



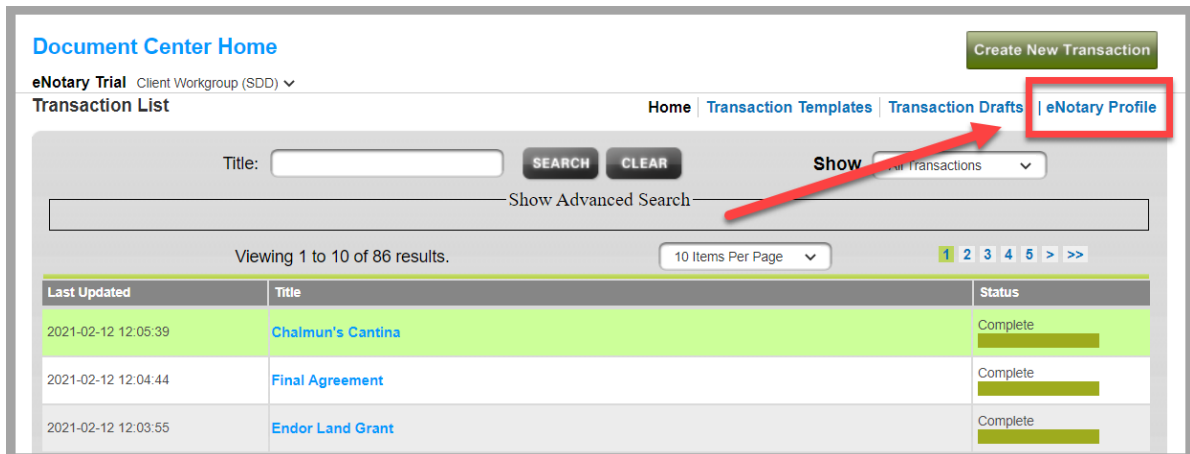
Steps for a Notary to Create and Complete a RON/eNotary Transaction

*** All text in green only applies to In-Person E-Notarizations ***

Need to attend a training to ask questions or to see this process live? Contact customersupport@signix.com

Notary Information:

1. Start by logging into the Document Center Home screen and selecting “eNotary Profile” below the Create New Transaction Button.



2. At the bottom of the screen, click on the “Update Notary Info” button.



3. This will allow you to enter/update your notary commission information. Input “**Commission State**”, “**Commission Expiration**”, “**Commission ID**”, and “**Seal**” a note you cannot leave any of these fields blank. To upload your seal, upload a PNG or JPEG image file less than 500KB in size. Depending on your state laws, this can be a photograph of your ink notary stamp. 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

Document Preparation:

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

Document Center Home

eNotary Trial Client Workgroup (SDD) ▾

Transaction List

Home Transaction Templates Transaction Drafts eNotary Profile

Title: SEARCH CLEAR Show All Transactions ▾

Show Advanced Search

Viewing 1 to 10 of 86 results. 10 Items Per Page ▾ 1 2 3 4 5 > >>

Last Updated	Title	Status
2021-02-12 12:05:39	Chalmun's Cantina	Complete
2021-02-12 12:04:44	Final Agreement	Complete
2021-02-12 12:03:55	Endor Land Grant	Complete

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.

Signer Information

First: Jane Middle: Last: Signer

Email: jcurry@signix.com Role: Signer Authentication: Knowledge-Based Authentication (KBA) w/ID Verification

☐ I Am The Signer ☐ Use Placeholder Info ☐ Add To Address Book

SSN: ***** DOB (mm/dd/yyyy): 00/00/0000

Add Signer

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

Signers

Order	Role	Name
1	Signer	Jane Signer

Showing 1 to 1 of 1 entries

Add New Signer CC List Address Book MassMailer

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.

Signer Information

First: Joshua Middle: Last: Curry

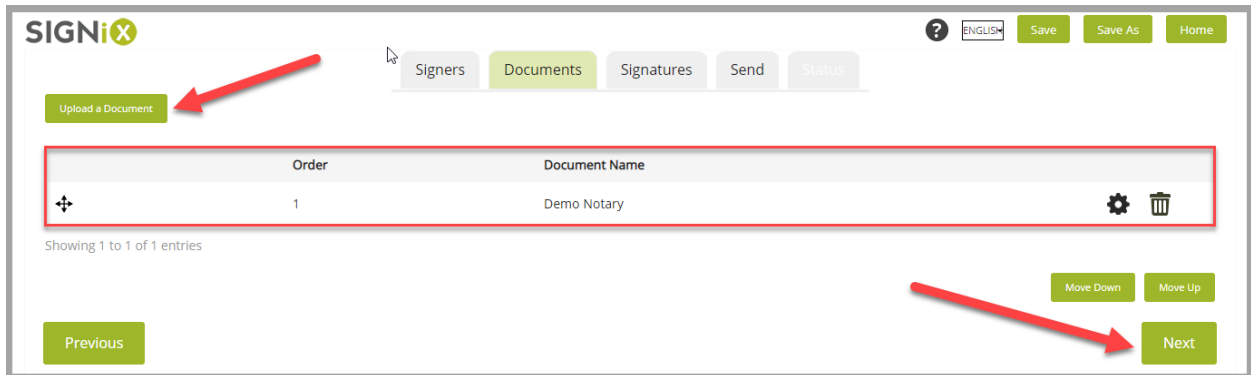
Email: jcurrysignix@gmail.com Role: Notary Authentication: Email Only (Sign-All Disabled)

☒ I Am The Signer ☐ Use Placeholder Info ☐ Add To Address Book ☒ Notary

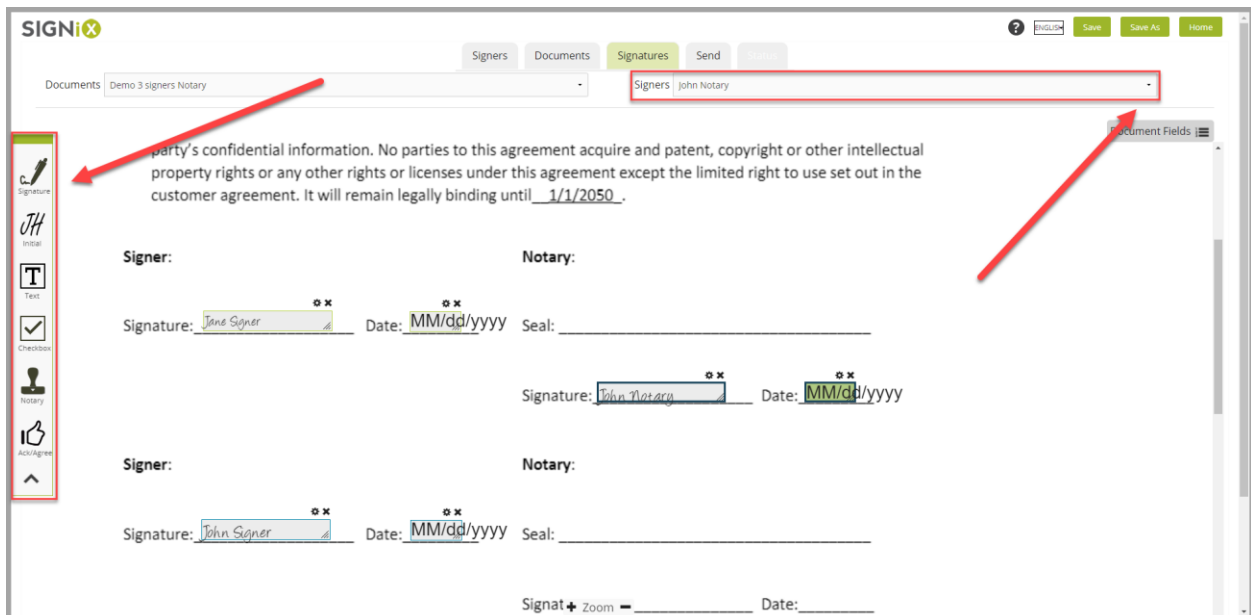
Notary State: TN Notary Comm #: 123456789 Expiry Date (mm/dd/yyyy): 01/01/2022

Add Signer

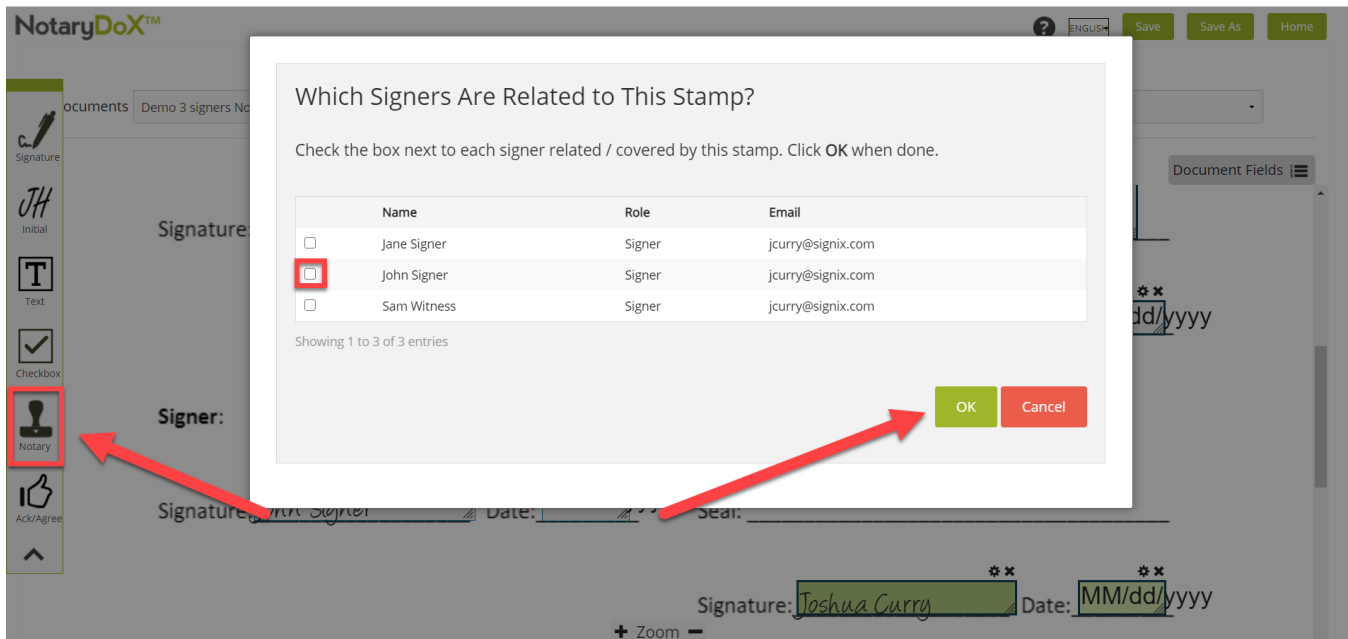
5. Once all parties have been added, click **"Next"** at the bottom of the screen, or select the **"Documents"** tab at the top of the screen to advance to the next step.
6. Select **"Upload a Document"** and choose a PDF document on your computer to upload. There is a 10MB max file size per document.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



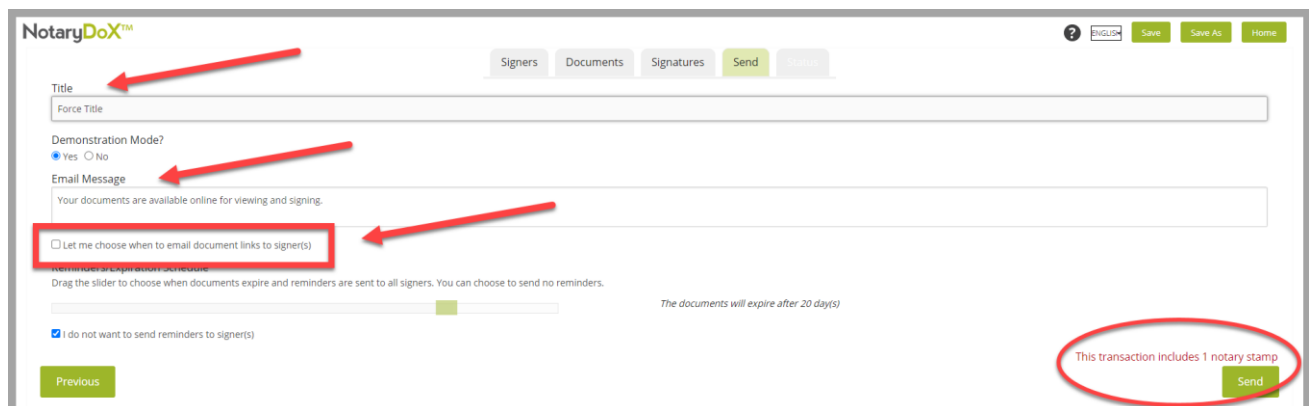
7. Click **"Next"** at the bottom of the screen or select the **"Signatures"** tab at the top of the screen to advance to the next step.
8. Next, you will add tasks (also known as tags or fields) for the signers and notary to perform on the document(s) you have just uploaded. To add these tasks, drag 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. 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 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 early 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.

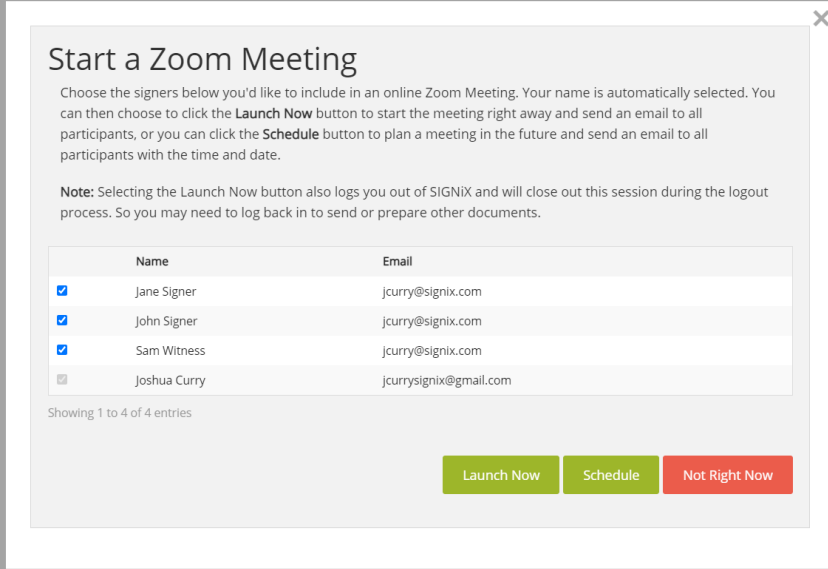


12. Click **“Send”** at the bottom right side of the screen to start the transaction. Make sure the transaction includes the expected number of stamps prior to sending, it will appear in red text above the button.

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.



Start a Zoom Meeting

Choose the signers below you'd like to include in an online Zoom Meeting. Your name is automatically selected. You can then choose to click the **Launch Now** button to start the meeting right away and send an email to all participants, or you can click the **Schedule** button to plan a meeting in the future and send an email to all participants with the time and date.

Note: Selecting the Launch Now button also logs you out of SIGNIX and will close out this session during the logout process. So you may need to log back in to send or prepare other documents.

	Name	Email
<input checked="" type="checkbox"/>	Jane Signer	jcurry@signix.com
<input checked="" type="checkbox"/>	John Signer	jcurry@signix.com
<input checked="" type="checkbox"/>	Sam Witness	jcurry@signix.com
<input type="checkbox"/>	Joshua Curry	jcurrysignix@gmail.com

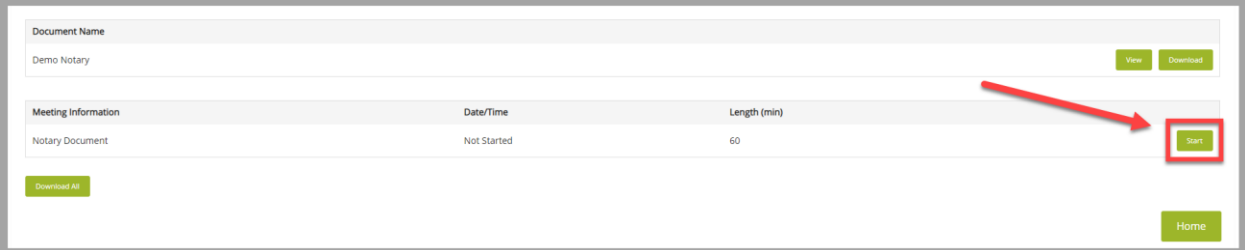
Showing 1 to 4 of 4 entries

Launch Now **Schedule** **Not Right Now**

Client Meeting:

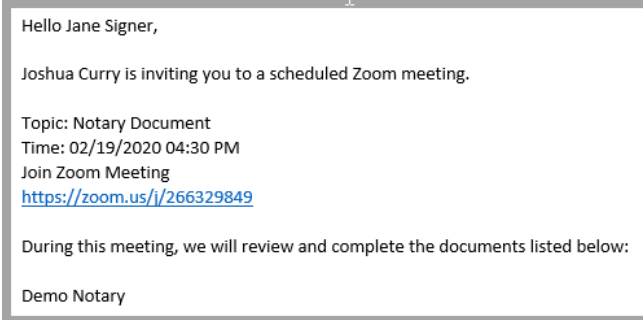
1. The Zoom meeting can be started by either using the link in the meeting email the notary was sent, or by clicking **“Start”** under the “Meeting Information” section on the transaction “Status” screen. The meeting will be automatically recorded, but the recording may be paused or stopped if necessary.

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



The screenshot shows a web interface for a notary transaction. At the top, there's a section for 'Document Name' with 'Demo Notary' and buttons for 'View' and 'Download'. Below this is a table titled 'Meeting Information' with columns for 'Date/Time' and 'Length (min)'. The table has one row: 'Notary Document', 'Not Started', '60'. To the right of this row is a red-bordered box containing a 'Start' button. A red arrow points from the right side of the table towards the 'Start' button. At the bottom left is a 'Download All' button, and at the bottom right is a 'Home' button.

Meeting Information	Date/Time	Length (min)
Notary Document	Not Started	60



The screenshot shows an email invitation from Joshua Curry. It includes the recipient's name, the meeting topic, time, and a Zoom link. It also mentions that documents will be reviewed during the meeting.

Hello Jane Signer,

Joshua Curry is inviting you to a scheduled Zoom meeting.

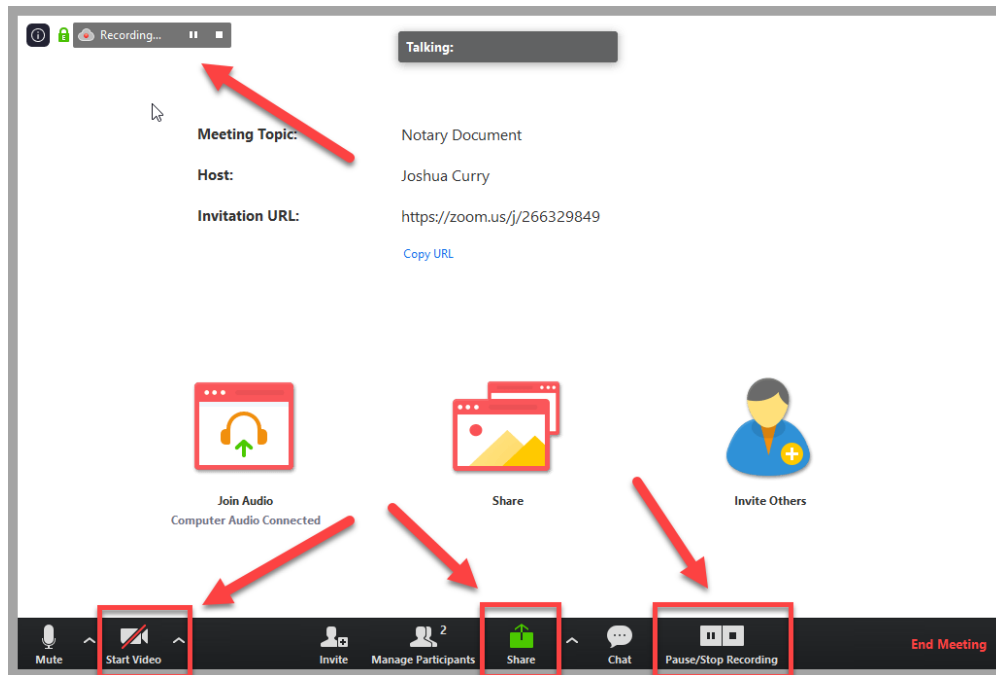
Topic: Notary Document
Time: 02/19/2020 04:30 PM
Join Zoom Meeting
<https://zoom.us/j/266329849>

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

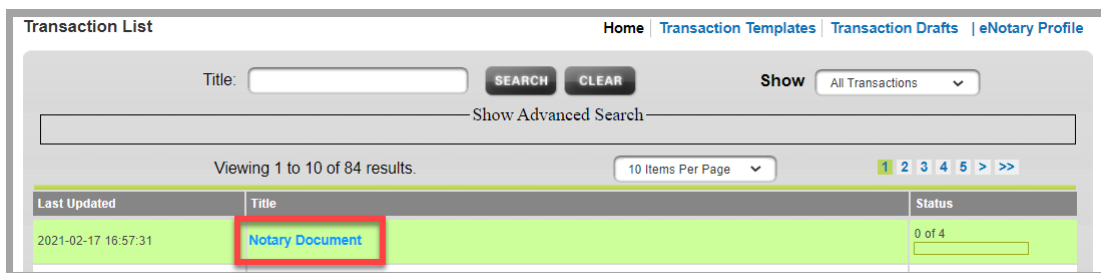
Demo Notary

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.

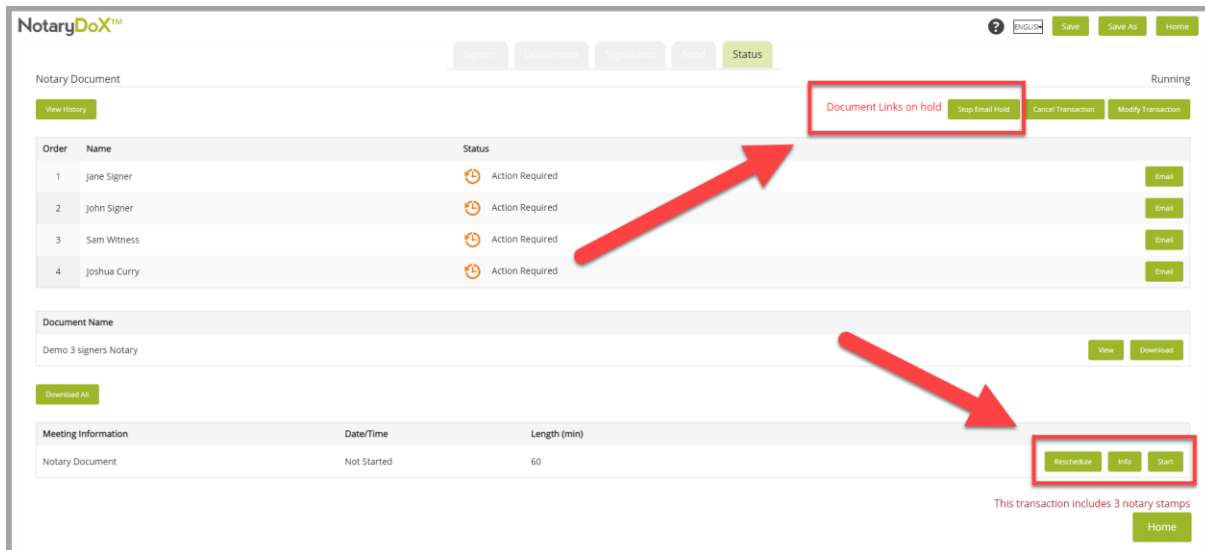


3. A typical conversation should include the following:
 - a. You should provide your name, location, date, and purpose of video call.
Example: *Good morning, my name is John Smith and I am a commissioned notary for the commonwealth of Virginia. Today is May 29th and I am in my office in Richmond. I will take the acknowledgment of your signature on a (power of attorney) document, is that correct?*
 - b. Let your signer know that the video call is recorded and that there will be a variety of steps to authenticate who they are.
Example: *I want to let you know that this call is recorded and that we will go through a few steps to verify your identity.*
 - c. You should have the signer provide their name and current residential address.
Example: *Could you please state your name and current residential address for the record?*
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.

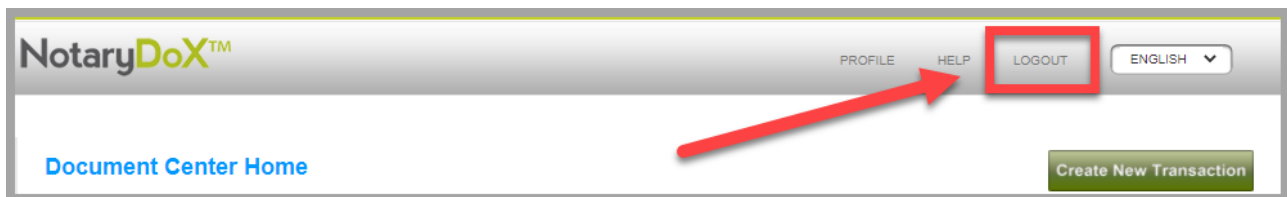


5. On this “Status” page of the transaction, click “Stop Email Hold” which will immediately send an email to your first signer with a unique URL for them to use to access the documents and sign. **[NOTE 5]**

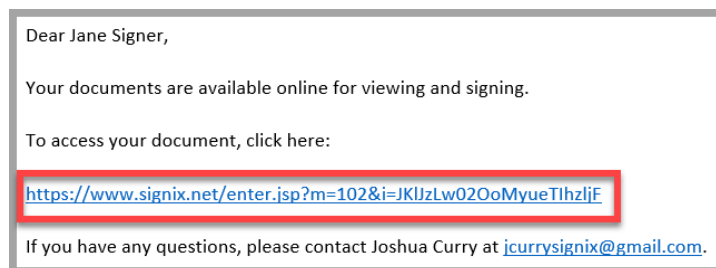
NOTE 5: If you need to reschedule or resend information for the Zoom meeting, you can also do that from this page. Do not share your own Zoom link with your signers, instead you will use the “Info” button here to be able to copy a shareable link to send to your signers yourself.



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.



- 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.



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.

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.

NotaryDoX™

Welcome!

In order to access, view and sign your documents, we first need to confirm your identity and also scan a picture of a government-issued ID, which can be a driver's license, passport or other ID card. Please retrieve that now (if you don't have it already), enter the expiration date of the ID below, and then click OK. If the date meets our requirements, you'll move on to the next step of the process.

Expiration Date (in the format dd/mm/yyyy)

Next

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 their SSN and DOB. Then they must complete the multiple-choice Knowledge-Based Authentication (KBA) questions before they share their screen.

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.

If they cannot pass the KBA questions with correct answers within a few minutes and after 2 attempts, they will be locked out from attempting further for 24 hours. You will be able to reuse this transaction, however you will need to use an alternative meeting platform as SIGNiX only provides 1 Zoom meeting for each transaction.

SIGNiX

You've been asked to review and sign documents online. It's easy!

To get started, you need to agree to receive electronic documents using the electronic signature service under the terms of the E-Sign Legal Consent by choosing **Accept** below. This will confirm that you are able to access all of the documents provided to you in electronic form and you agree to be bound by the terms and conditions of use.

To confirm your identity please enter the information below. Click **Next** to continue!

Read Legal Consent

Agree to Legal Consent? ☒ Accept ☐ Decline

Social Security Number (9 digits, no dashes)

Date of Birth (mm/dd/yyyy)

Next

SIGNiX

Jane, Please Answer the Questions Below

The following question(s) are designed to establish your identity and are generated based on over 30 years of public database information. Please carefully consider your choices and click Next when you've made a choice. If you successfully answer the questions, you will then be able to create a signature and complete the document(s) sent to you.

Which of the following corporations have you ever been associated with?

- ☐ KBA, Inc. (correct answer for demo)
- ☐ Business, Inc.
- ☐ Virtual Compliance, Inc.
- ☐ Foo & Bar, Inc.
- ☐ None of the above

Which of the following addresses have you ever been associated with?

- ☐ 10 Union Street (correct answer for demo)

Maura City, Notary

Client

(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 a link which *must* be opened on a mobile device. Or if they would prefer, they can choose to have this link emailed to them, but it still must 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.

Secondary Authentication Required

Due to the nature of these documents, we need to perform a second verification step, but this must be completed on a mobile device, such as a mobile phone or tablet. We'll provide you with a link, either via text or email.

To receive a text message, enter your mobile phone number below and click the **Text Me** button. To receive this link via email (in case you don't have access to text messaging services) please click the **Email Me** button.

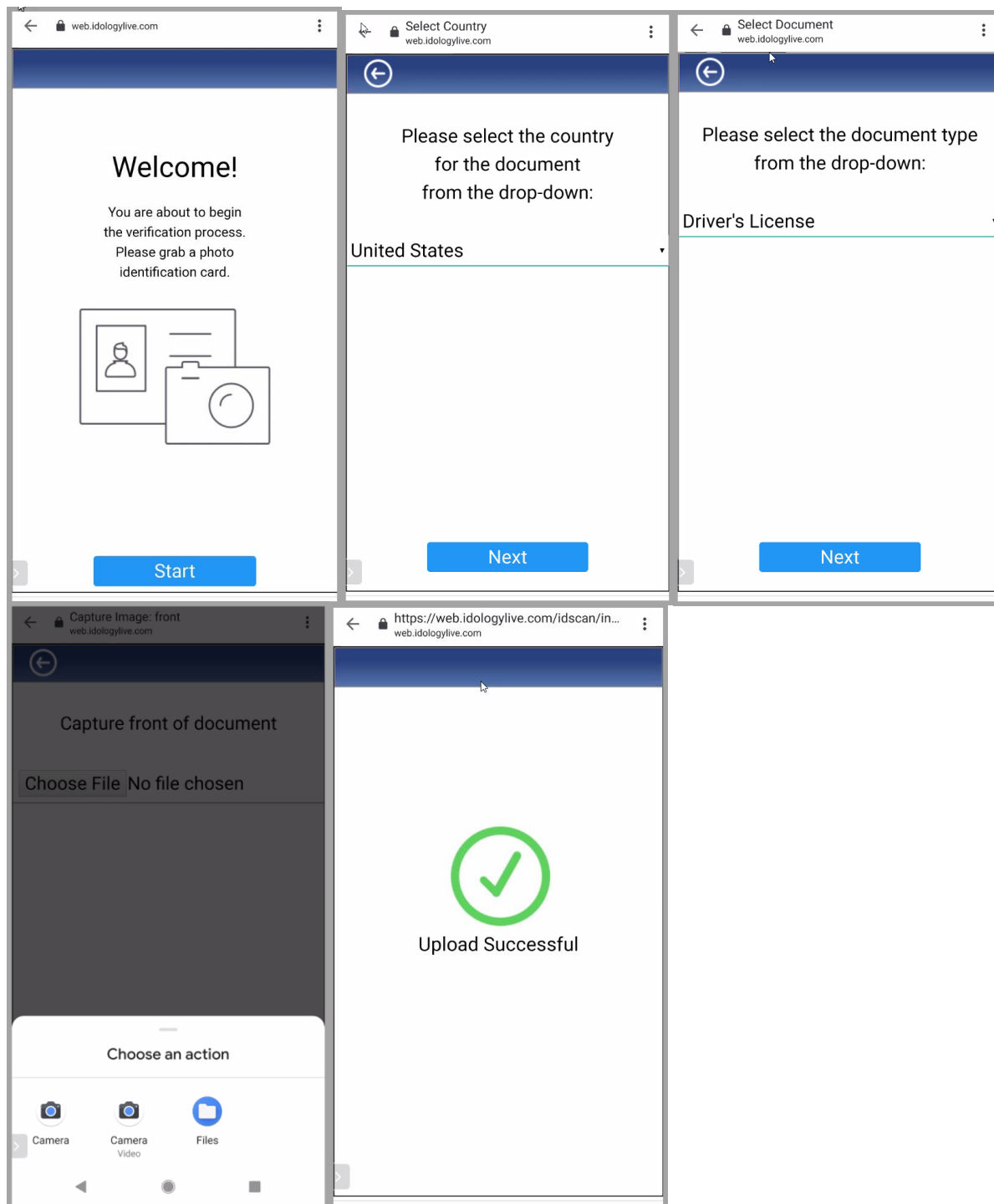
If you do not have a mobile device, please click the **No Mobile Device** button below. The person or organization which sent you these documents will be notified, and you'll need to complete these documents in another way.

Mobile Number

No Mobile Device E-Mail Me Text Me

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.

eNotary Walkthrough



If your signer is using a **Passport ID** card rather than a **Passport booklet**, have them select **"ID Card"** as the document type, instead of **"Passport"**.

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, following the requirements listed on the screen. 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.








Jane, Let's Create Your Signature

First, choose a password. This password will protect your electronic signature and let you access your signed documents after you've finished. Then, choose the style of your signature and initials from the options below.

Please create a secret, easy-to-remember password 6-20 characters long. The password must satisfy the following:

- Letters - Required (at least 1 and can be uppercase and/or lowercase unless stated as Required below)
- Numbers - Required (at least 1)
- Special Characters - Required (at least 1) : '!@#\$%^&*()_+~{}|[]\';<>?,-.-)

Select your password

Confirm your password

- 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.

Typically, the signer should be sharing their screen for this process.

SigniX

Demo Notary

My Progress

Ready To Review and Sign?

Select **Go** to jump right to your first action and let us guide you through the document. If you'd rather go at your own pace, choose **Let Me Review**. Simply scroll or use the **NEXT** and **PREV** buttons at the bottom corners of the screen to jump to unfinished signatures and other tasks.

Let Me Review

Go!

SAMPLE DOCUMENT

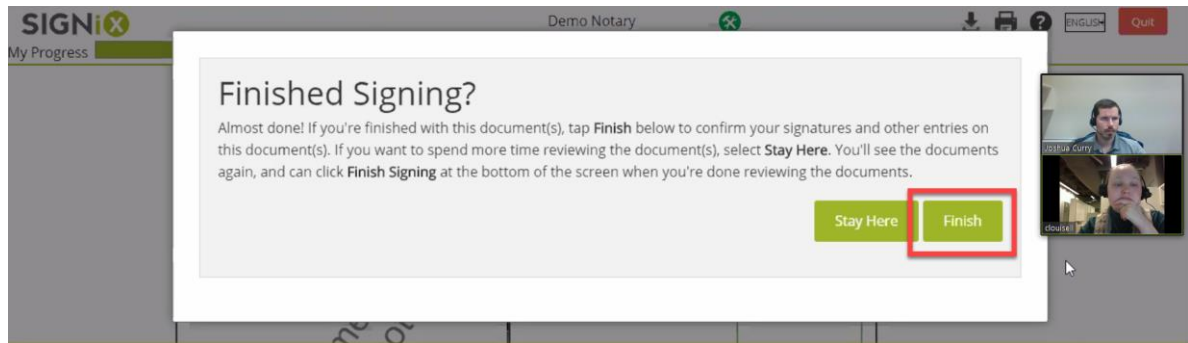
Video Feed:

- JEFFREY CURRY
- CHRISTOPHER

Top Bar:

- Download
- Print
- Help
- Language: ENGLISH
- Quit

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:
Example: *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.

eNotary Walkthrough

Notarial Act - Additional Information Required

Please provide additional information regarding this notarial act, as required by law. Enter the venue and fee assessed and then, for each party below, please enter an address and identification method used to identify the user during the signing process. For Example, "VA Driver License yyyxxxxzzz"

Venue: Home Office Fee Assessed (\$ US): 25

Notary Act Type: Acknowledgement

Signer: Sam Witness

Address: 987 Signix Ln Id Method: KBA w/ ID Verification

Misc: N/A

How is this Notarial Act being performed? Please select one of the following:

☐ In-Person (i.e. the signers are sitting in front of you now)

☒ Remote (i.e. we are using a compliant online-conferencing tool)

Let's Go

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.

Nothing in this Agreement shall be construed to preclude either party from developing, using, marketing, licensing and/or selling any product or service that is developed without use of the Confidential Information.

Initial: JS

Customer:

Name: Jane Signer Date: 02/19/2020 01:28 PM EST

Signature: Jane Signer

Notary:

Name: John Notary Date: 02/19/2020 01:28 PM EST

Signature: John Notary

John Notary
Electronic Notary
Public
Tennessee
Public REG#
123456789
Comm. Expires
01/01/2021
This notarial act
involved the use of
online audio/video
communication
technology

Joshua Curry

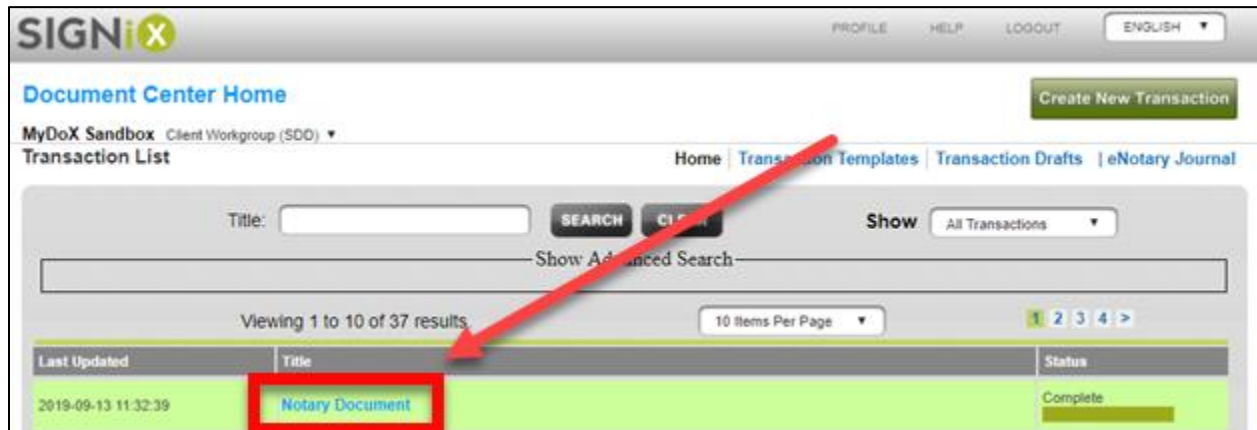
clouise

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.**

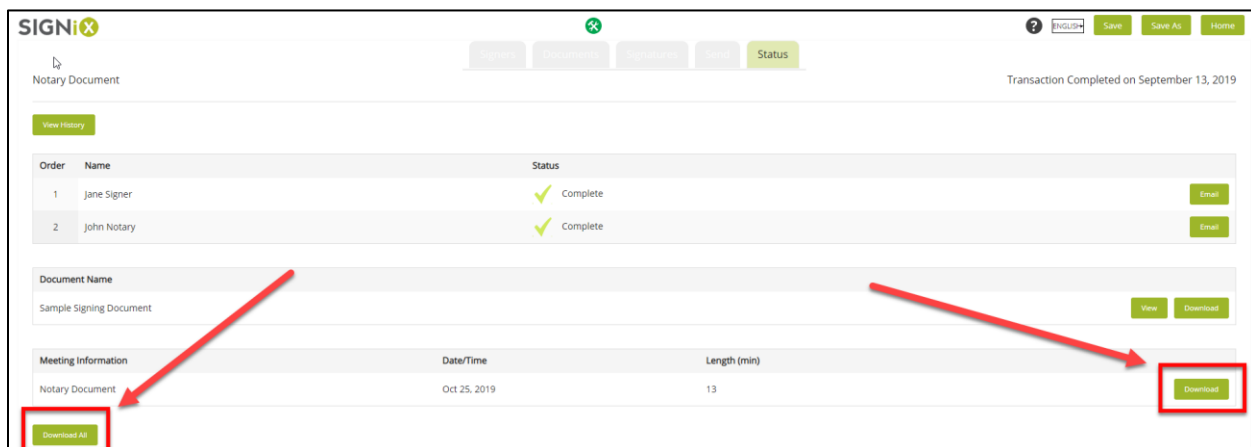
1. Log back into the notary's Document Center Home screen and select the now completed transaction.



2. Select “**Download All**” to download the signed PDF document and the Audit Trail as a zipped folder [NOTE 10]. Then download the video meeting under the “Meeting Information” section of the “Status” screen.

Note that it may take several minutes for the video to become available for download.

NOTE 10: “Download All” will NOT include the video recording. This must be downloaded separately.




eNotary Walkthrough

- To download a current copy of the eNotary Journal from the Document Center Home screen, select **"eNotary Profile"**. Here you will see all the recent notarizations you have completed, and you are able to download this report as a PDF. You can change the year in the upper right hand corner.

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

Last edit: 18 hours ago

Your commission expires 10 months from now!

Update Notary Info

Recent eNotary Journal Entries

Feb 18, 2021	Notary Document - Acknowledgement
Feb 18, 2021	Notary Document - Acknowledgement

View/Download

Recent Remote Online Recordings

Feb 18, 2021	Newest
Feb 11, 2021	Document Set: Santana - 11 Feb 2021

View/Download

eNotary Journal for Joshua Curry - 2021

For Year

Show entries

Search:

Last Updated	Transaction Name	Type	Venue	Document	Parties	Fee	Remote
02/18/2021 16:34	Notary Document	Acknowledgement	Home Office	Demo 3 signers Notary	(1) - Jane Signer - 1110 Market St - KBA w/ ID Verificati - N/a	25.00	Yes
02/18/2021 16:34	Notary Document	Acknowledgement	Home Office	Demo 3 signers Notary	(2) - John Signer - 123 Main St - Personal Knowledge - N/a	25.00	Yes
02/18/2021 16:34	Notary Document	Acknowledgement	Home Office	Demo 3 signers Notary	(3) - Sam Witness - 987 Signix Ln - Personal Knowledge - N/a	0.00	Yes
02/11/2021 15:01	Document Set: Santana - 11 Feb 2021	Affidavit	Home Office	Affidavit	(1) - Alexis Santana - 214 Navy Blvd - KBA w/ ID Verificati - N/a	0.00	Yes
02/11/2021 13:41	John Signer Notarization	Acknowledgement	Home Office	NOTARY Acknowledgment	(1) - John Signer - 1110 Market St - KBA w/ ID Verificati - N/a	0.00	Yes
02/03/2021 11:33	Webinar Demo	Acknowledgement	Home Office	NOTARY Acknowledgment	(1) - Sam West - 1110 Market St - KBA w/ ID Verificati - N/a	25.00	Yes
02/03/2021 11:33	Webinar Demo	Acknowledgement	Home Office	4 signers with stamps	(1) - Sam West - 1110 Market St - KBA w/ ID Verificati - N/a	25.00	Yes
01/29/2021 14:10	RON Demo	Acknowledgement	Home Office	NOTARY Acknowledgment	(1) - John Signer - 214 Navy Blvd - Personal Knowledge - N/a	15.00	Yes
01/26/2021 16:23	Demo RON	Acknowledgement	Home Office	NOTARY Acknowledgment	(1) - John Signer - 1110 Market St - Personal Knowledge - N/a	25.00	Yes
01/25/2021 13:27	Express Notary Demo	Acknowledgement	Home Office	NOTARY Acknowledgment	(1) - William Croce - 214 Navy Blvd - KBA w/ ID Verificati - N/a	0.00	Yes

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