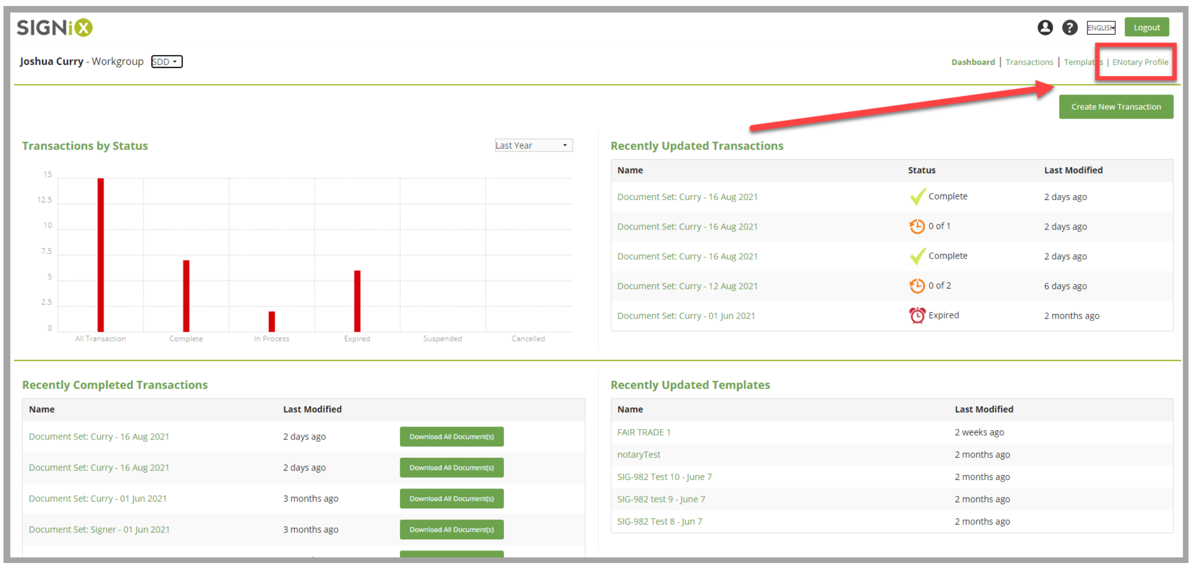
<u>Navigating the Document Center Home page:</u>

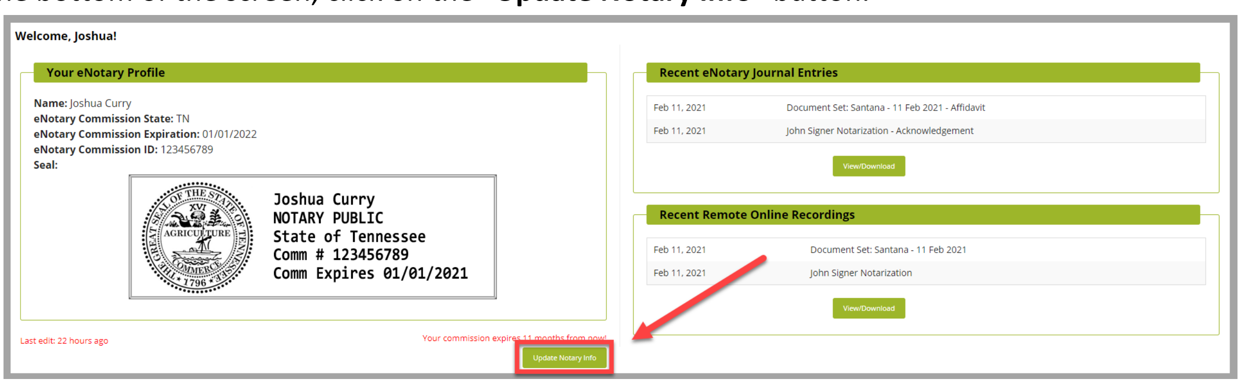
1. To login to SIGNiX.net you will receive an email from our customer support team (customersupport@signix.com) with a unique URL for you to use. Please save this into your favorites, as it will be the only way for you to login to SIGNiX.
2. The home page is broken up in to 4 screens to help you find the most relevant information quickly. You can select any of headings for these sections to see more.

<u>Entering Notary Information:</u>

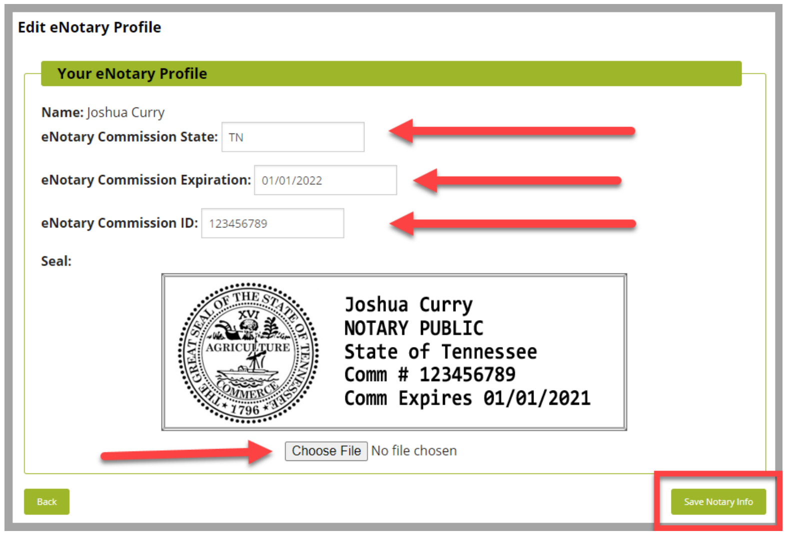
1. You will need to have an electronic image of your notary stamp in either PNG or JPEG format. You can either take a photo of your 'wet' stamp on a piece of paper, and save the photo to be uploaded, or you can purchase a digital stamp online. We recommend www.enotarysupplies.com and make sure to use coupon code "Signix" to save $5.
2. From the Home page, select "**eNotary Profile**".



3. At the bottom of the screen, click on the "**Update Notary Info**" button.



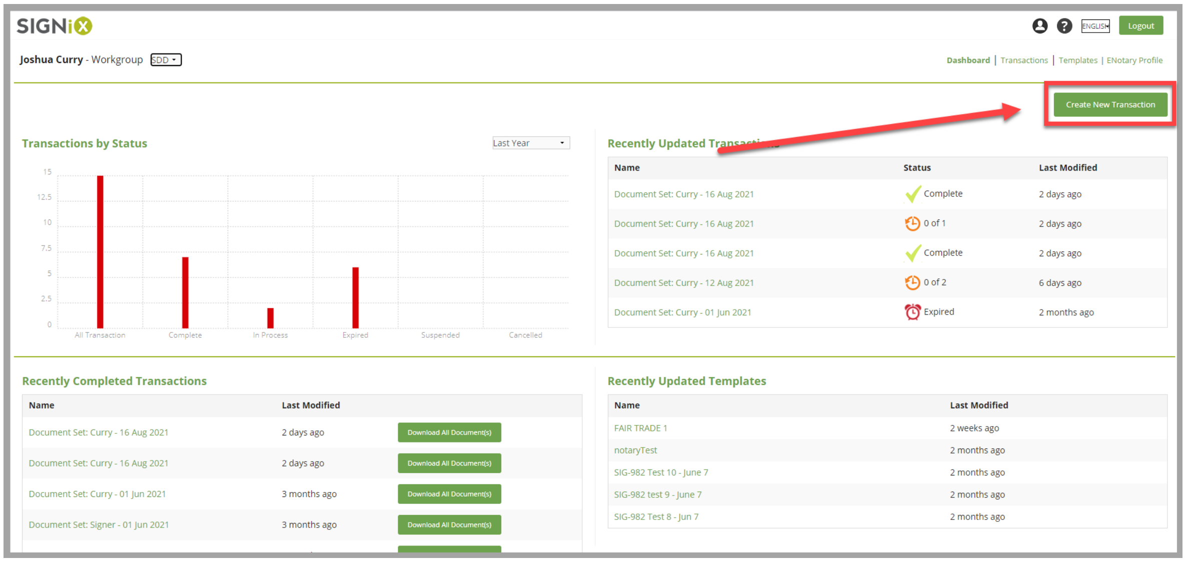
4. This will allow you to enter/update your notary commission information. Input "**Commission State**", "**Commission Expiration**", "**Commission ID**", and "**Seal**". You cannot leave any of these fields blank. To upload your seal, upload a PNG or JPEG image file less than 500KB. Once complete, select "**Save Notary Info**" to complete the update.


Edit eNotary Profile
Your eNotary Profile
Name: Joshua Curry
eNotary Commission State: TN
eNotary Commission Expiration: 01/01/2022
eNotary Commission ID: 123456789
Seal:
Joshua Curry
NOTARY PUBLIC
State of Tennessee
Comm # 123456789
Comm Expires 01/01/2021
Choose File No file chosen
Back
Save Notary Info

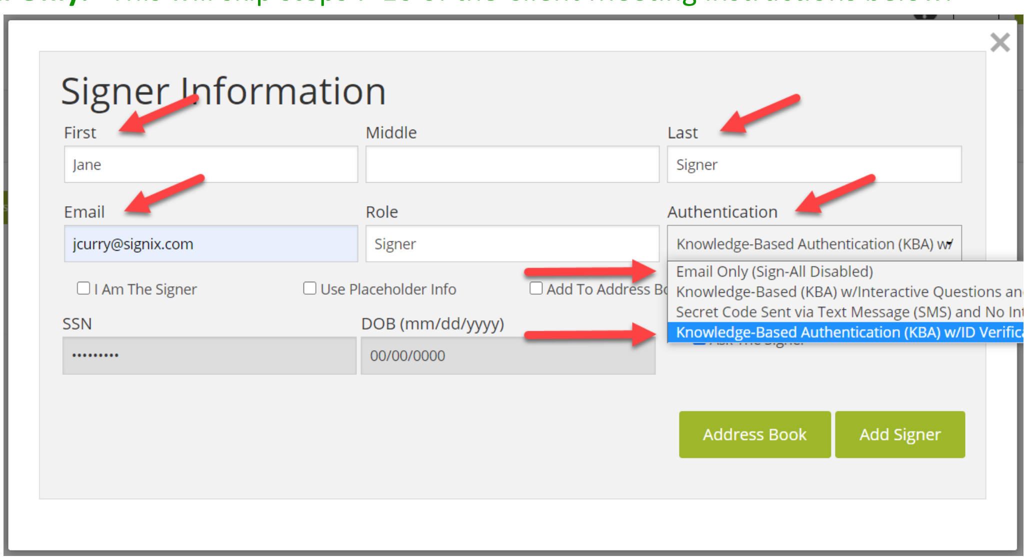
<u>Creating an enotary transaction:</u>

Adding Signers

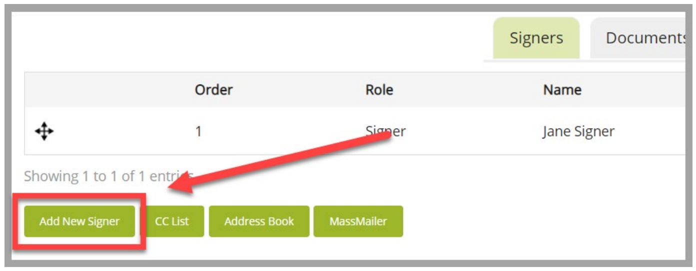
1. From the Document Center Home screen, select “**Create New Transaction**” in the upper right corner.



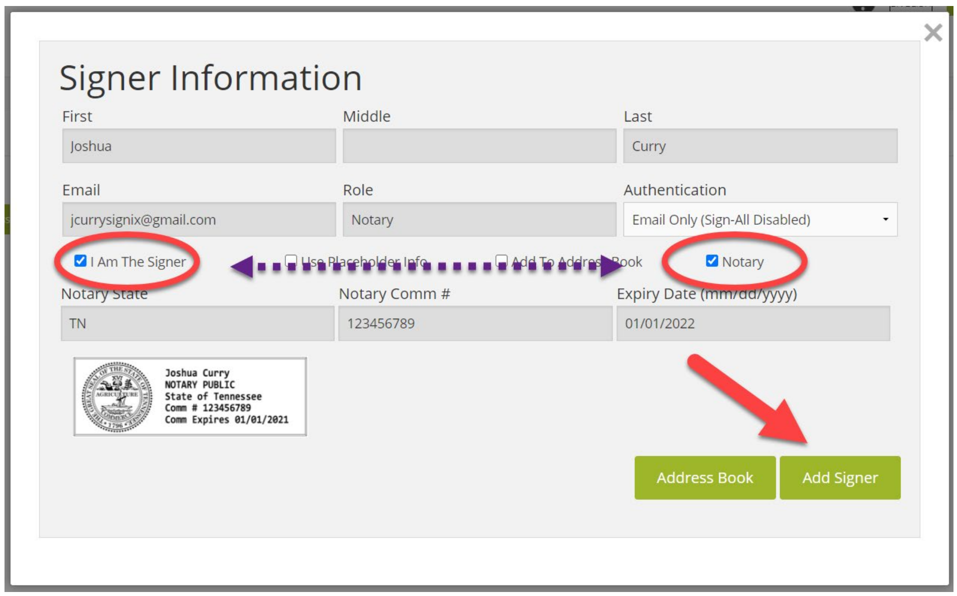
2. The notary will first enter in the client/principal/witness’s info, providing first name, last name, and email address. If the notary needs to authenticate the signer, under the Authentication tab select “**Knowledge-Based Authentication (KBA) w/ID Verification**” Then check the “**Ask the Signer**” checkbox when it asks for SSN and DOB. **[NOTE 1][NOTE 2]** Then click “**Add Signer.**”
   NOTE 1: If the notary has personal knowledge of the signer select “**Email Only**” for authentication. This will skip steps 7-10 of the Client Meeting instructions below.
   NOTE 2: If the transaction will be done in-person with physical identity credentials shown to the notary select “**Email Only.**” This will skip steps 7-10 of the Client Meeting instructions below.



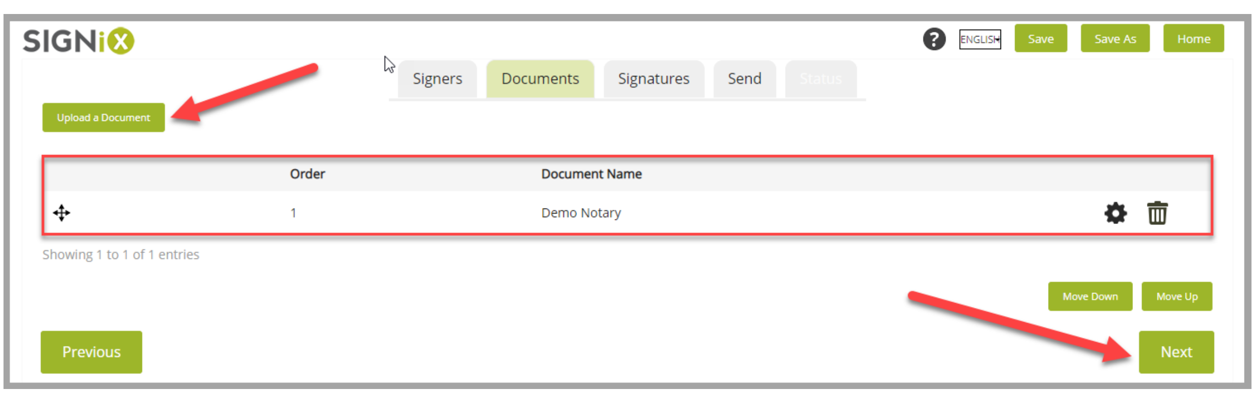
3. If any additional parties (other than the Notary) need to be added to the transaction, select “**Add New Signer**” and repeat step 2.



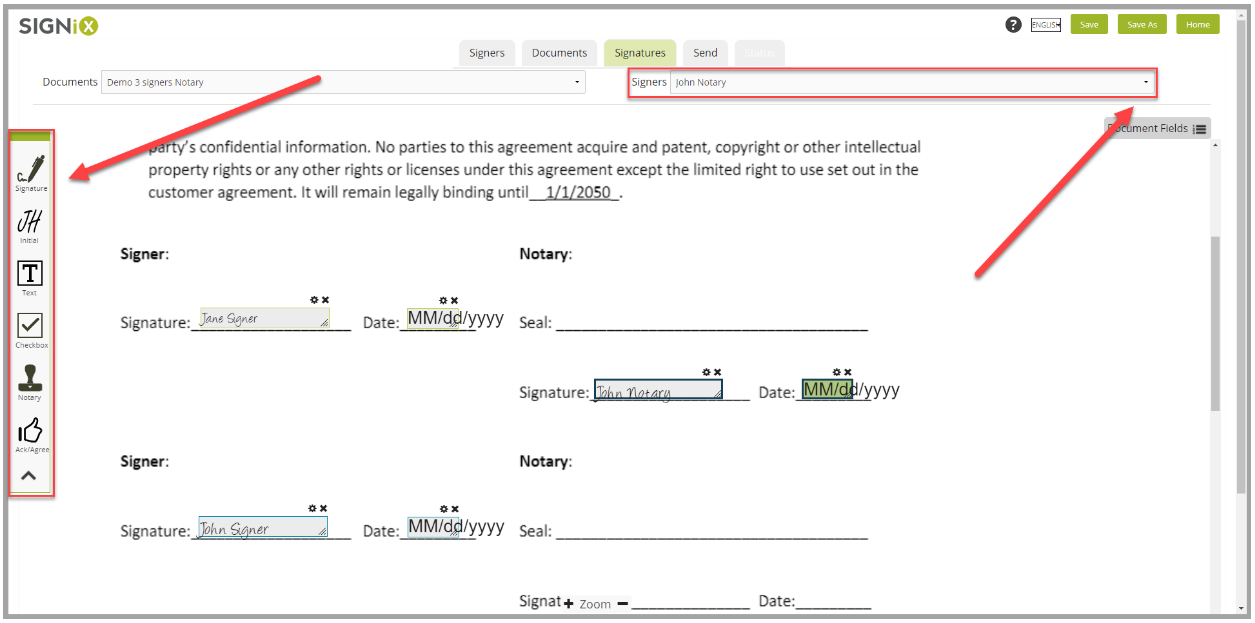
4. To add the notary (yourself) as a signer, select “**Add New Signer**” and instead of manually entering your information, you must always select “**I am the Signer**” to have your first name, last name, and email address automatically entered. Next, check the “**Notary**” box for your notary information to be added automatically. Authentication should be left on the default option, “**Email Only.**” Then click “**Add Signer.**” The notary must always be the last signer in the order.



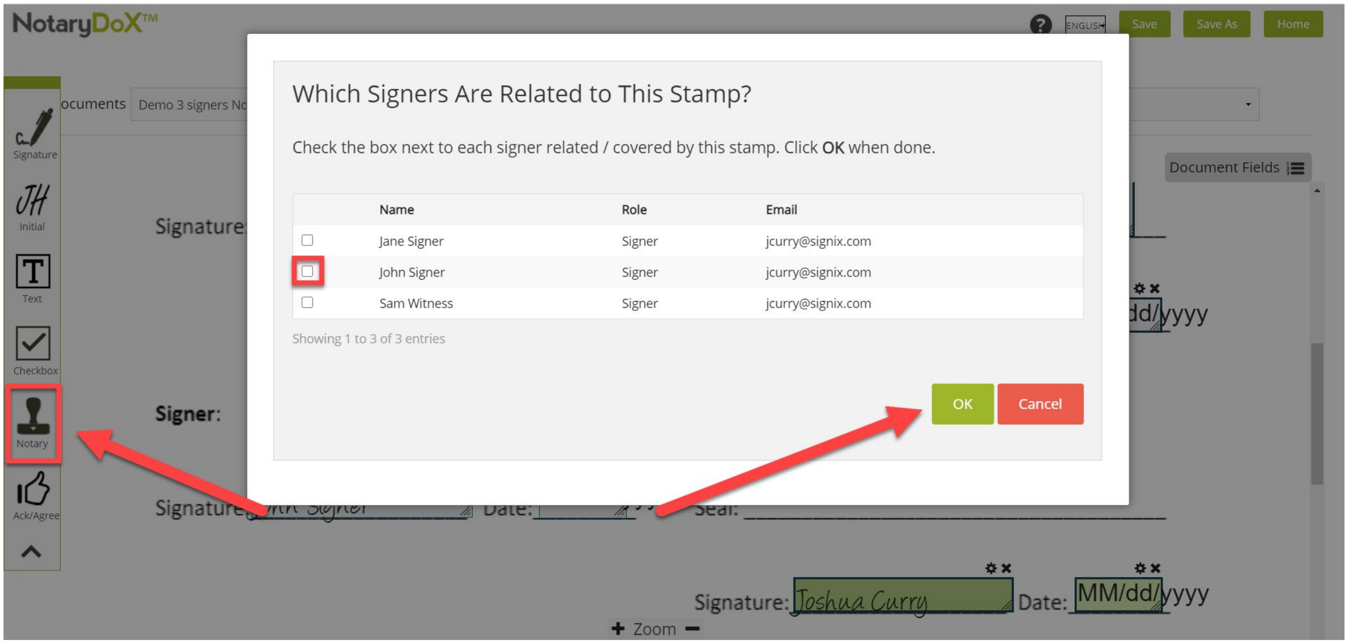
5. Once all parties have been added, click “**Next**” at the bottom of the screen, or select the “**Documents**” tab at the top of the screen to advance to the next step.
6. Select “**Upload a Document**” and choose a PDF document on your computer to upload. There is a 10MB max file size per document. Repeat this process for any additional documents required within this transaction. There is no limit on the number of documents you may upload.



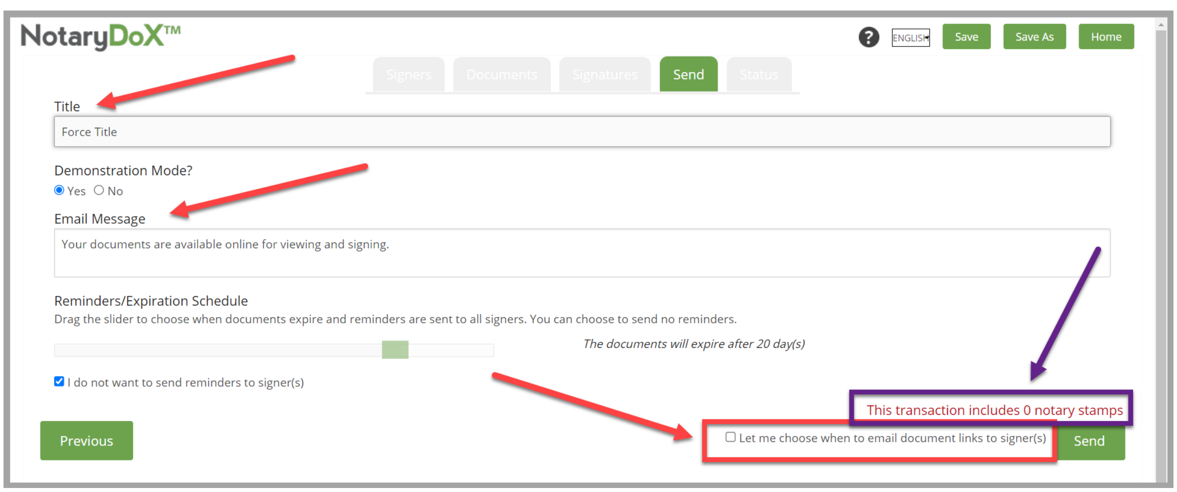
7. Click “**Next**” at the bottom of the screen or select the “**Signatures**” tab at the top of the screen to advance to the next step.
8. Next, you will add tasks, also known as tags or fields, for the signers and notary to perform on the document(s) you have just uploaded. To add these tasks, drag and drop the required task from the tool bar on the left side of the screen onto the document. These task fields can be repositioned, resized, or deleted. To learn more about how tagging works, click here. When finished assigning tasks for one person, select the next party in the drop-down menu titled “**Signers**” at the top of the page. Repeat this process for every signer. *Each time a notary’s signature is placed on the document, you can also add a corresponding seal from the tool bar, as long as the notary’s signature field is selected.*



9. If you have multiple signers/principals/witnesses, each time you place the Notary Stamp task on a document, it will ask you “**Which Signers Are Related to This Stamp?**”. Select the signer(s) relating to each stamp and click “**OK**”.

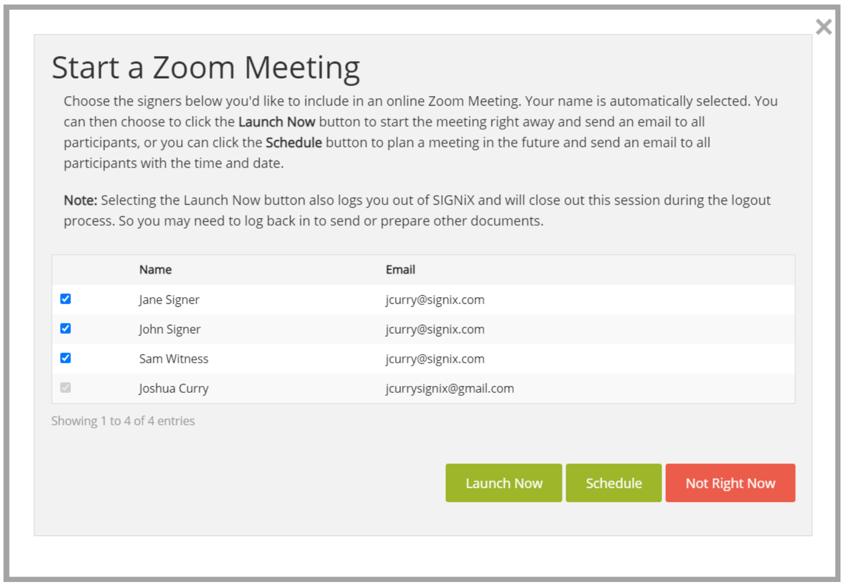


10. When finished tagging, select the “**Send**” tab at the very top of the screen to advance to the next step or click “**Next**” button at the very bottom of the screen using the outer most scroll bar.
11. Edit the Transaction Title and Email Message as desired. We always recommend selecting the “**Let me choose when to email this document links to signer(s)**” to hold the email to the first signer until you are ready to send it out. This will prevent signers from signing the document before you meet with them.
    a. This is also where you can create a Demo Transaction, which is done by selecting “Yes” for the **“Demonstration Mode”** option below the Title. A Demo Transaction will allow you to practice using the system without being charged. To learn more about Demonstration Mode, click here.



12. Click “**Send**” at the bottom right side of the screen to start the transaction. Make sure the transaction includes the expected number of stamps prior to sending, it will appear in red text above the button.

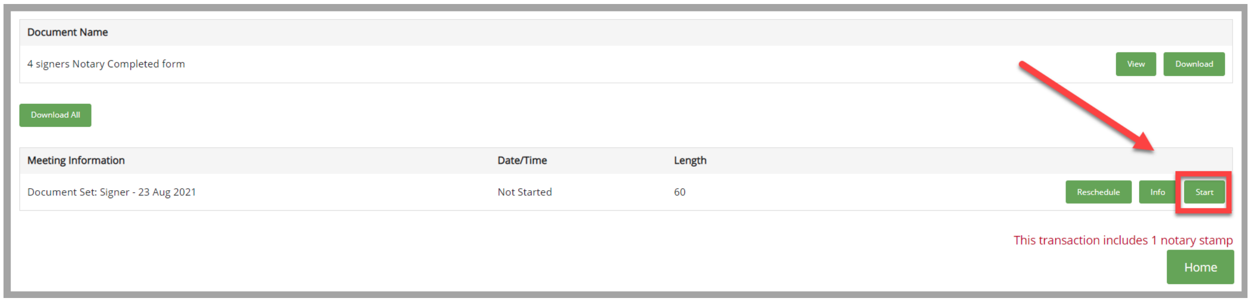
13. After the transaction has been started, a "Start Zoom Meeting" box will appear where you can "**Schedule"** a time for the online video meeting. Or if you are meeting right away, you can select **"Launch Now"** to start Zoom immediately. **[NOTE 3]** Both of these options will send an email notification to all parties with a link to join the meeting. **[NOTE 4]**
    NOTE 3: Only 1 video meeting is allowed per each transaction. If a transaction is not completed before the meeting is ended by the notary, then a new transaction must be created, and you will start over with step 1 again.
    NOTE 4: If the notarization will be done in-person, choose the "**Not Right Now**" and then "**In-person"** buttons instead.

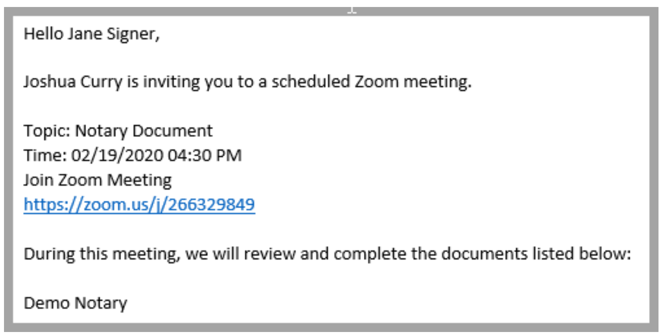


Client Meeting:

1. The Zoom meeting can be started by either using the link in the meeting email the notary was sent, or by clicking “**Start**” under the “Meeting Information” section on the transaction “Status” screen. The meeting will be automatically recorded, but the recording may be paused or stopped if necessary. To learn more about the SIGNiX/Zoom integration, click here.

For remote online notarizations, state laws require these meetings to be recorded.




Hello Jane Signer,

Joshua Curry is inviting you to a scheduled Zoom meeting.

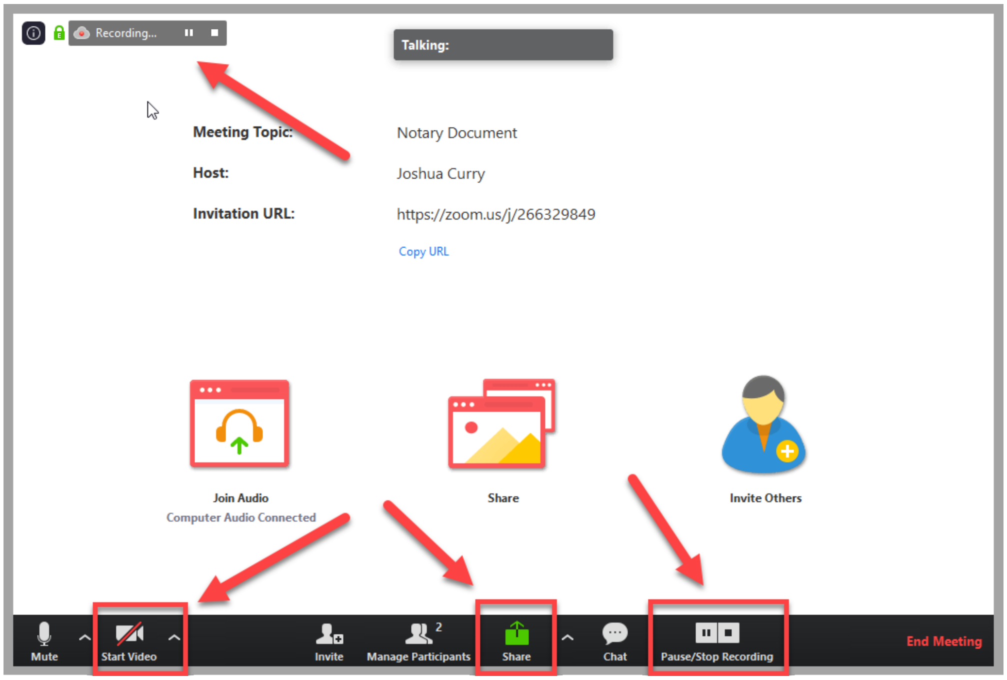
Topic: Notary Document
Time: 02/19/2020 04:30 PM
Join Zoom Meeting
https://zoom.us/j/266329849

During this meeting, we will review and complete the documents listed below:

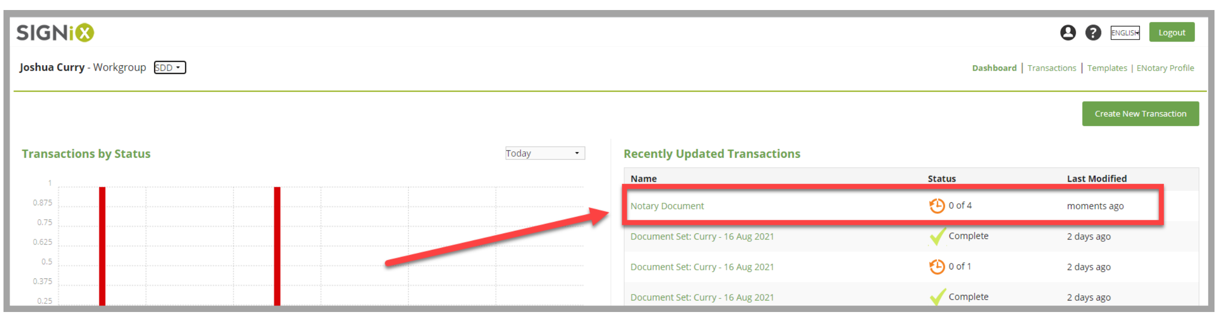
Demo Notary

2. To start the video, ensure a webcam is connected to your computer. At the bottom left side of the Zoom application, there will be a “**Start Video**” button. The signer(s) must also have a working webcam or smart phone camera for the transaction to be legal. *Make sure they understand how to share their screen using the green “Share” button at the bottom of the meeting application.*

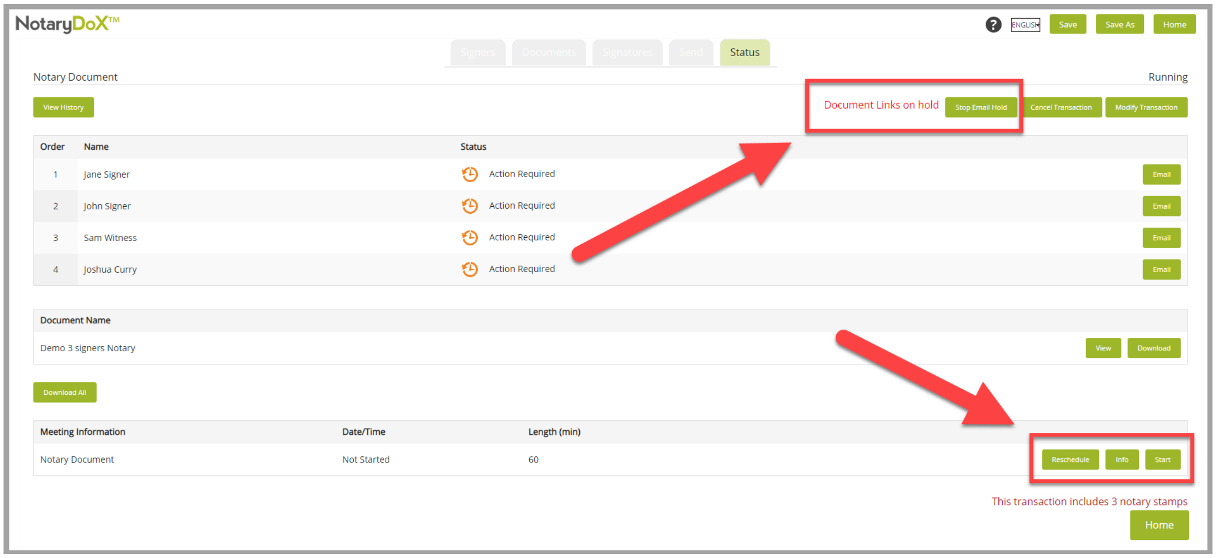
If they are unable to get their microphone or camera working, or the principal’s audio/video is not of sufficient quality to authenticate the signer, the notary should notify the principal(s) that they cannot proceed with the transaction and to contact the appropriate party for next steps.



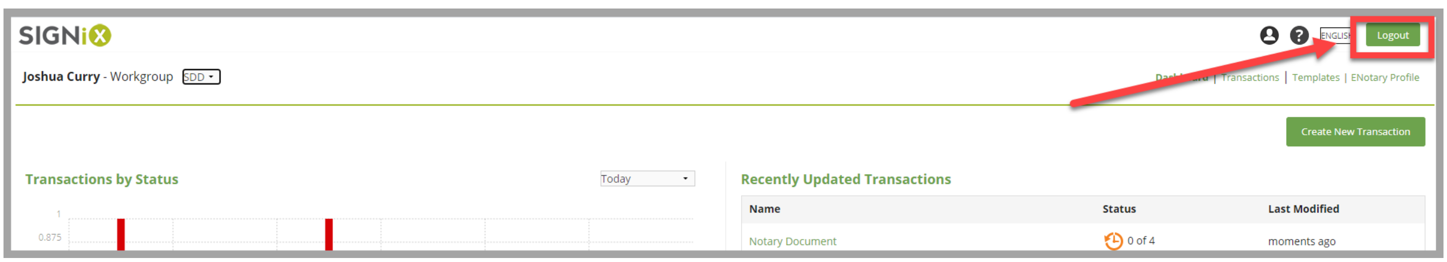
3. For a sample script of the entire process, [click here](#).
4. Once you have all parties on the Zoom call and are ready to proceed, you can log back into the SIGNiX "**Document Center**" and open the transaction.



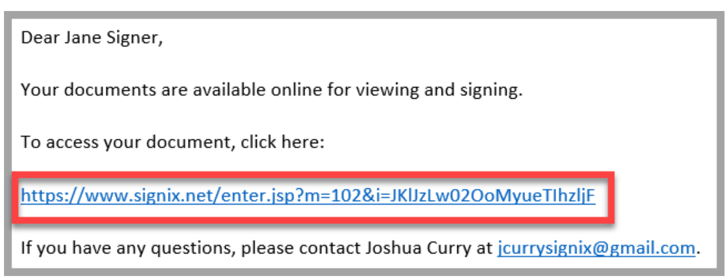
5. On this "**Status**" page of the transaction, click "**Stop Email Hold**" which will immediately send an email to your first signer with a unique URL for them to use to access the documents and sign. **[NOTE 5]**
NOTE 5: If you need to reschedule or resend information for the Zoom meeting, you can also do that from this page. *Do not share your own Zoom link with your signers, instead you will use the "Info" button here to be able to copy a shareable link to send to your signers yourself.*



Make sure to "Logout" once you have sent out the invite to the Zoom meeting. Failure to do so may result in locking you out of the platform, error messages, or corrupting the documents.



6. The signer will receive an email from SIGNiX with a link to access their documents. Have them click the link to open a SIGNiX tab in their browser.


Dear Jane Signer,

Your documents are available online for viewing and signing.

To access your document, click here:

https://www.signix.net/enter.jsp?m=102&i=JKlJzLw02OoMyueTlhzljF

If you have any questions, please contact Joshua Curry at jcurrysignix@gmail.com.

If the signer needs to complete authentication, proceed to step 7. If you selected "**Email Only**" authentication for the signer, skip ahead to step 11.

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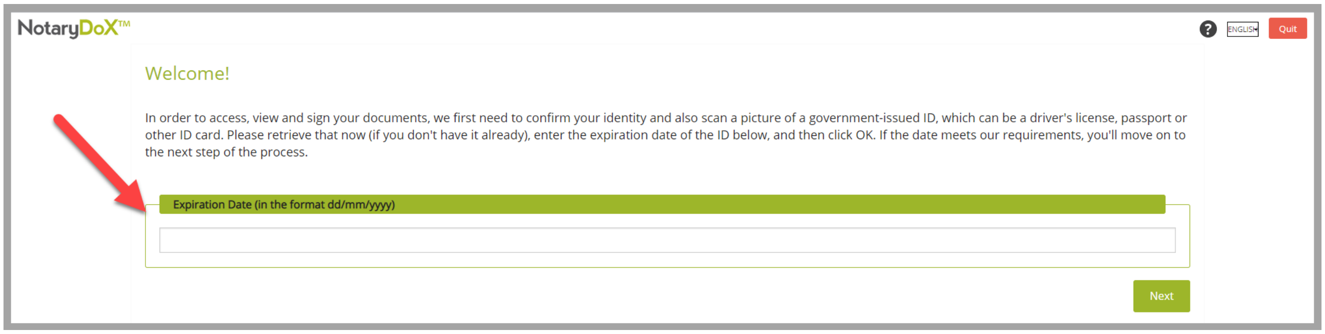
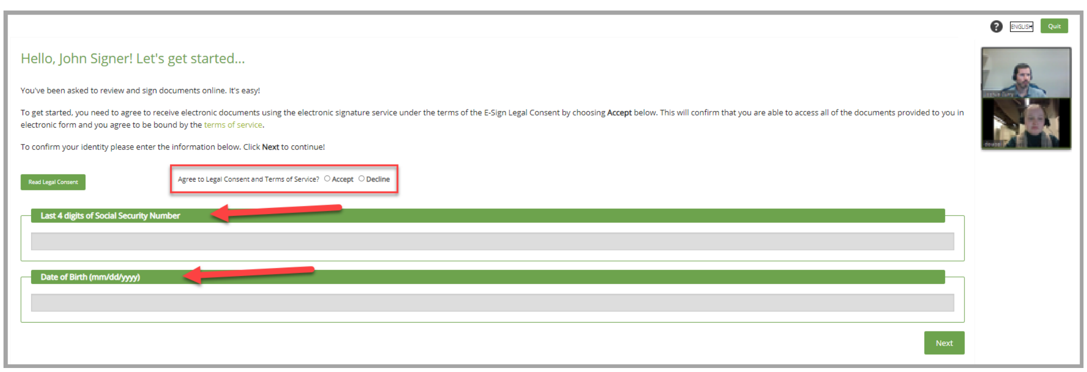
7. The signer will first be prompted to enter in the expiration date of whichever ID they will be using to authenticate themselves. This can be a Passport, Driver's License, or State ID.



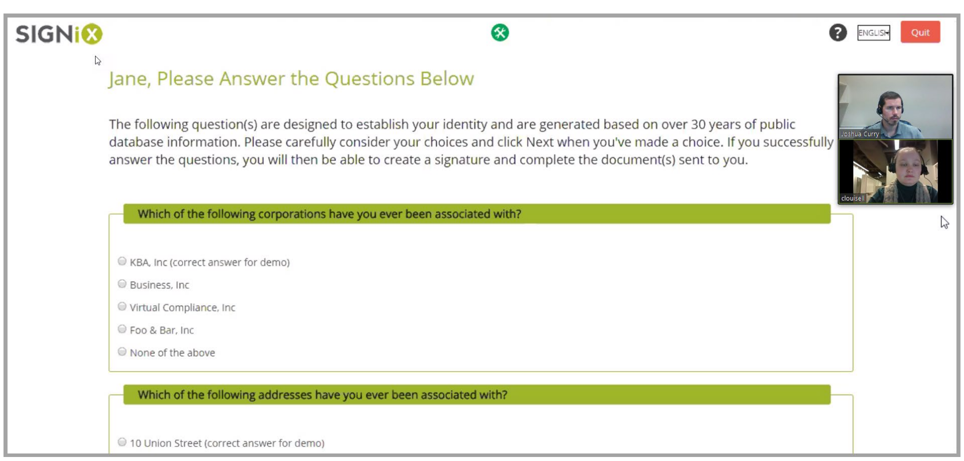
8. Next, the signer will arrive at the login screen. During login, they will accept legal consent to use e-signature, and if they need to be authenticated, they will enter the last 4 digits of their social security number and date of birth. Then they must complete the multiple-choice Knowledge-Based Authentication (KBA) questions <u>before</u> they share their screen.

<u>The KBA questions will contain personal information that should not be shared or recorded, so make sure your signer does not share their screen with you through the Zoom meeting while on this page.</u>

For additional information about KBA process, [click here].

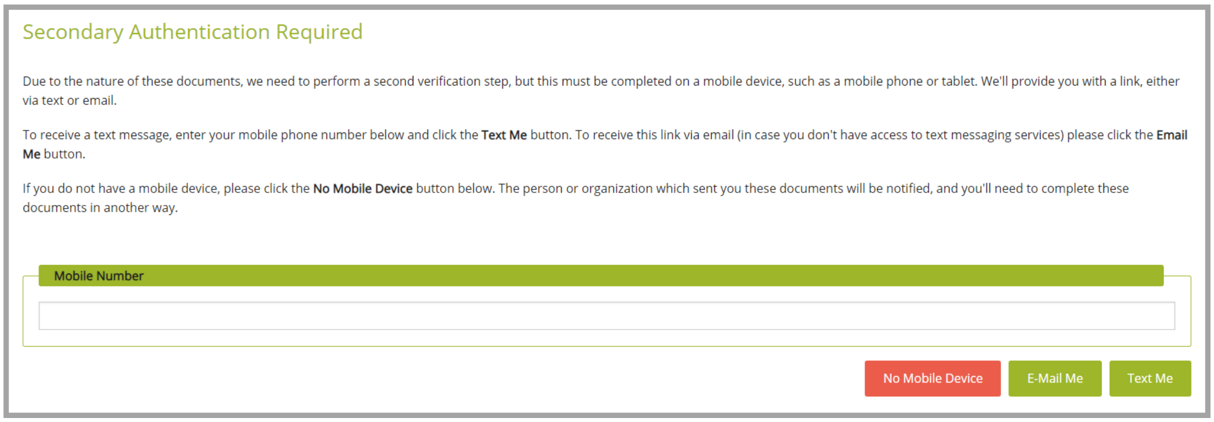


s

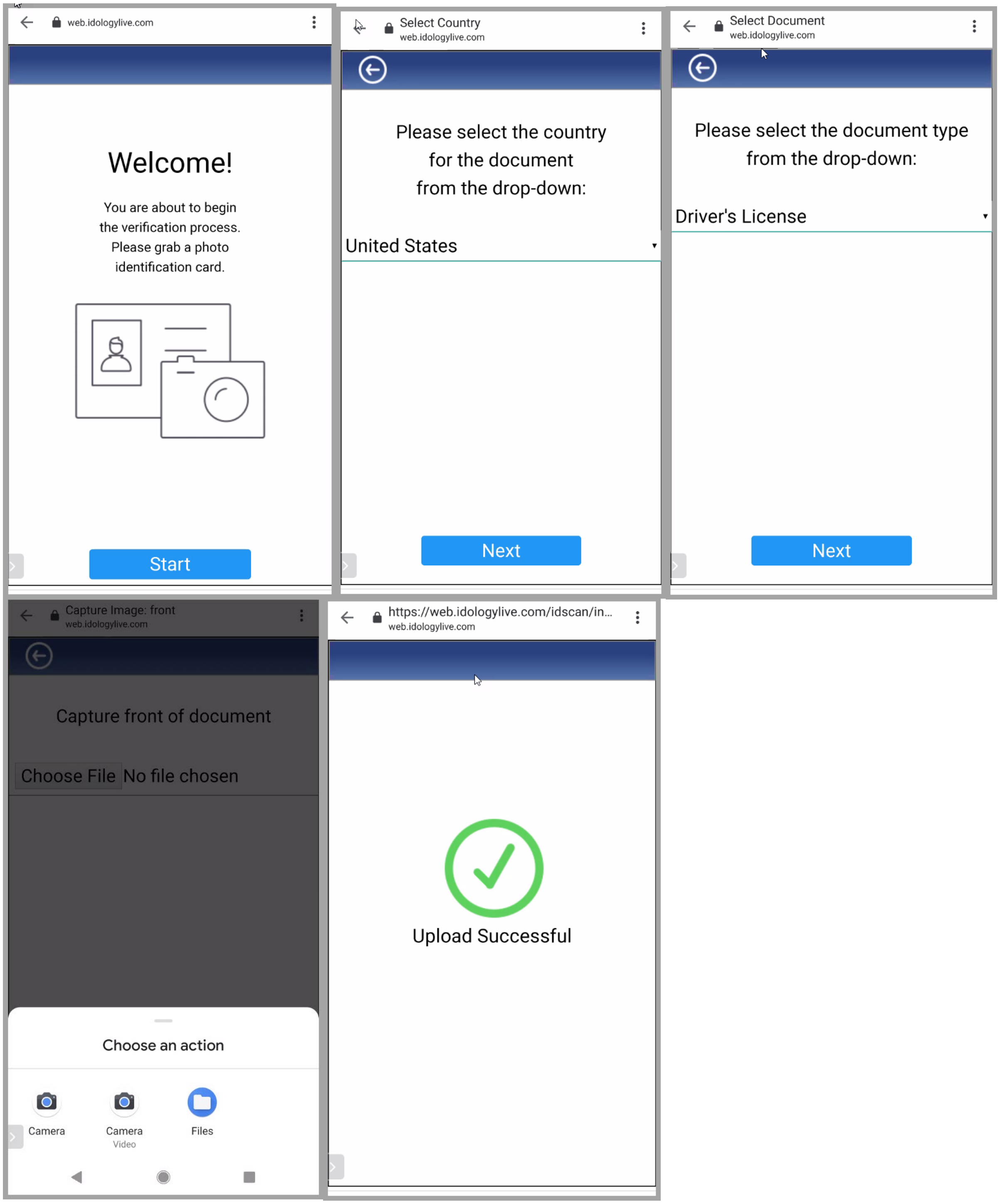


(You should not be shown the screens above, but they are displayed here for reference)

9. Next your client will be asked to enter their phone number. They will be texted or emailed a link which should be opened on a mobile device. **[NOTE 6]** They will want to leave this screen up, and not close it out, while performing the next step.
   NOTE 6: The text option will only work for US phone numbers. If your signer does not have a US phone number, have them choose to be emailed the link to their mobile device.



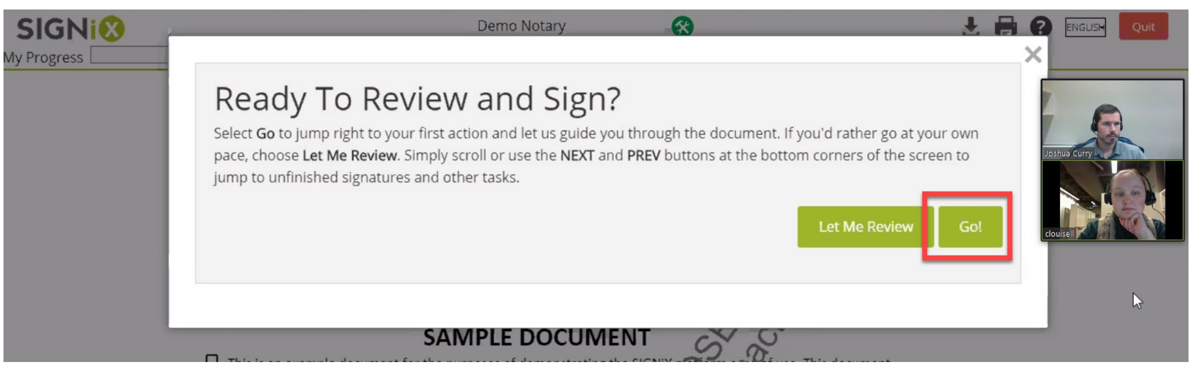
10. When the client clicks the link on their phone it will open a browser to take pictures of the front and back of their ID. See images below. Once complete, they will be directed back to the original page they answered their KBA questions on, which should still be open and waiting for them.



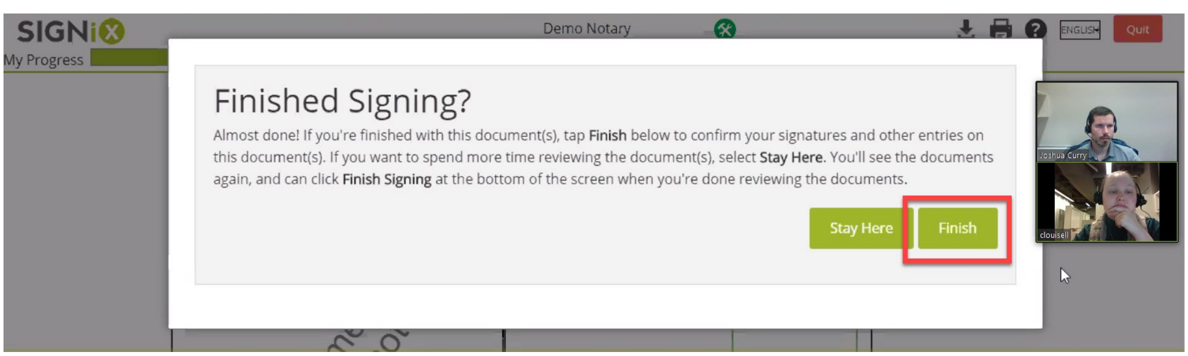
11. Once the signer has completed the ID pictures, they can then return to SIGNiX and share that screen with you in the Zoom meeting. The signer will click the green “**Share**” icon in the Zoom meeting.
12. Next, the signer will need to set up a password. They will use this password in the future both to login and sign documents, and to review previously signed documents. They can also choose a font they would like their signature to appear in.

Signers should share their screen for steps 13 and 14.

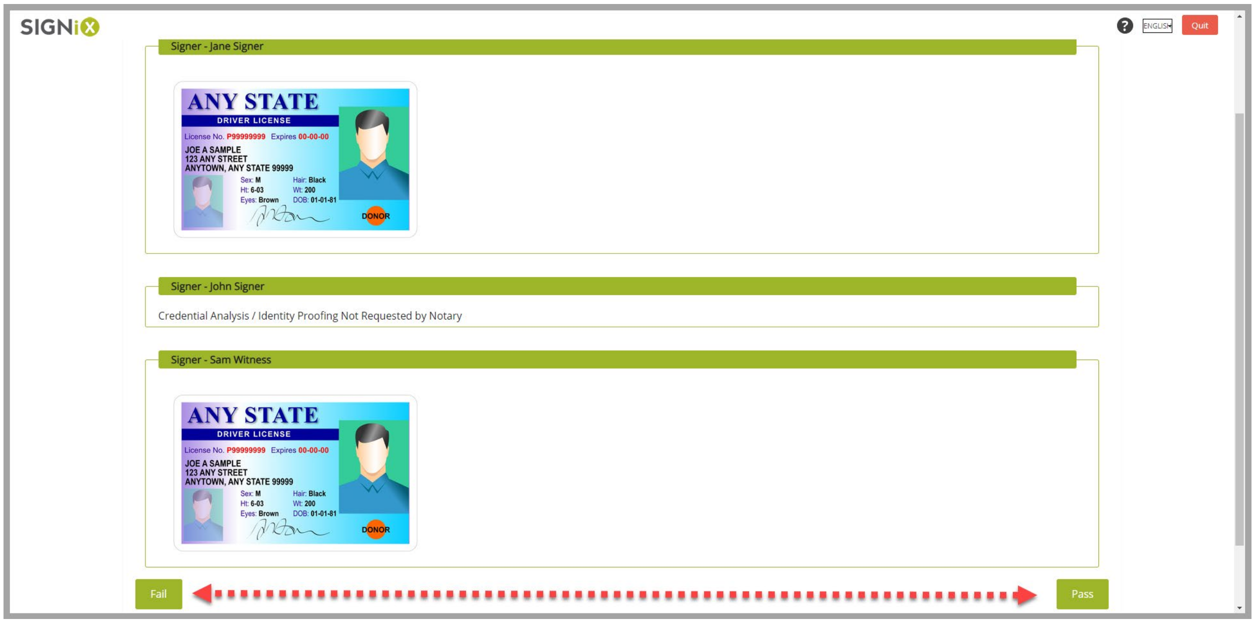
13. When brought to the document, the signer can select "**Go**" or "**Let Me Review**" on the "Ready to Review and Sign?" screen. The signer will then click on the "**Sign**" or "**Initial**" flags on each task to place their signature or initials in the indicated places. The system will automatically prompt them to finish after they have completed all tasks assigned to them.



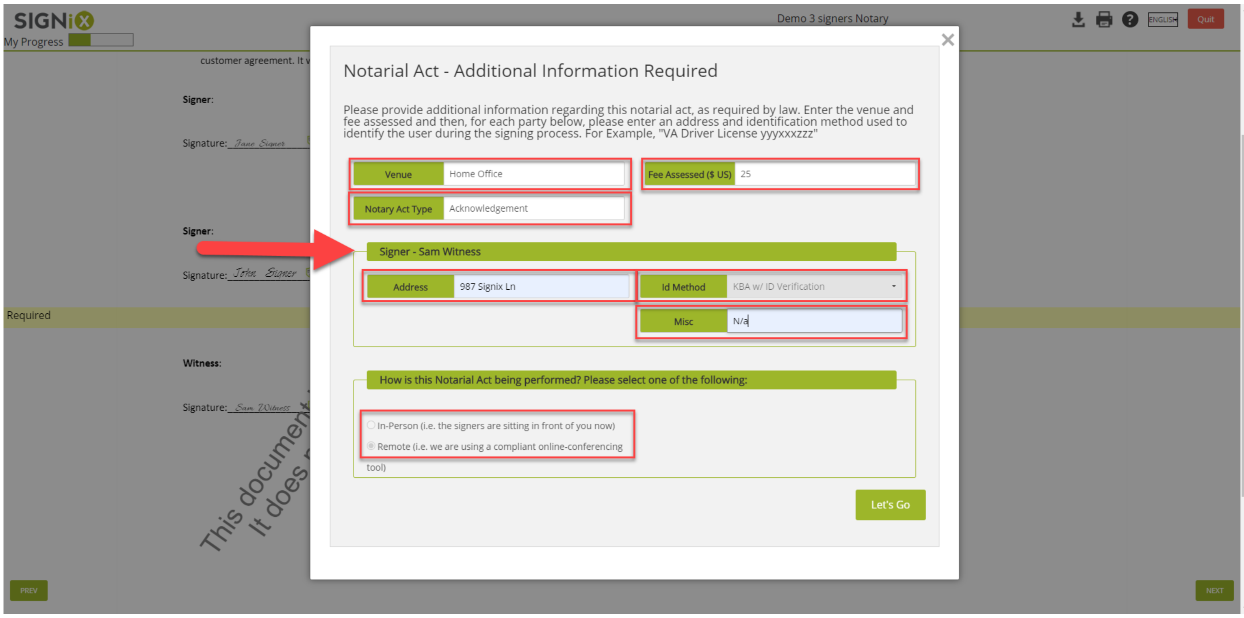
14. Once the signer selects **"Finish"** in the previous step, the next party (additional principal, witness, or notary) will then receive an email with a link to sign exactly like the first signer's email. Make sure to ask the signer to close out of their SIGNiX tab, and stop their screen sharing. Each non-notary signer will repeat steps 6-14. When it is your turn as the notary to sign, continue to step 15.



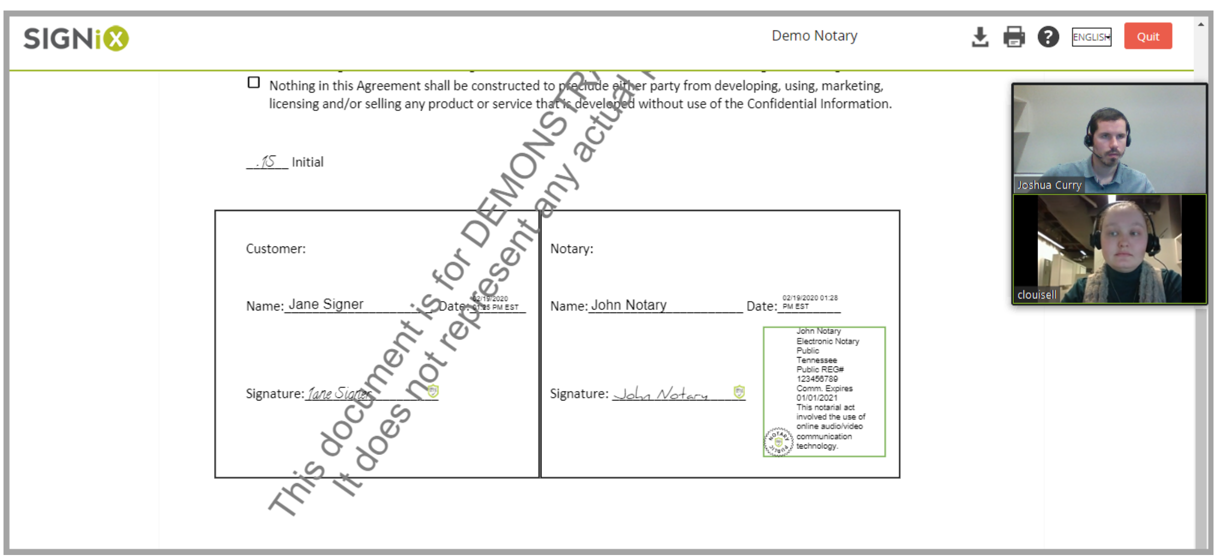
15. After logging in with their password, the notary will then share their screen in Zoom and the first step you will need to complete will be to compare the ID on the screen to your client's webcam image. Once you confirm that is the same person, you will select "**Pass**" to continue. Otherwise, you'll select "**Fail**" to terminate the transaction.



16. The notary will then go through the signing process in the same way, sharing their screen before notarizing the document. They will confirm with all signers that the signatures are theirs: <u>Example:</u> *Do you acknowledge the signature that appears here to be yours? And was it given of your free act and deed?*
17. When signing a field associated with a notary stamp, the notary will get a pop-up "**Notarial Act – Additional Information Required**". Complete each field, which will be recorded in the eNotary journal.



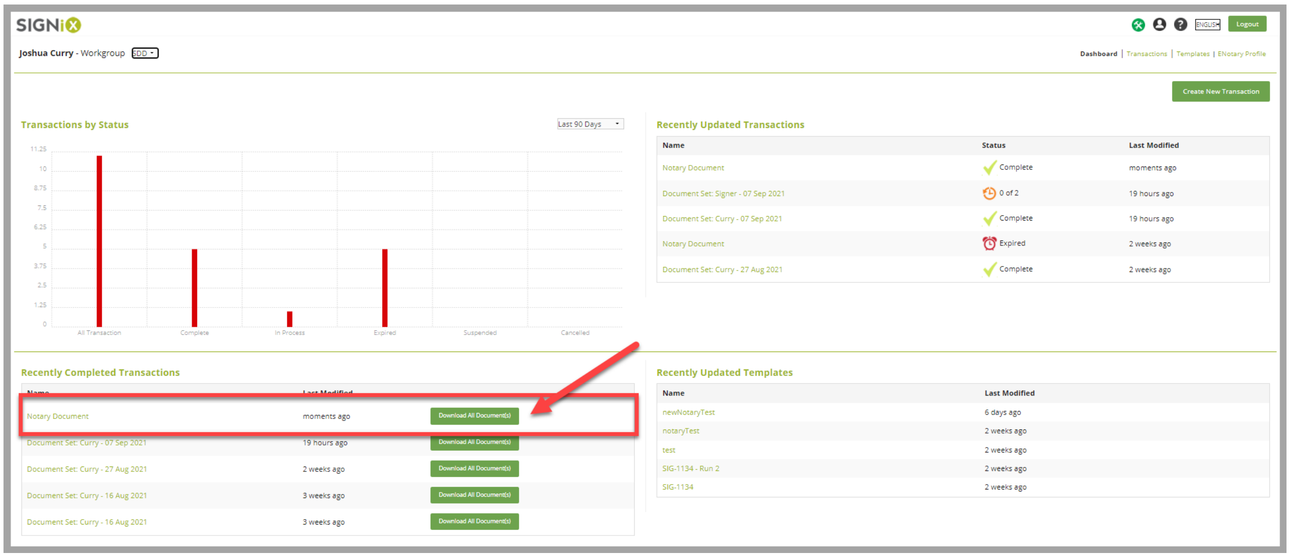
18. Once complete, the notary will select “**Finished Signing.**” **[NOTE 7]** The notary may then review the completed document with the client, showing both signatures and the seal(s) by clicking “**Review**” on the “Thanks For Signing Online!” page. This completed document can also be viewed from the email link that will be sent to all parties after the transaction has been fully completed.
    NOTE 7: Notary seals will not appear during the signing process but will appear after signing when viewing the completed document.



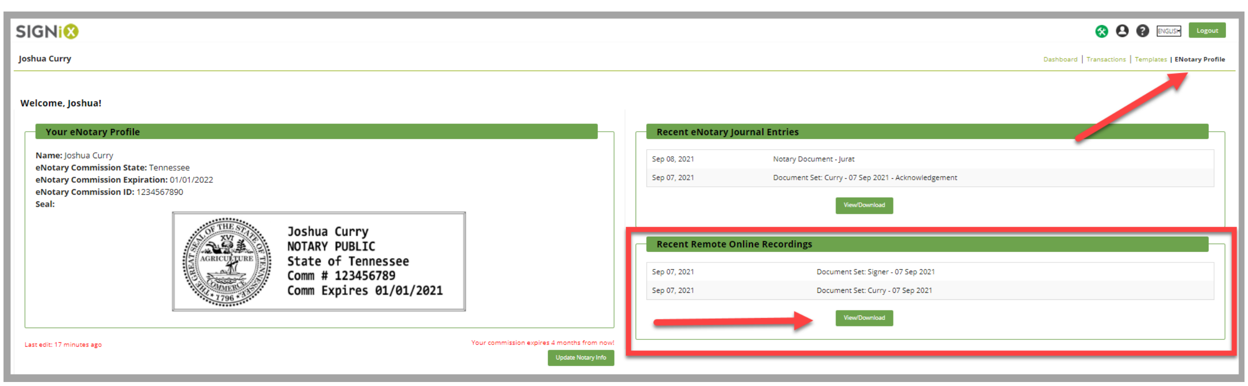
19. When concluding the video meeting, the notary should inform the signers that they will receive an email with a link for them to re-access the document to view / download / print. Then the notary can click on “**End Meeting**” to terminate the Zoom meeting once all questions have been answered.

Post-Meeting:

As the notary you are required to download and maintain copies of the documents, audit trail and video recording for your state required minimums**. SIGNiX will delete these files from the platform after 90 days.**

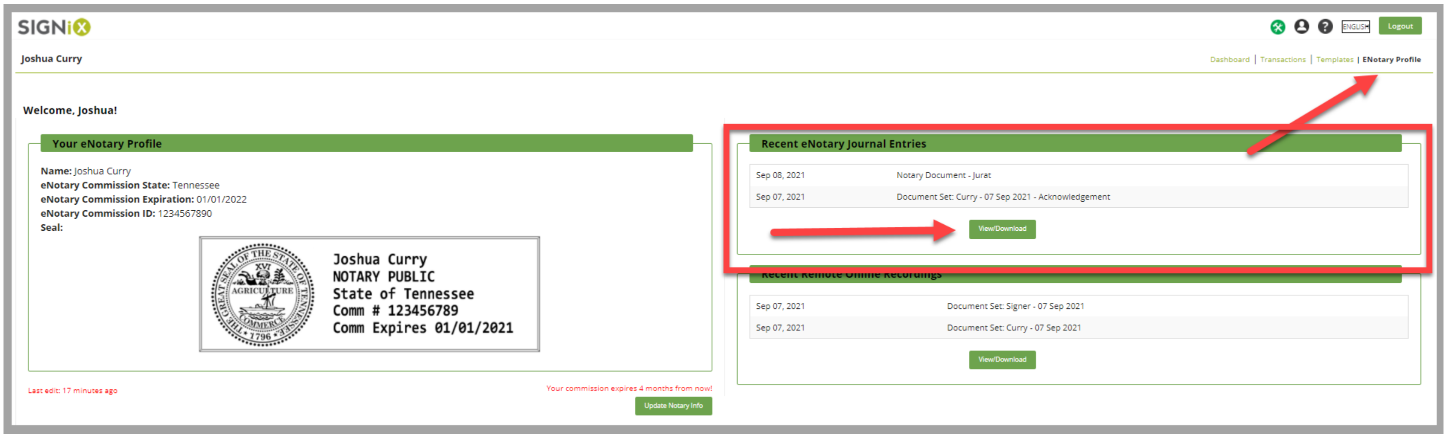


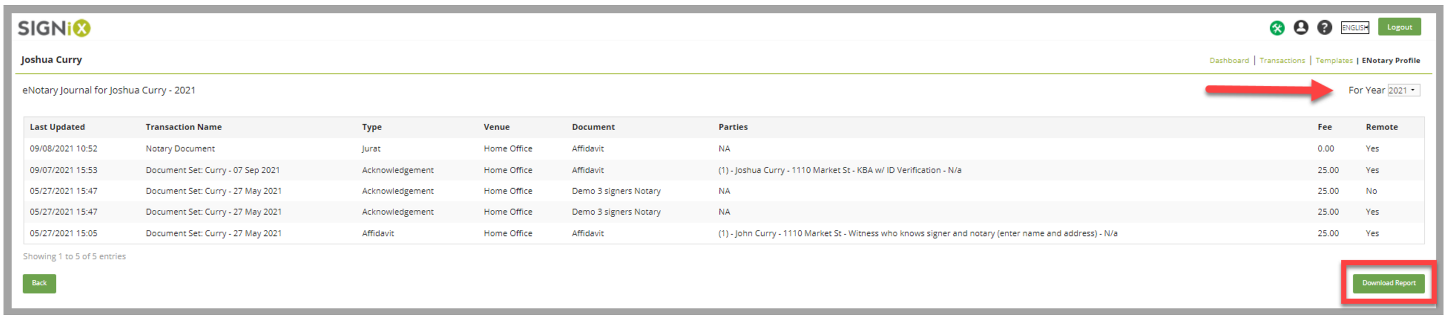
2. Then go to your "**ENotary Profile**" and click "**View/Download**" video meeting under the "**Recent Remote Online Recordings**" section. Then download the video file associated to the transaction.



<u>Note that it may take several minutes for the video to become available for download.</u>

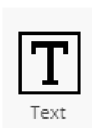
3. On the "**ENotary Profile**" page you can also download an updated eNotary Journal. Select "**View/Download**" to see all recent transactions, and then select "**Download Report**" to download as a PDF. You can select the year in the upper right hand corner.

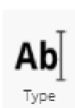

SIGNiX
Logout
Joshua Curry
Dashboard | Transactions | Templates | ENotary Profile
Welcome, Joshua!
Your eNotary Profile
Name: Joshua Curry
eNotary Commission State: Tennessee
eNotary Commission Expiration: 01/01/2022
eNotary Commission ID: 1234567890
Seal:
Joshua Curry
NOTARY PUBLIC
State of Tennessee
Comm # 123456789
Comm Expires 01/01/2021
Last edit: 17 minutes ago
Your commission expires 4 months from now!
Update Notary Info
Recent eNotary Journal Entries
Sep 08, 2021 Notary Document - Jurat
Sep 07, 2021 Document Set: Curry - 07 Sep 2021 - Acknowledgement
View/Download
Sep 07, 2021 Document Set: Signer - 07 Sep 2021
Sep 07, 2021 Document Set: Curry - 07 Sep 2021
View/Download


SIGNiX
Logout
Joshua Curry
Dashboard | Transactions | Templates | ENotary Profile
eNotary Journal for Joshua Curry - 2021
For Year 2021
Last Updated Transaction Name Type Venue Document Parties Fee Remote
09/08/2021 10:52 Notary Document Jurat Home Office Affidavit NA 0.00 Yes
09/07/2021 15:53 Document Set: Curry - 07 Sep 2021 Acknowledgement Home Office Affidavit (1) - Joshua Curry - 1110 Market St - KBA w/ ID Verification - N/a 25.00 Yes
05/27/2021 15:47 Document Set: Curry - 27 May 2021 Acknowledgement Home Office Demo 3 signers Notary NA 25.00 No
05/27/2021 15:47 Document Set: Curry - 27 May 2021 Acknowledgement Home Office Demo 3 signers Notary NA 25.00 Yes
05/27/2021 15:05 Document Set: Curry - 27 May 2021 Affidavit Home Office Affidavit (1) - John Curry - 1110 Market St - Witness who knows signer and notary (enter name and address) - N/a 25.00 Yes
Showing 1 to 5 of 5 entries
Back
Download Report

Different Field Options

All fields default to being mandatory but can be changed by selecting the gear symbol and deselecting mandatory. All fields can be resized, moved around, or deleted.

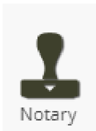




- 

This versatile field is often changed to be optional. If you require and either/or option such as a Yes/No, you can change this box to be a Radiobutton by selecting the gear icon and checking “RadioButton”. This will provide you 2 options where the signer can only select one of the other. This can be expanded to even more options by selecting the gear symbol again.


Ack/Agree


Notary

Anchor Points in Tagging

The first tagged field placed on every document for each signer must be a signature or initial field. These are referred to as “anchor points” or AP. Each subsequently placed field after an anchor point will be associated with it and must be completed PRIOR to the signer completing the anchor point. For this reason, it is always best to start by placing an anchor point and working up, rather than down. For example:

If a document requires a checkbox, text field, initial, text field, signature in that order. We recommend tagging:

Fourth ☑ Fifth Text field

Third Initial

Second Text field First Signature (AP)

If a text non-AP field (checkbox, text field, etc) is placed after an anchor point, it still must be completed before the AP:

First Initial

Second Text field Third Signature (AP)

If a document is tagged in this manner, during the signing, the text field must be completed prior to the first AP (initial field).

Demonstration Mode:

Demonstration mode provides users the ability to test out the platform for free. This is espeshally important for notaries who need to be well versed in using the platform prior to meeting with a client. Using demonstration mode will change 3 things about the transaction.

- You will not be billed for the transaction by SIGNiX.
- If you selected KBA or KBA/ID authentication, fake authentication will be used. Your signers will not need to enter real SSN/DOB and the KBA and credential analysis process will be skipped
- The completed document will have a watermark across the document indicating it is not a legally binding document.

SIGNiX/Zoom integration

The Zoom integration into the SIGNiX platform allows notaries to use Zoom to meet virtually with their clients while using the SIGNiX platform. Things to understand regarding this integration:

- When the notary joins the Zoom meeting, the meeting is 'started'.
- Each SIGNiX transaction only allows for 1 Zoom meeting. If notary starts the meeting, and then it needs to be postponed for any reason, a new meeting must be used. There are 2 options to do this.
    - Create a new SIGNiX transaction with a new Zoom meeting link
    - Use your own video meeting platform to host the second meeting
- Notaries are not required to use Zoom as their video meeting platform. Any platform that is capable of capturing audio/video with a recording is acceptable. This may include, but not limited to: Microsoft Teams, Skype, Google Meet, Cisco Webex. To learn more about this process, click here.
- You can choose to pause or stop the recording as necessary, however make sure you are following state laws and guidelines for recording meetings.
- To watch a video on how to use Zoom, click here.

Knowledge based authentication (KBA) process

- Clients who are asked to complete KBA authentication must have 5 years of credit history for the system to generate enough questions to them. If there is insufficient credit history for the client, a black error message may appear.
- The KBA process does not impact credit scores whatsoever.
- The client should not share their screen while completing this process.
- Clients will have 2 minutes to complete the KBA process and must pass with an 80% or higher rate.
- If they cannot pass the KBA questions with correct answers after 2 attempts, they will be locked out from attempting further for 24 hours. You will be able to reuse this transaction, asking your clients to use the same email link they already received.