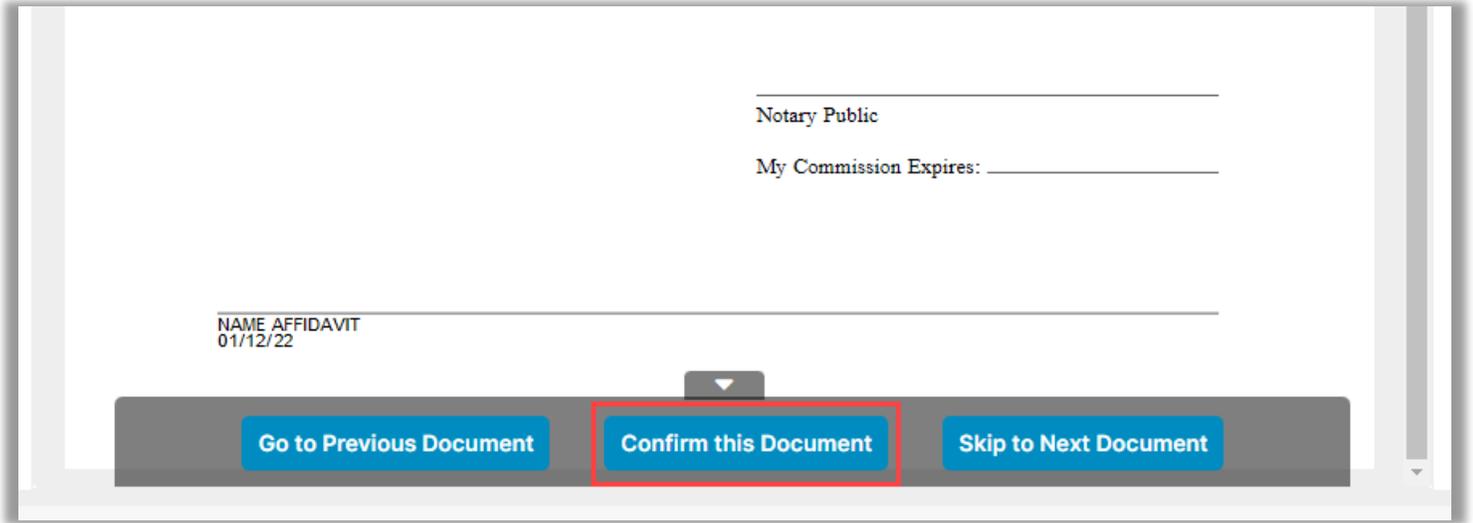


The InstaTag Toolbar appears across the top of the document.

- A. Select **Sign**. Hover over the document and click or tap to place the completed signature tag for the selected Signer. If the signature has not previously been established for the user, a pop-up appears to capture their signature.
- B. Select **Initial**. Hover over the document and click or tap to place the completed initial tag for the selected Signer.
- C. The **Date** InstaTag will place a completed date tag with the current date based on the time showing on the device used for the signing.
- D. The **Text** InstaTag places an empty text tag to be filled out by any party present. There is no Signer assignment for the text InstaTag.
- E. The **Check** InstaTag places a completed checkmark.
- F. **Trash Bin** is used for deleting a tag.
- G. **Crosshairs** allow the user to move added tags.

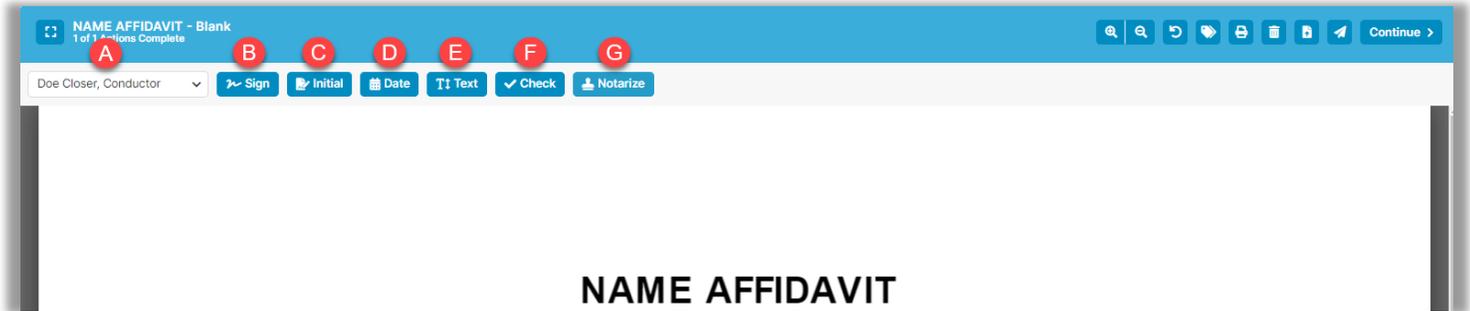


The Signer must select **Confirm this Document** to save the InstaTags.



InstaTag Toolbar During In-Person Closings

The InstaTag toolbar is visible during signing above the document viewer.

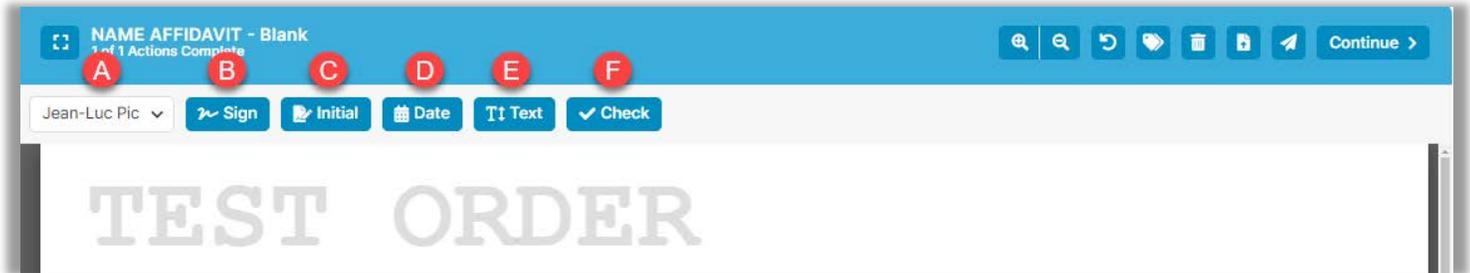


- A. Select the appropriate Signer from the drop-down.
- B. Select **Sign**. Hover over the document and click or tap to place the completed signature tag for the selected Signer.
- C. Select **Initial**. Hover over the document and click or tap to place the completed initial tag for the selected Signer.
- D. The **Date** InstaTag will place a completed date tag with the current date based on the time showing on the device used for the signing.
- E. The **Text** InstaTag places an empty text tag to be filled out by any party present. There is no Signer assignment for the text InstaTag.
- F. The **Check** InstaTag places a completed checkmark.
- G. **Notarize** adds your notary stamp and information to the document.

InstaTag Toolbar During RON Closings

Closing Agent View

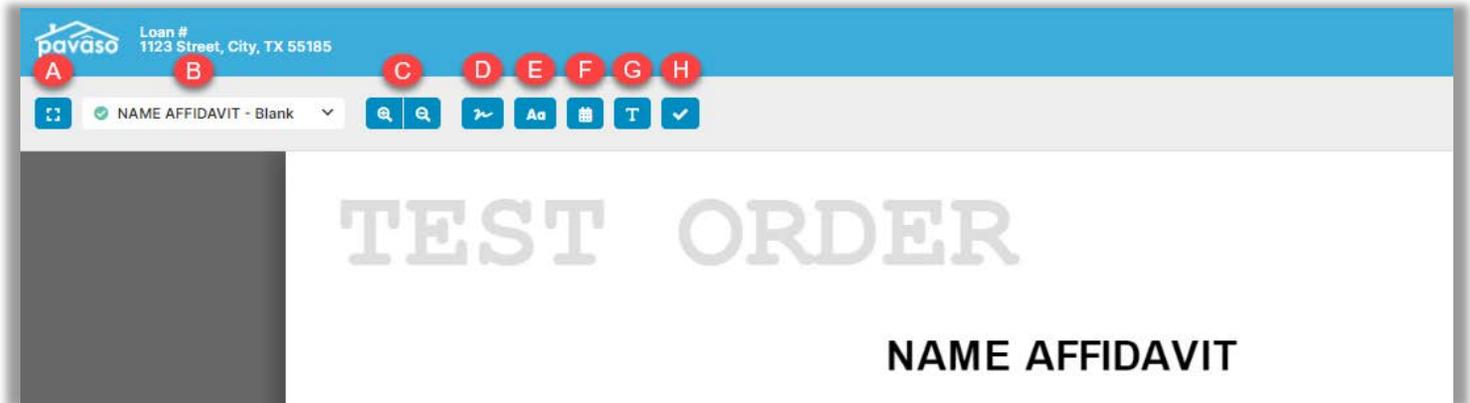
The InstaTag Toolbar displays above the document viewer for the Closing Agent to select.



- A. Select the appropriate Signer from the drop-down. The **Add Witness** will prompt information for an [In-Person Witness](#).
- B. Select **Sign**. Hover over the document and click to place the completed signature tag for the selected Signer.
- C. Select **Initial**. Hover over the document and click to place the completed initial tag for the selected Signer.
- D. The **Date** InstaTag will place a completed date tag with the current date based on the time showing on the device used for the signing.
- E. The **Text** InstaTag places an empty text tag to be filled out by any party present. There is no Signer assignment for the text InstaTag.
- F. The **Check** InstaTag places a completed checkmark.

Signer View

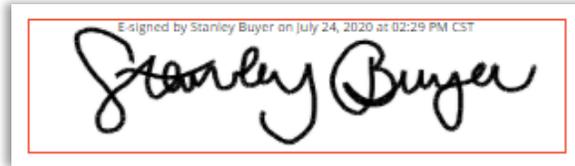
The Signer can also select appropriate pre-filled tags from the InstaTag Toolbar.



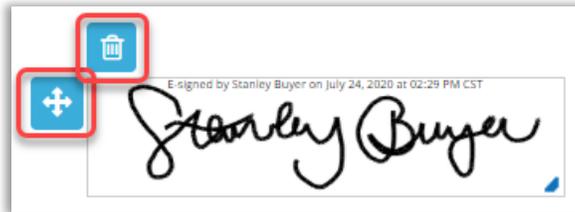
- A. Option for Full Screen.
- B. Selects the document to sign.
- C. Zoom in and out option.
- D. Select **Sign**. Hover over the document and click to place the completed signature tag for the selected Signer.
- E. Select **Initial**. Hover over the document and click to place the completed initial tag for the selected Signer.
- F. The **Date** InstaTag will place a completed date tag with the current date based on the time showing on the device used for the signing.
- G. The **Text** InstaTag places an empty text tag to be filled out by any party present. There is no Signer assignment for the text InstaTag.
- H. The **Check** InstaTag places a completed checkmark.

InstaTag Display/Sizing

When the InstaTag is select, a red border shows around the tag.

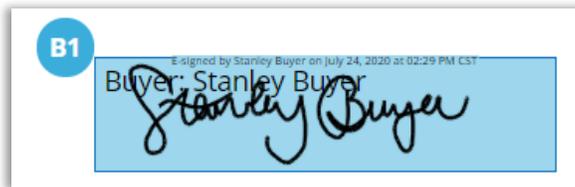


Once placed, the border will change to gray. The InstaTag can also be moved using the arrows or deleted using the trash can icon.

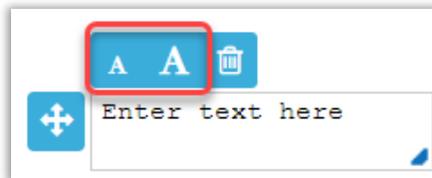


Once the document has been saved, any placed InstaTags will appear with their individual color and identifier.

Important Note: Once a document is saved, the InstaTag cannot be moved or deleted.



Font size in the text InstaTag can be increased or decreased as needed.



Pavaso Support

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

Phone/ Closing Hotline: (866) 288-7051

Email: support@pavaso.com

Online Help Library: Sign in to your Pavaso account and select Support Center