Secured Signing

Remote Online Notary User Guide

This user guide will walk you through what is required to complete successful remote online notarizations with Secured Signing's Remote Online Notarization platform.

Table of Contents

MINIMUM SYSTEM REQUIREMENTS

WEBSITE AND WEB APPLICATIONS

Google Chrome is the recommended browser for Secured Signing. You could use Edge, Firefox, or Safari

HARDWARE REQUIREMENTS

The host/notary will need a **Windows** or **Mac PC** laptop/desktop with a **webcam** and **microphone**, enable cookies/

Signers, not notaries, can join the sessions with a **tablet,** or **cell phone android/iOS, cell phone must have cookies enabled:** For **Android** Phones: Open chrome > Tap 3 dots menu > Tap Settings > Site Settings > Tap Cookies > Tap allow cookies.
iPhone: Settings > Tap Safari > Tap switch next to Block all Cookies > Should change/keep to Off/ with no Green showing.

SOFTWARE REQUIREMENTS

A reliable internet connection with a **minimum of 5 Mbps download speed** and **3 Mbps upload speed**.

BEST PRACTICES

Make sure you don't have any unnecessary applications or programs open on your computer. Instruct your signer(s) to do so as well.

Find a **quiet**, **private,** and **professional** spot for the signing session.

We suggest the host/notary prepare and introduce their upcoming session in the follow way.

1. Call signer(s) to confirm online appointment, confirm use of device with camera/mic and procedures.
2. Send signer(s) email to test their computer to ensure their ability to transact: https://networktest.twilio.com/
3. Create a branded email invitation that includes video instructions on how to go through a KBA/IDv and Login Screen Sharing procedures. (Examples on page 28)

PROVIDING WITNESSES

We suggest you partner with other RON notaries to provide witness services for each other's sessions. This will reduce errors associated with a new user.

ACCEPTING ASSIGNMENTS FOR ACTS NOT ALLOWED IN YOUR JURISDICTION

Various jurisdictions allow for acts and identity verifications unique to only a limited number of states. We suggest partnering with notaries in those states so when you receive a request that is jurisdictionally not allowed in your state you can accept it. Then assign it to a notary partner in a jurisdiction that allows the document or procedure to be conducted. Some examples are: Wills, biometric identification for non-U.S. residents where there is no social security number, remote witnesses, proof of life documentation, etc.

THE SINGLE BEST PRACTICE EVENT IS QUALIFYING AND PREPARING YOUR SIGNERS FOR A RON SESSION. AND PRACTICE, PRACTICE, PRACTICE!!!

NOTARY CERTIFICATION COURSE
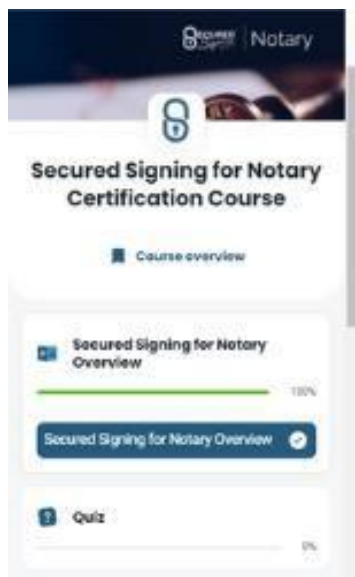
At no extra cost, you can now familiarize yourself with the system and receive a Secured Signing Notary certificate by successfully completing our Notary Certification course that shouldn't take more than an hour of your time.

HOW TO ACCESS THE COURSE
Login to your Secured Signing Paid account and go to My Account > My Settings > Notary > and click on the blue "Notary Certification Course" button. This will take you to our eLearning platform.

COMPLETE CAREFULLY CRAFTED LEARNING MODULES
Watch videos and complete quizzes for each learning module within the Secured Signing eLearning platform.
You will be tested on your Remote Online Notarization (RON) knowledge as well as your knowledge of our system.

PUT YOUR KNOWLEDGE TO THE TEST
Complete the Final Exam with a score of 85% or higher to pass the Notary Certification Course.

RECEIVE YOUR NOTARY CERTIFICATE
Standout amongst other notaries with your personal RON certificate that you can publish on your website or provide to customers to demonstrate your knowledge of Secured Signing's RON platform.

PROMOTE YOURSELF AS A SECURED SIGNING NOTARY
By completing the Secured Signing Notary Certification, you can use our Secured Signing Certified branding and demonstrate your proficiency as a Remote Online Notary.

PRACTICE AND SELF TEST PROCEDURES & DOCUMENT LINKS ARE ON PAGE 28

NOTARY ACCOUNT SETUP

ENABLE eNOTARY ON YOUR ACCOUNT ASSUMING YOU ALREADY HAVE eSIGNATURE

Using Notary requires a Secured Signing paid account.

To enable Notary, go to:

1. My Account

2. My Setting

3. Notary

4. Upload your Notary Seal

5. Upload your Notary Graphical signature (To create; draw on white paper, capture picture, email to yourself & save)

Secured Signing Remote Online Notarization User Guide   5 OF 33
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not for use or distribution by anyone other than the intended recipient. **Last revised August 23, 2023.**

FOR ACCOUNTS WITH MULTIPLE USERS

Any users in the account can be notaries by uploading their Notary seal and signature. In order to use Notary function, you need to buy Secured Signing Credits, the best option is to use auto top up, so you always have credits to schedule and perform RON transaction.
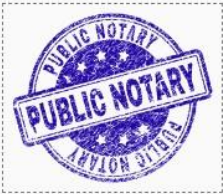
NOTARIES BASED IN THE UNITED STATES

The notary must enter their Commission ID, and commission expiration date. If your jurisdiction requires you to purchase your own x509 digital signature certificate you can do so by going to: https://www.identrust.com/certificates/enotary-programs > Buy Now > Select Secured Signing > Next > IGC Notaries Basic Assurance, individual Identity, software storage > Next > Select number of years > Next > Buy Now > follow promotes to complete.

If the Notary tries to notarize a document after the commission expiry date the system will stop them from doing so, as the Notary must upload a new Notary seal and update the commission expiration date. The same applies to an individually issued x509 digital signature certificate expiration date.

The Notary is fully responsible for maintaining these and keeping them up to date.

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SET UP VIDEO SIGNING – REMOTE ONLINE NOTARIZATION (RON)

1. Enable Video signing – RON function within the Notary solution.

2. Video recording will store in your preferred encrypted cloud storage location, US, UK, or Australia. The recording of the video will be removed 7 days after the signing process has been completed unless the recoding archive is enabled. You can download the recording before removal.

3. Enable Recording Archive storage – if you want to keep the recording in Secured Signings cloud storage, you can access the recording from Secured Signing. This function has an additional monthly cost, see pricing for more information.

4. Enable Recording Link in Signed Document - access to the recording of the video meeting via a link in the signed/stamped documents, is disabled by default. **NOTE**: Anyone who is in possession of the document may view the recording.

Once enabled a page is added to the document with the Video ID, URL link and password to access recording, it must be enabled with the Recording Archive storage if you want to access the recording from the signed document any later than 7 days after completion of the signing process.

EXTRA SETTINGS

1. **Stamped document sent to invitee by Notary or by Secured Signing.** The Notary can set up if the system will automatically send the signed document to clients on completion or if the document needs to be sent manually by the notary. If the 'Notary Public' option is chosen, the notary has full control of when the client will receive the signed notarized/stamped document and can be held until payment by the client is completed. **Typical setting is "Notary Public".**

2. **Invitee Authentication Type** – many US states require a RON meeting to include Identity proofing – Knowledge- based Authentication (KBA) and Credential Analysis – ID Verification before starting/joining a RON meeting. Tick KBA and ID Verification to include these as your default process. SMS adds extra security to access the signing process with an SMS code that is sent to the client's mobile phone. You need to know and enter the client's phone number during the invitation process before sending the document. **Typical setting is No "SMS".**
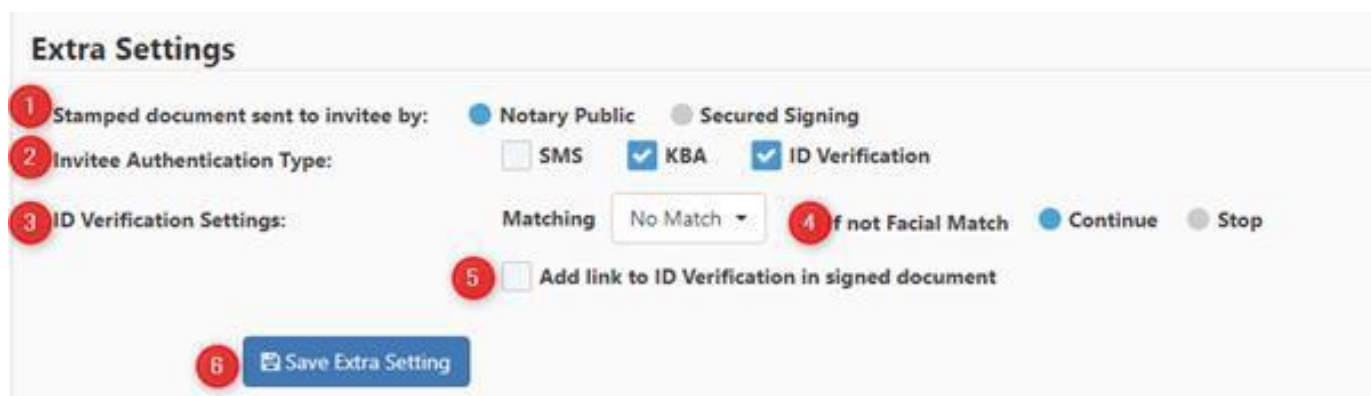
3. **ID Verification Setting** – you can set up matching data that you already know about the invitee, and therefore should appear on their ID such as names, DOB, ID Number, ID Expiry date. If this doesn't match, you can set the process to stop or continue. By Default, if data doesn't match the signing process continues. In any case, if something doesn't match an email notification will be sent to the sender/notary. **Typical setting is "No Match".**

4. **If No Facial Match**, IDv includes a biometric Facial Match, if the Face Matching with the ID picture is below the minimum score the face matching result will be failed. You can set the process to continue or stop the signing process. In either case an email notification will send to the notary/sender stating the face match has failed. NOTE: ID verification includes Biometric Face Match. **Typical setting is "Continue".**

5. **Add a link to ID Verification results in signed document**. This link will allow anyone who has a copy of the document to access a page with the official name of the signer/invitee as it was on the ID, type of ID used, date of the check and results of the check (pass or fail). **Typical setting is left "Unchecked".**

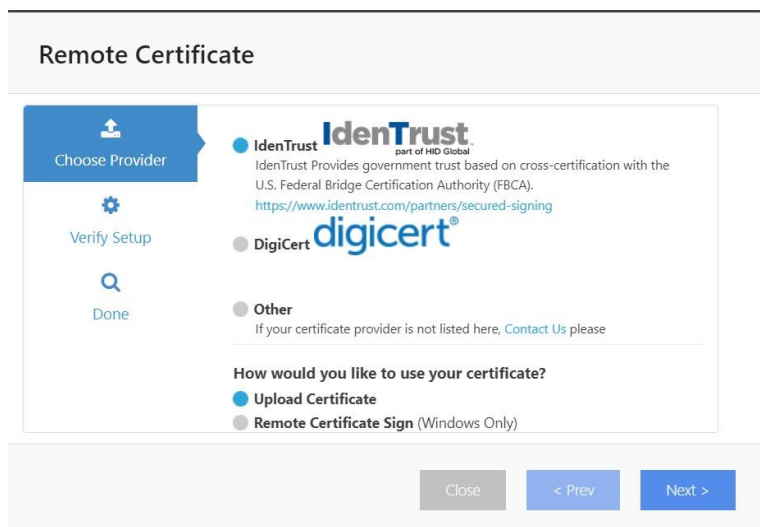6. **Save extra setting** to affirm your selections.

Please note invitee can do the KBA and ID Verification **any time before** the RON meeting, and then just click on the email invitation and it will take them to join the meeting if they previously passed KBA and ID Verification

TAMPER-PROOF NOTARY X509 FEDERAL BRIDGE DIGITAL CERTIFICATE – IDENTRUST

Secured Signing will allow you to use our x509 certificate if allowed. If your state requires you to use an individually issued Digital Certification from an approved provider, you can purchase one from IdenTrust here: https://www.identrust.com/certificates/enotary-programs > Buy Now > Select Secured Signing > Next > IGC Notaries Basic Assurance, individual Identity, software storage > Next > Select number of years > Next > Buy Now > follow promotes to complete.

Click Set up Certificate to do the setup for a remote certificate. **NOTE**: The name and email address on the certificate **MUST** match the name and email address you used to create your secured signing account. If not contact Secured Signing at helpdesk@securedsigning.com

1. Select the Certificate provider, typically IdenTrust > Upload Certificate > Next > Upload Certificate backup file (browse to the location that displays the IdenTrust icon of an open envelope with a certificate emerging out and a key in the lower left. The file should say sign.pfx and **NOT** encr.pfx > Enter Password > Verify > Save > Done >

2. The process is: – The backup file you created while installing the certificate in your desktop browser. You need to use your password in order to access the file and then press verify, (please ensure you're uploading the certificate for signing not for encryption), once verified press save and you're ready to use it in the signing process. Every time a Notary will notarize or sign a document, we will use this certificate to create an X509 Digital Signature tamper seal.

In very few cases you can upload it to Secured Signing or install the app in your Windows workstation to use the certificate on-premises. If that is your situation, please follow the below steps.

1. Upload Certificate Process – In case you have a USB token/hardware to store your certificate, or you want to keep the certificate on your premises/Desktop windows OS only, select remote Certificate Sign and press next.

2. Click verify to select the right certificate in your PC and enter the certificate password.

3. If successful, you will be able to click "save to continue".

4. Once saved you will need to download and install the Secured Signing Remote Certificate Sign App in your PC, click download to do it now. You can also do this later, or the first time you need to sign.

Useful videos:

How to purchase an IdenTrust Digital Certificate: https://player.vimeo.com/video/533361369

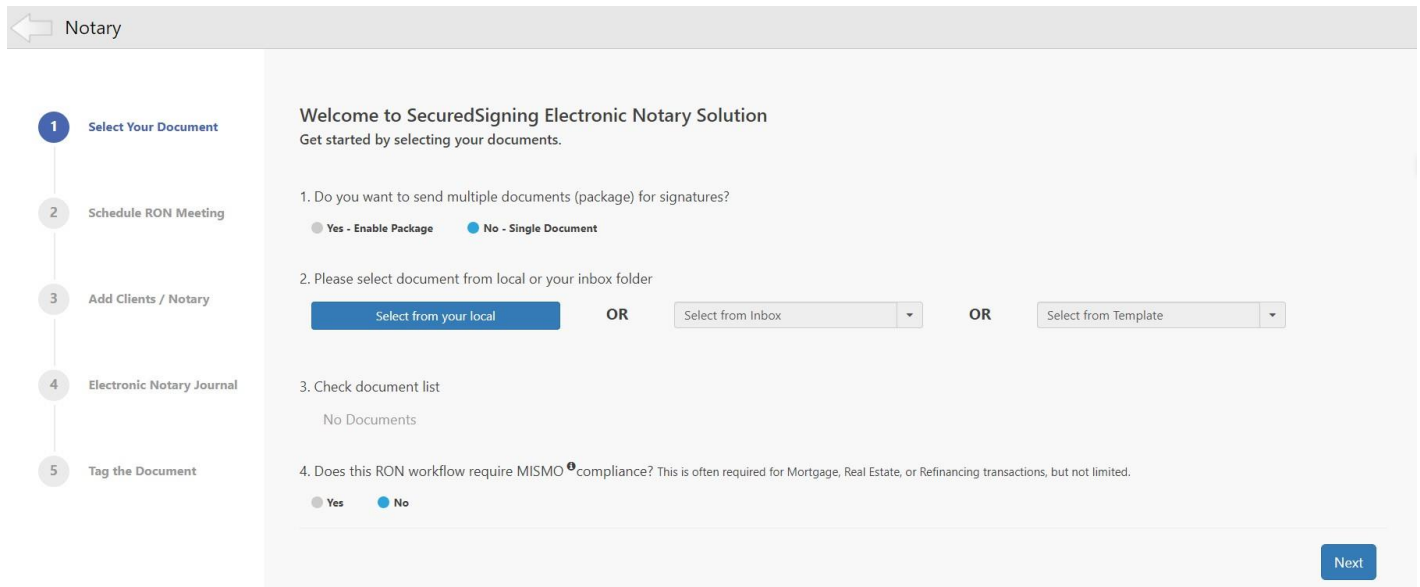How to setup your digital certificate with Secured Signing: https://player.vimeo.com/video/485737884

PREPARING FOR REMOTE ONLINE NOTARIZATION

Secured Signing offers an easy way for Notaries to set up the Remote Online Notarization process.

Click on the orange "Notary" button to start.
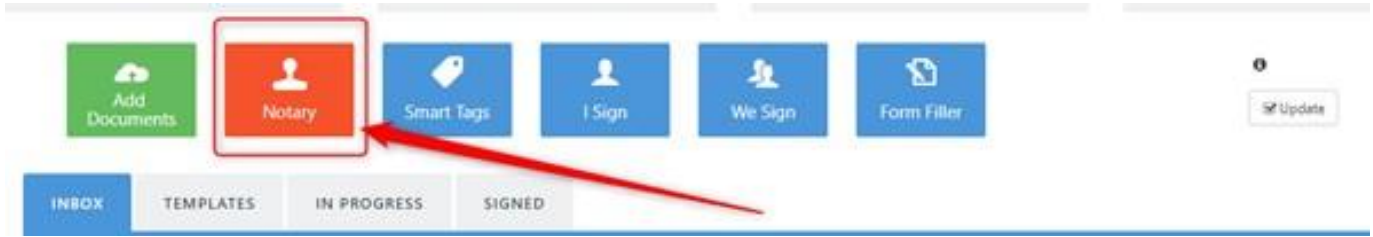
Then you will see this screen.

STEP 1: SELECT YOUR DOCUMENT

You can create a single Document (**NOTE:** document can be multiple pages not just one page) process or create a package of multiple individually uploaded documents. Documents can be uploaded as files in your PC/hard drive, or Cloud storage.

Select documents from your PC, local hard drive or Google Drive, Dropbox or OneDrive Account or if already uploaded, from the Secured Signing Inbox folder. If you are preparing a large document, we suggest creating it as a template. This will in effect create a copy package should you need it. (see page 28 for Template creation)
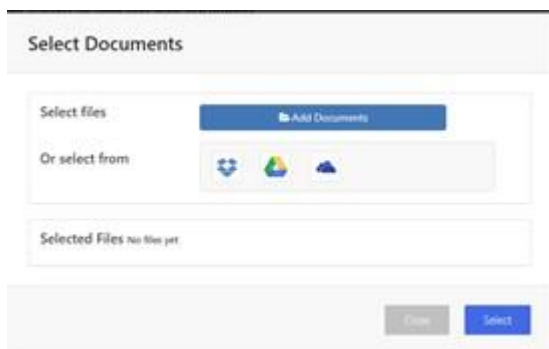
Once selected press next.

STEP 2: SCHEDULE RON MEETING

Enable RON and schedule an online notarization meeting, the date and time for the RON meeting should be before the signing due date. If you need to extend this due date and reschedule the RON meeting later, you can do so from the 'In Progress' tab. Select the default Notary, where you know which notary, if not yourself, will conduct the session.
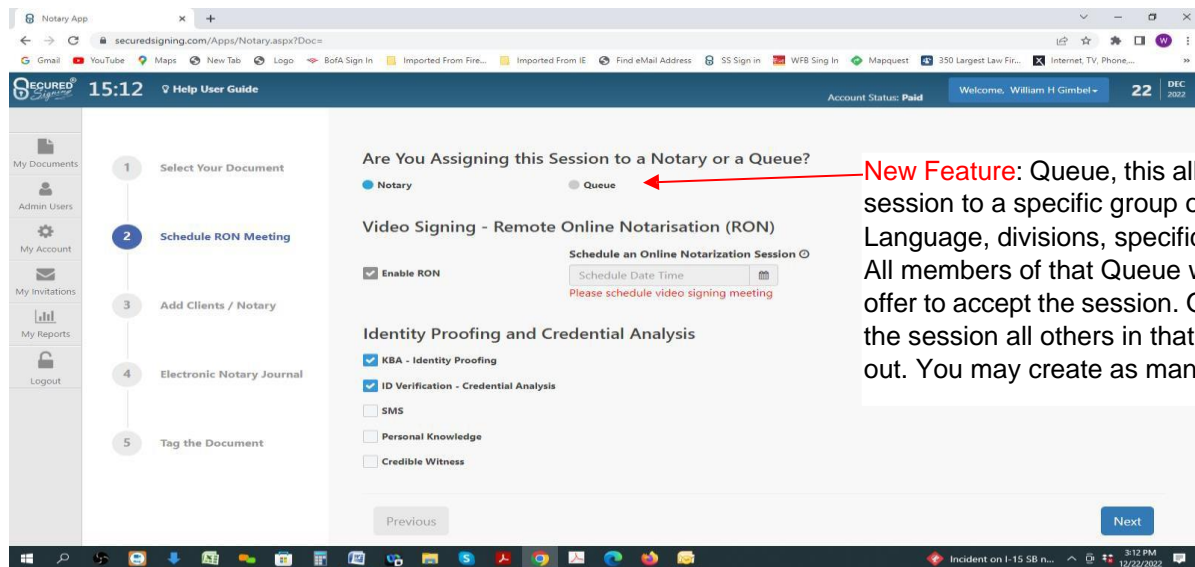
Identity Proofing and Credential Analysis

You can set up Identity Proofing and Credential Analysis as required. By default, we selected KBA and ID Verification, you may determine your own default methods, which you may change during the creation of a session.

Personal Knowledge means the Notary knows the client and can identify the client during the RON meeting.

Credible Witness – Signer is unable to provide ID Verification, or you know a witness that can identify the client. This witness needs to be added to the signing process and needs to pass KBA and ID verification if jurisdictionally required to do so.

Note: A signer can do the KBA and ID Verification **any time before the RON meeting**, and then use the email invitation to join the meeting if they have already passed KBA and ID Verification.

Vulnerable Audit applies to Florida Notaries

Secured Signing supports Vulnerable Adult Audit for Florida notaries.

These are special accommodations where Florida RON notaries, when notarizing certain documents, must follow specific procedures. See here for the Florida law that specifies what a RON Technology Provider must do:

http://www.leg.state.fl.us/statutes/index.cfm?App_mode=Display_Statute&Search_String=&URL=0100-0199/0117/Sections/0117.285.html

If the notary is from Florida and witnessing certain documents, you may have to use the Supervising the Witnessing of Electronic Records option. OR you may select NO and ask the signer the questions, which become a part of the recording and journal.

If YES is selected the Signer will have an additional set of questions and a statement after KBA is completed. Based on their answers the signer will move on to ID Verification before signing.

STEP 3: ADD CLIENTS & THE NOTARY & VENUE

Add Signer, Witness or Guest email address and name and setup ID Authentication Type, if needed.

Select which Notary, in the event you have multiple Notaries on your account, who will conduct the

session.

STEP 4: ELECTRONIC NOTARY JOURNAL

Secured Signing provides an Electronic Notary Journal that is generated at the end of the signing process.

Enter/Edit the Document Name, Type of Notarization, and enter the Notary Fee associated with that

act(s). The Electronic Notary Journal appears as below, access is through your dashboard under
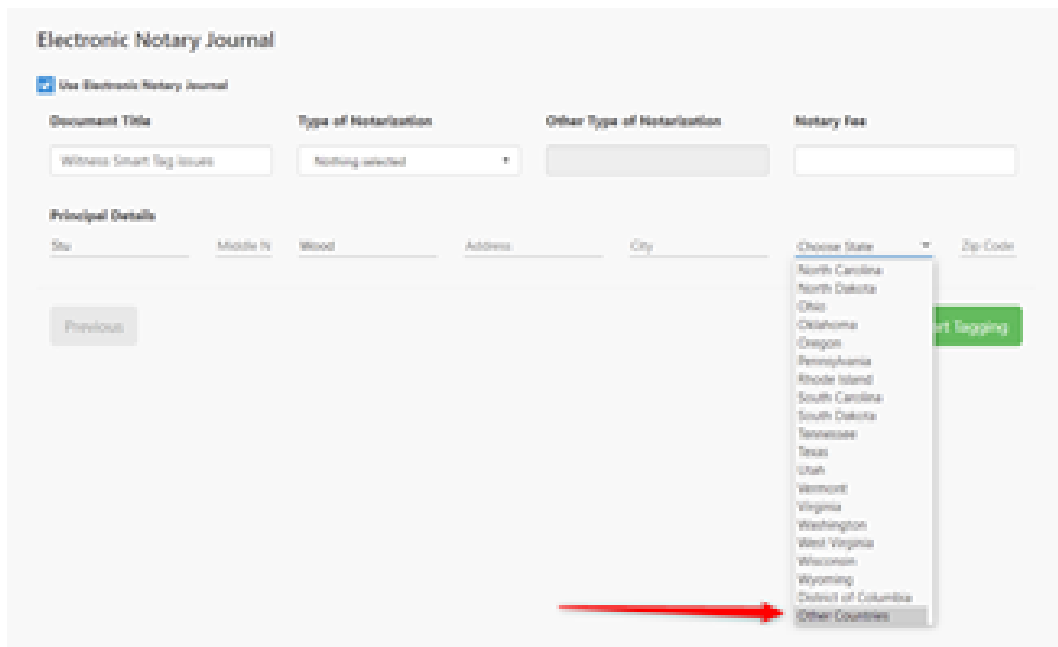
ACTIONS.

You can export the Electronic Journal to PDF or an Excel file for your own use or storage.

In the "My Report" page you can run an Electronic Notary Journal Report based on time period to cover notarizations done in a selected time period.
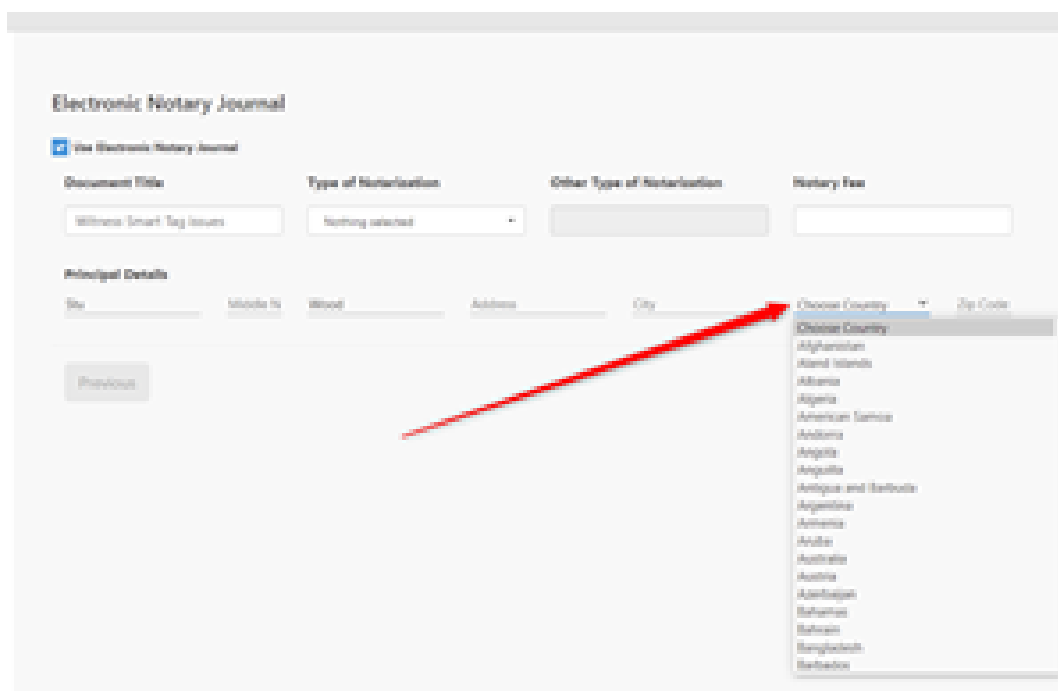
Notary Journal Where Signers Address is Not in The US – An Overseas Address

If the signer's address in not in the US scroll to the bottom of the "Chose State" dropdown list and click Country to select the **Other Countries..**

Then select the country from the dropdown menu.

STEP 5: TAGGING THE DOCUMENT

Before sending out the invitation for a RON meeting the document needs to be prepared, by adding signature fields notary fields/stamp and any needed text, date or other fields. **IN THAT ORDER**

Set up the Signature Properties: Full or Initial Signatures, name and time stamp will be included under the signature if selected as shown below.
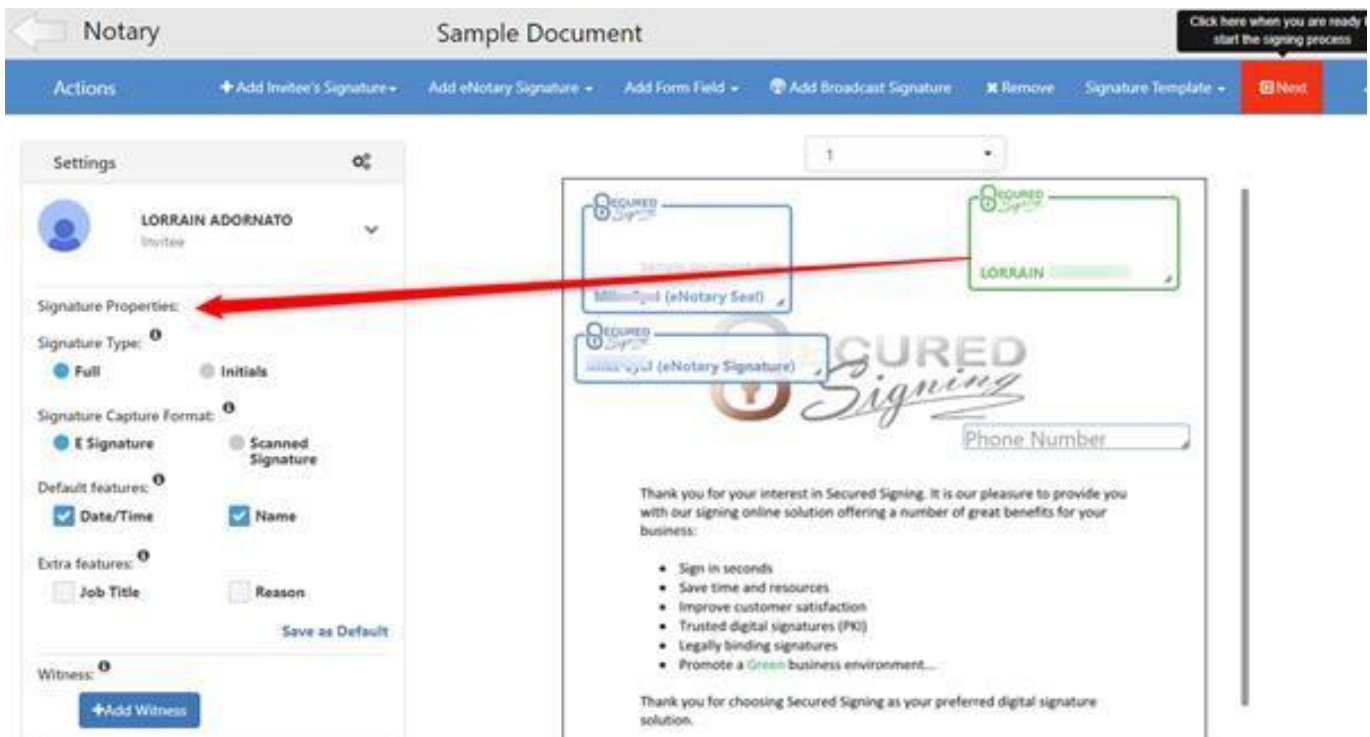
Add form Fields to be filled in online by the invitee/client/signer as shown below; Other fields are described below:
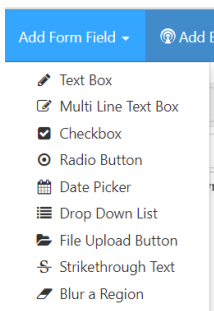
Checkbox: May be placed onto a document where an election must be checked.

Radio Button: Placed on a document what multiple or a single selection must be indicated.

File Upload Button: Placed and labelled at a location within the doc set as a reminder for the signer to upload a file to the package during the signing. Example, a lien release.

Blur a Region: Creates a box the covers/hides a portion of the page/text. You can also add a text box on top of a blur. Example the venue states Calif, you need it to read Ohio.
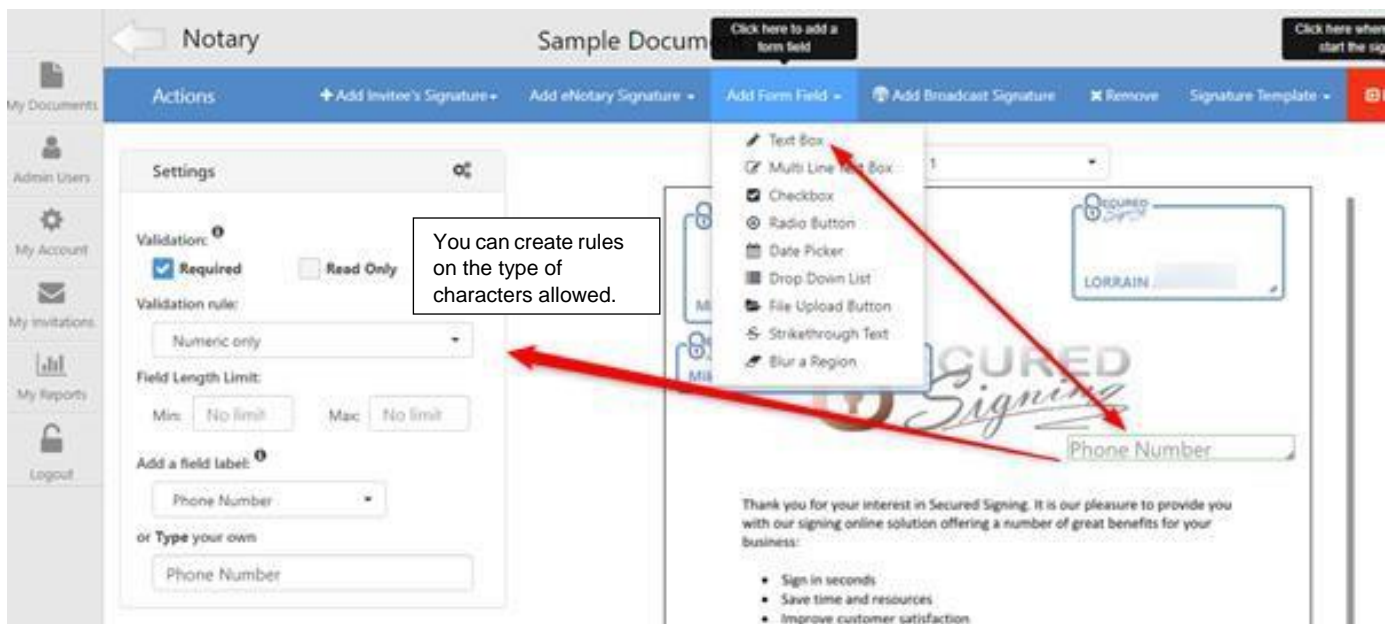
A text, date, checkbox or radio button may be configured such that: **Read Only** simply applies script to the document. If **Mandatory** is selected that mandate must be assigned to a member of the session. In the below example it is mandatory for Joe Signer to complete the box prior to signing that page. Joe's signature cannot be applied until Joe completes the mandatory box. Further you can label the box with a description of what must be entered by applying a Field Label (enter description) such as "Enter Drivers lic. #" where you now see Text Box 2
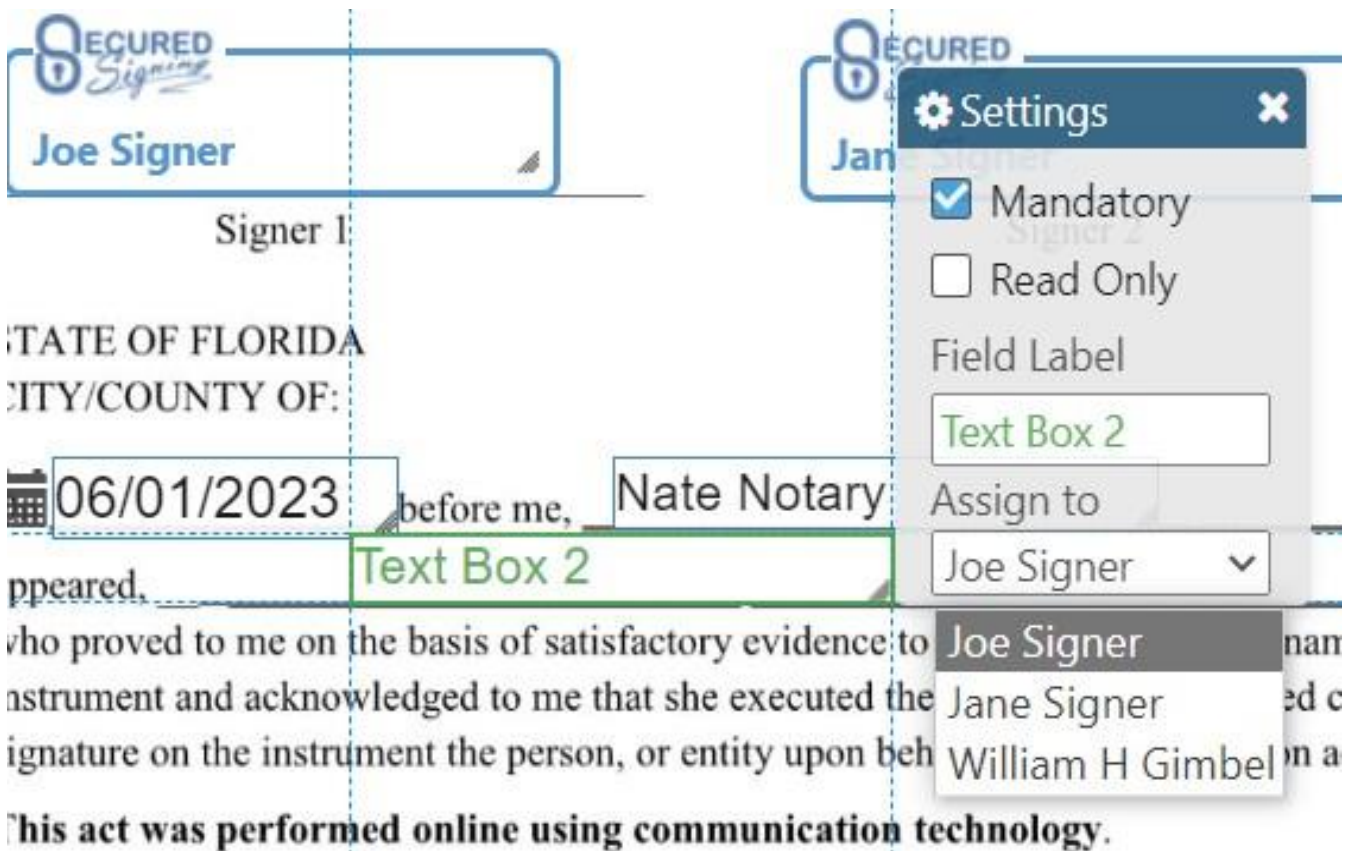
Once all preparations have been made select NEXT

CONFRIM INVITATION WORKFLOW

In the Confirm Invitation Workflow Popup you can:

1. Change the signing due date, the default is 7 days from sending the email invitation. We will send 2 auto-reminders if the document is not completed by the signing due date. Be sure the due date is after the RON meeting date.

2. Schedule Video Signing – RON meeting date and time.

3. Check signer details, you can update/correct them here.

4. Check the Identity Proofing and Credential Analysis are meeting your Notarization requirements; you can update the selection from there.

5. Edit Invitation Email, clicking on this brings up your session invite. You can edit that individual email or select another that you have created. Example: Spanish language invite.

Check if Notary Information is correct, the Notary is considered the host for the RON meeting.

Press 'Next' to bring up confirm of the Notary journal entry information.

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Once confirmed/corrected press 'Send'. This generates the eMail invitation sent to all session participants.

Useful videos:

How to prepare for a Remote Online Notarization session: https://player.vimeo.com/video/483341963

START/JOIN A RON SESSION AS THE NOTARY-HOST

There are 2 ways you can start or join a RON session as the Notary/Host:

1. Through "My Invitations" in Secured Signing

2. From the email invitation within your emails.

STARTING OR JOINING A RON SESSION THROUGH THE "MY INVITATIONS" TAB

Log in to your Secured Signing account and click on My Invitations. Find the document(s) you are going to sign during the RON signing meeting and click the "sign" button. It may say Fill & Sign, this indicates a form field must be completed in addition to signatures/initials.
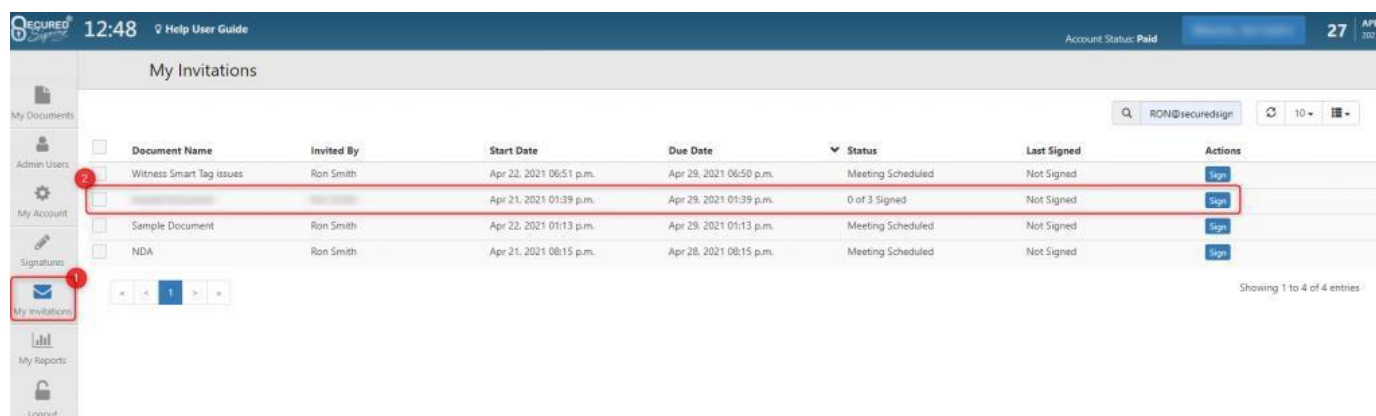
You will then proceed to set up your camera, speaker and microphone. Once that is done, proceed to the meeting room and wait for your clients.
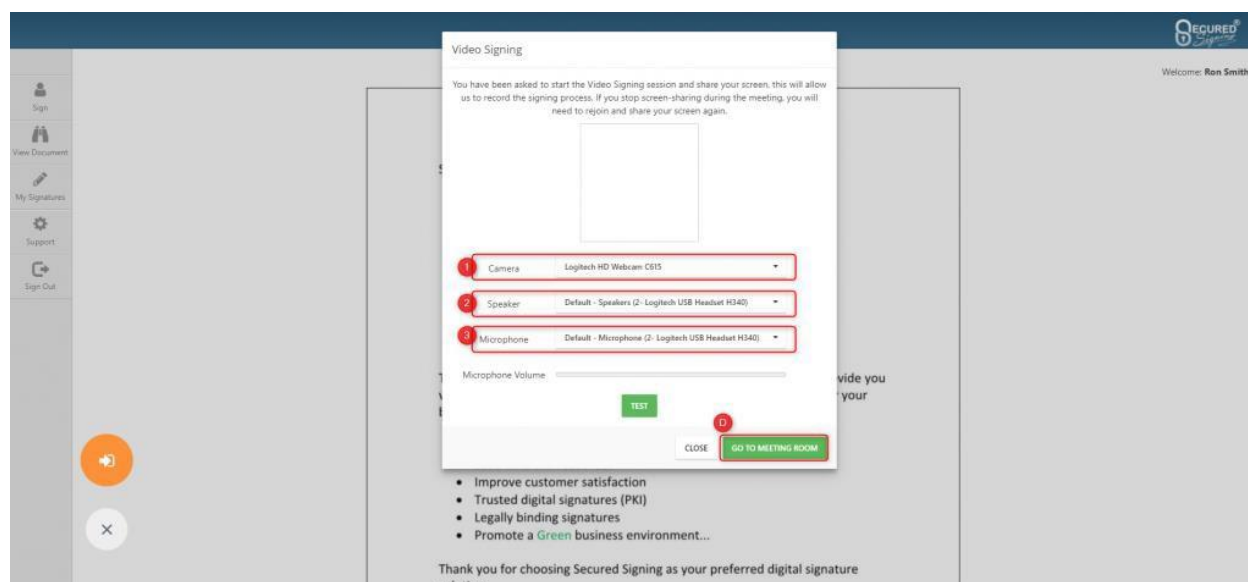
STARTING OR JOINING A RON SESSION THROUGH EMAIL INVITATION

You will receive an invitation from Secured Signing to host an Online Video Signing Meeting to digitally sign and notarize your client's documents.

Simply find this email within your email inbox associated with your Secured Signing account and click the "Click to Join" button. You will be prompted to enter your Secured Signing platform password.

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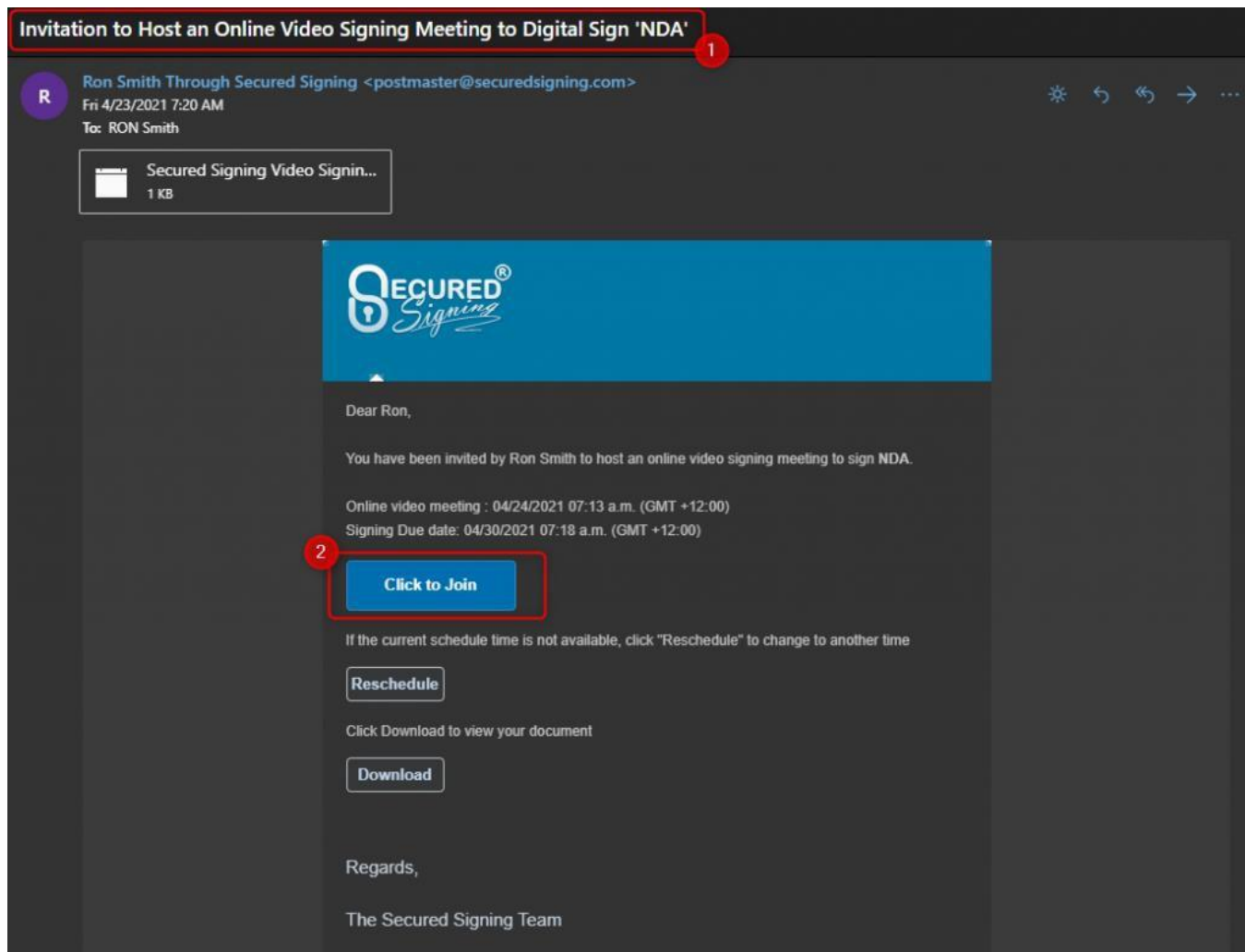
HOSTING A RON SESSION

RON Meetings starts with the Notary/Host, all participants must wait until the host starts the meeting. The Notary/Host starts the meeting by clicking on **GO TO MEETING ROOM**
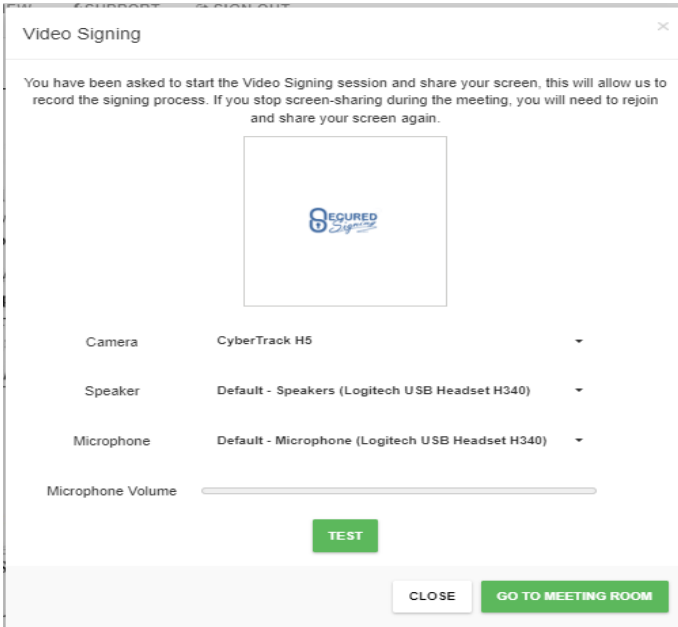
The next screen indicates who is in the meeting and if they have begun/passed their ID verifications. When the signer(s) are in the signing room indicated by the green Dot and YES select START MEETING
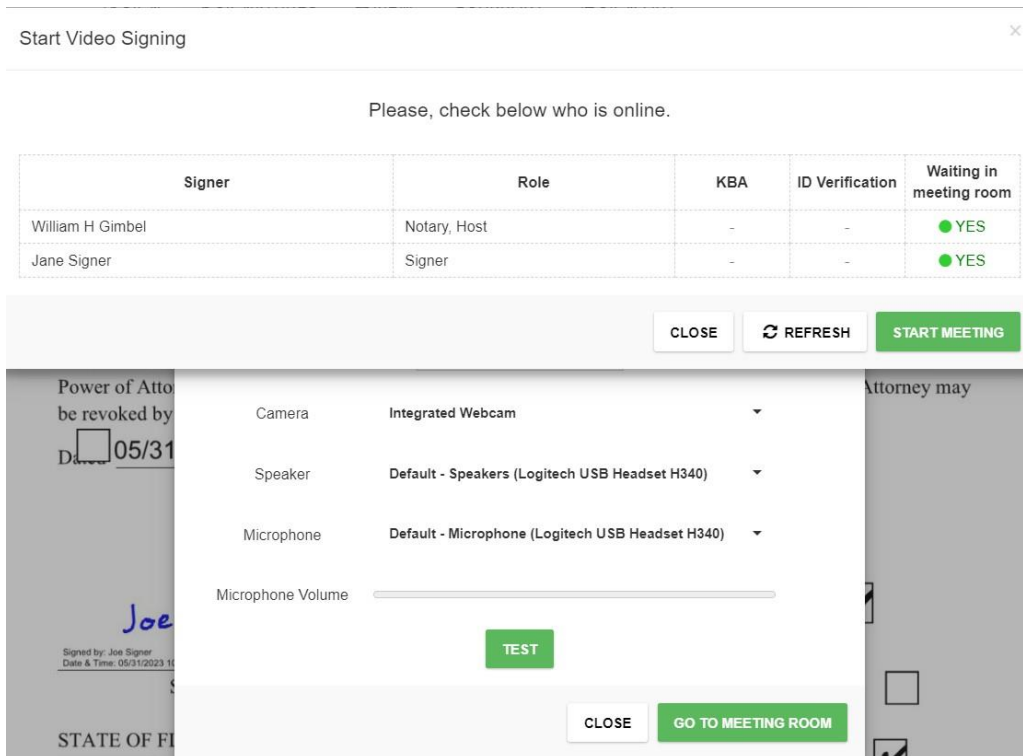
You must share your screen and select by selecting the screen/tab that displays the document and then click the Blue Share button. A video on the process is at: https://player.vimeo.com/video/525212479. Go to the **1 minute 30** sec spot.

THE MEETING BUTTONS CONTROL PANEL & OTHER OPTIONS

THE MEETING CONTROL PANEL
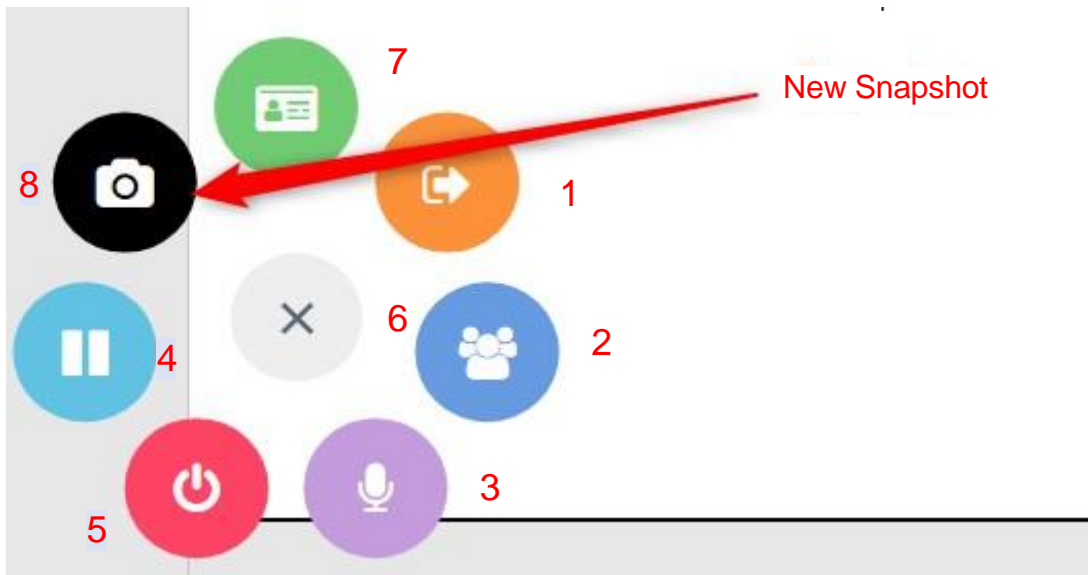
1. **Leave the meeting.** The Orange button allows participants to leave and re-join the meeting as long as the session remains active. If the Host leaves the meeting it will stop the meeting for all participants after 5 minutes.

2. **Manage Signing.** The Blue button manages the signers. The Manage signer button allows the host to manage the signing process who will sign and share their screen next. In the image below only the host and Stu Wood are online in this meeting and Stu is ready to sign. The host needs to click on the Enable Sign/Screen Share button.

3. **Mic mute/unmute.** The purple button toggles mute.

4. **Pause Recording / Start Recording.** The light-blue button allows you to pause the recording of the session and continue recording if paused. By default, recording will auto-start.

5. **End Video Signing Meeting.** The red button ends the meeting for all participants.

6. **Close Menu.**

7. **Id Visual Check.** The Green button initiates the ID visual check. Click this to select a participant to hold up their ID allowing you to verify their identity and compare with the ID verification done before the meeting. Their details will be displayed on the left and the live in session video will be displayed on the right. (**see example below**)

8. **Snapshot.** Allows for capture, edit and labeling of an exhibit held up to the signer's webcam, up to 10 captures/signer

SYNC ALL HERE

The Notary/host can scroll to any page on the document and click 'Sync All Here' (located on the left side of the document) to bring all the participants screens to same location on the document.

Sync All Here

END MEETING

The host can end the video signing meeting for attendees, if all invitees have signed, the end of meeting screen will show, and signed document will be sent automatically to all parties, if so, selected in your setup screen, by selecting the Red round icon on the control wheel

RESCHEDULE A MISSING SIGNER Notary can end the meeting for all those present/signed and reschedule a session for those that did not. Click Red end meeting icon, select Schedule A New Meeting. Select a date/time > RESCHEDULE a new email invite will be sent to those that missed the initial session IMPORTANT: If you have a session where one signer did not show and you have determined they will join later that day do not, as the notary, sign and stamp the document. You will do that after the remaining/last signer has signed later that same day.
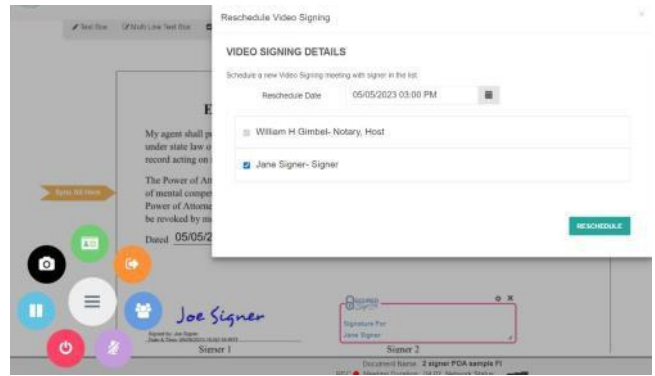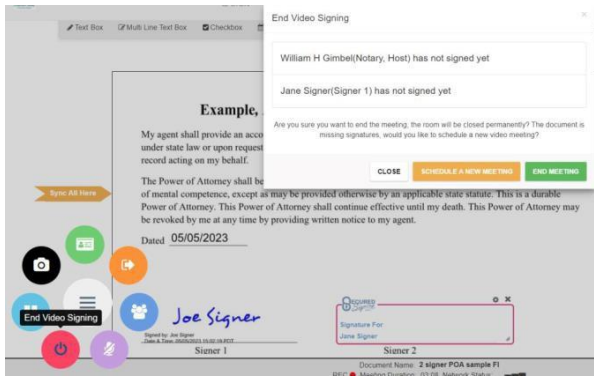
VIDEO AUDIO – BAD QUALITY

Once the RON Session is established and everybody is in the online meeting, you will notice at the bottom of the screen that the session is recording, the network quality (or network status) of the online meeting, and the meeting time duration. If the A/V quality is bad, showing one bar, reschedule the session to gain better reception.

To end the meeting select the red round icon at the 8:00 O'clock location on the control wheel.

MANUALLY RESEND INVITATIONS TO YOURSELF (HOST) OR TO CLIENTS

Log in to your Secured Signing account and go to:

1. My Documents

2. In Progress

3. Click on "i" under the **Actions** tab for the relevant document(s)

4. Scroll down to the client (or yourself) who you would like to manually send the email reminder /

invitation to. Click on the "Mail" (4) icon which will manually send out the email invitation to join the

video signing session.
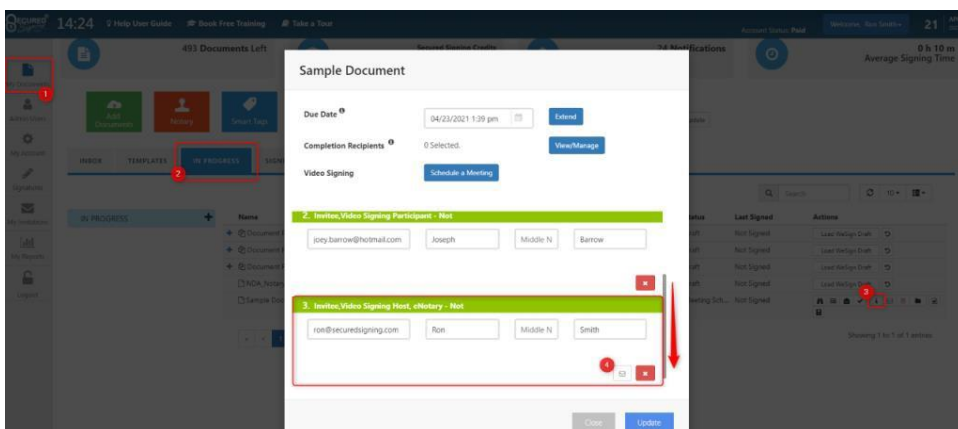
RESCHEDULE A NEW MEETING

The host can set up a new date and time for a new meeting with any invitees that didn't sign, this new meeting will require Video Signing credits to schedule.

Email invitations will be sent out to participants for the new date and time for the Video Signing Meeting, they can join the new meeting from this invitation.

NOTARY QUEUE

Background

SCENARIO: When an enterprise, with several notaries, needs to assign a job to a Notary but the requester/scheduler doesn't know who is able to accept the notarization.

Now with Notary Queue the job can be assign to a Queue and any available Notary that is a member of that queue can take the assignment and proceed with the job.

This feature is perfect for Signing Services or large companies with in-house Notaries in remote locations who are able to conduct RON transactions for the enterprise.

This feature supports the ability to have different roles / people for document prepared (tagging the doc) executing the transaction etc. Examples of queues; Document prepper, Spanish Speaking, After Hours, Agents qualitied to do Wills, agents in jurisdiction that allow for biometric ID validation (non-U.S. citizens), any specialty can be created as its own queue of notaries. Allowing the enterprise to operate as a signing service with unlimited queues.

The Queue is accessible / supports API's as well.

Add Queues - Setting

Admin User in a Team (up to 10 users/ Notaries) or Enterprise account (unlimited number of users/ Notaries) plan can setup unlimited Queues and can assign Notaries to a Queue based on attributes.

The workflow, as outline below is Login > My Account > My Settings > Notary Queue > Click Name Notary Queue > Enter Queue Name > Describe Queue attributes > Enter email of notaries currently entered in your enterprise account
> Save
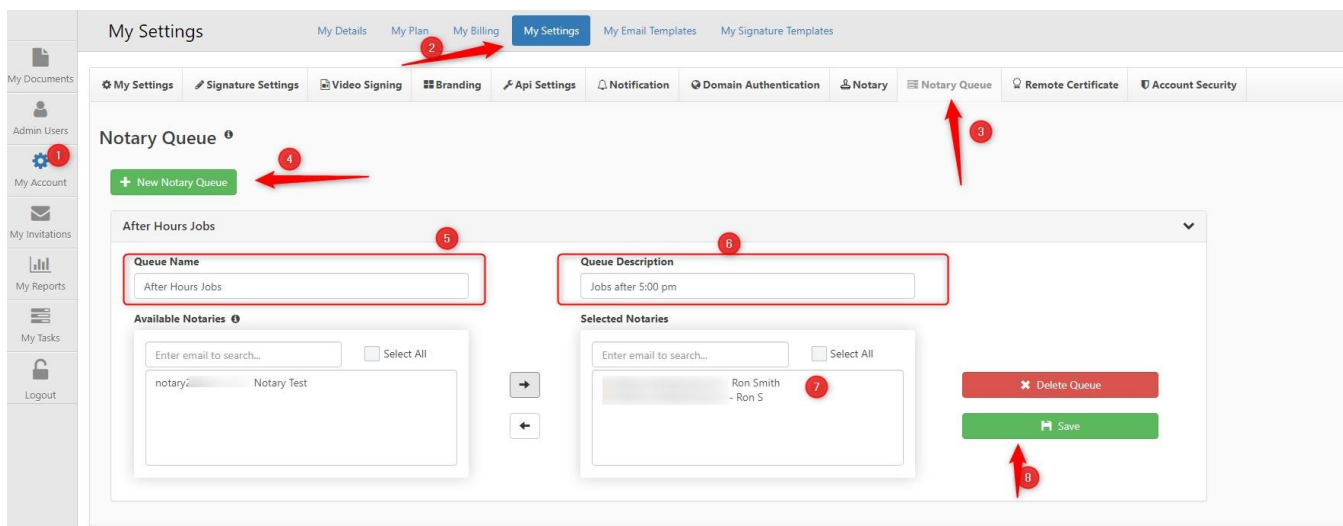
Assign To me (Notary) – Notary is taking the Job

Once a preparer submits/prepares a document for submission to the Notary Queue any Notary assigned to that queue can select the job. If the document is not pre-prepped the notary can perform that task as well. If the notary needs to reassign the job, they can return it to the queue which generates another alert to that queue's notaries. **NOTE**; Upon submission to the queue the signer(s) will receive an invitation, no waiting for assignment of a notary.
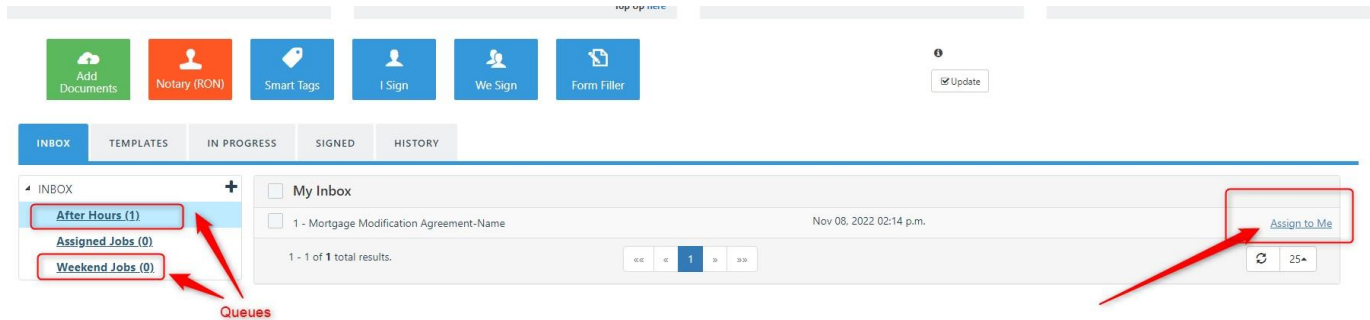

Job must be reassigned – Assign back to the Notary Queue

In case a Notary took a job, but he can't make it the Notary can assign it back to the Notary Queue and any available Notary in that queue can select it.

Notary Queue Management

The admin users in a Team or Enterprise account plan has full visibility and control of the Notary queues its status and reassignment between queues/notaries.
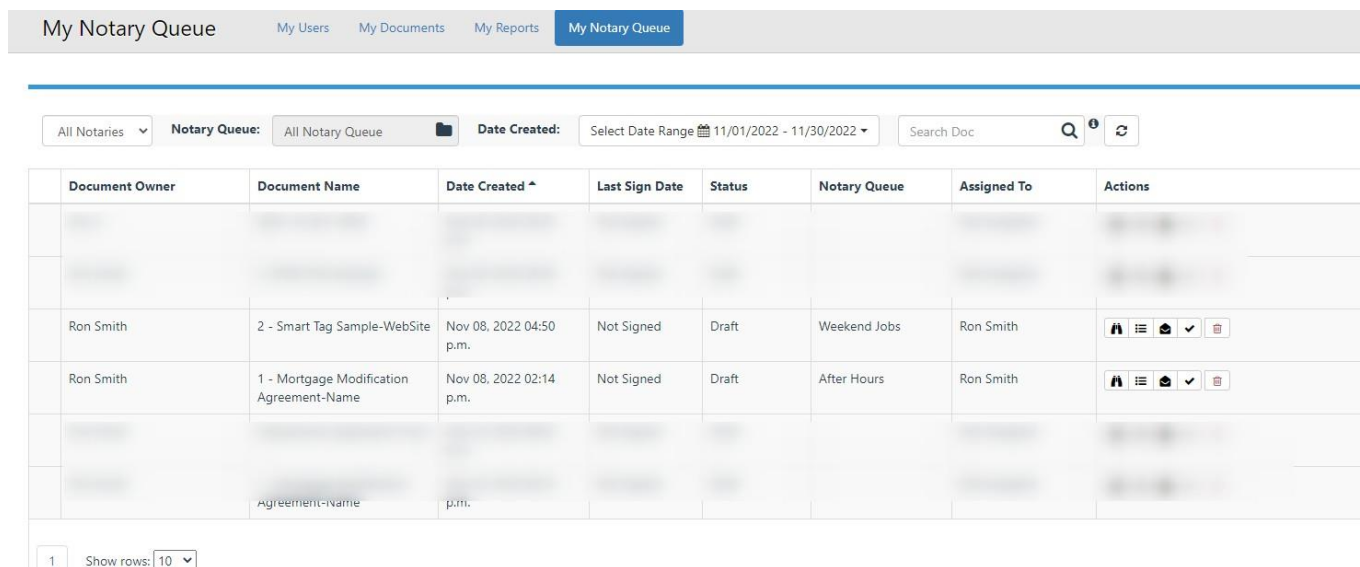
Please contact Secured Signing for any assistance in setting up a Notary Queue for your enterprise:

info@securedsigning.com

ADDITIONAL TOPICS
HOW TO PREPARE SIGNERS FOR RON

1. Prior to sending email invite call signers to confirm:

   a. Date/Time/Competency & device they will be conducting session on:

   If phone make sure they enable cookies: For Android Phones: Open chrome > Tap 3 dots menu > Tap Settings > Site Settings > Tap Cookies > Tap allow cookies iPhone: Settings > Tap Safari > Tap switch next to Block all Cookies > Should change to Off/Grayed position.

   b. If Computer send them this systems test link: <u>https://networktest.twilio.com/</u>

   All steps except the two Group Room tests should show pass. If others failed, send us the test results.

   c. Your email invitation should, if you have branded our site, come from your own domain Ie. @xyzcompany.com. The session invite email instructions must include what to expect for ID validation, Sign In and Screen share, see below example:

Greeting
3 IMPORTANT STEPS:

   1. To prepare for your signing you must view (unless instructed otherwise) this 2- minute instructional video that reviews the 2-step identity verification process at: https://player.vimeo.com/video/483853117

   2. Once you have viewed the ID video, quickly view the 1-minute Sign In and Screen Sharing instructional video at: https://player.vimeo.com/video/525212479

   3. Prior to Sign In close all tabs/browsers then click on the invitation link If you are required to verify your identity, please sign in 10 minutes prior to your schedule session time to complete that process. If you have any questions, please call 1.800.555.1212 and ask for RON. Regards,

   If your signers do not appear in the meeting room call them to determine why, you can reschedule if they are experiencing difficulties beyond your expertise. Reach out to Secured Signing: helpdesk@securedsigning.com with a detailed explanation of the situation.

CREATING A COPY PACKAGE USING TEMPLATES

Pathway: Login > Templates > + Create New Template > Upload (doc set) > Create Template > Prepare Docs, drag & drop all signatures, initials, text, date fields. NOTE: All fields will be labeled Invitee 1, Invitee 2 etc, Text box's if needing to be assigned will be labeled Invitee 1 or 2 etc.

The notary field will be labeled Notary Signature, Notary Stamp. When finished preparing select > Preview. This will allow you to Q.C. the document and add any missing elements. > Save as Template Insert Template name (Smith Docs) > Save

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30 OF 33
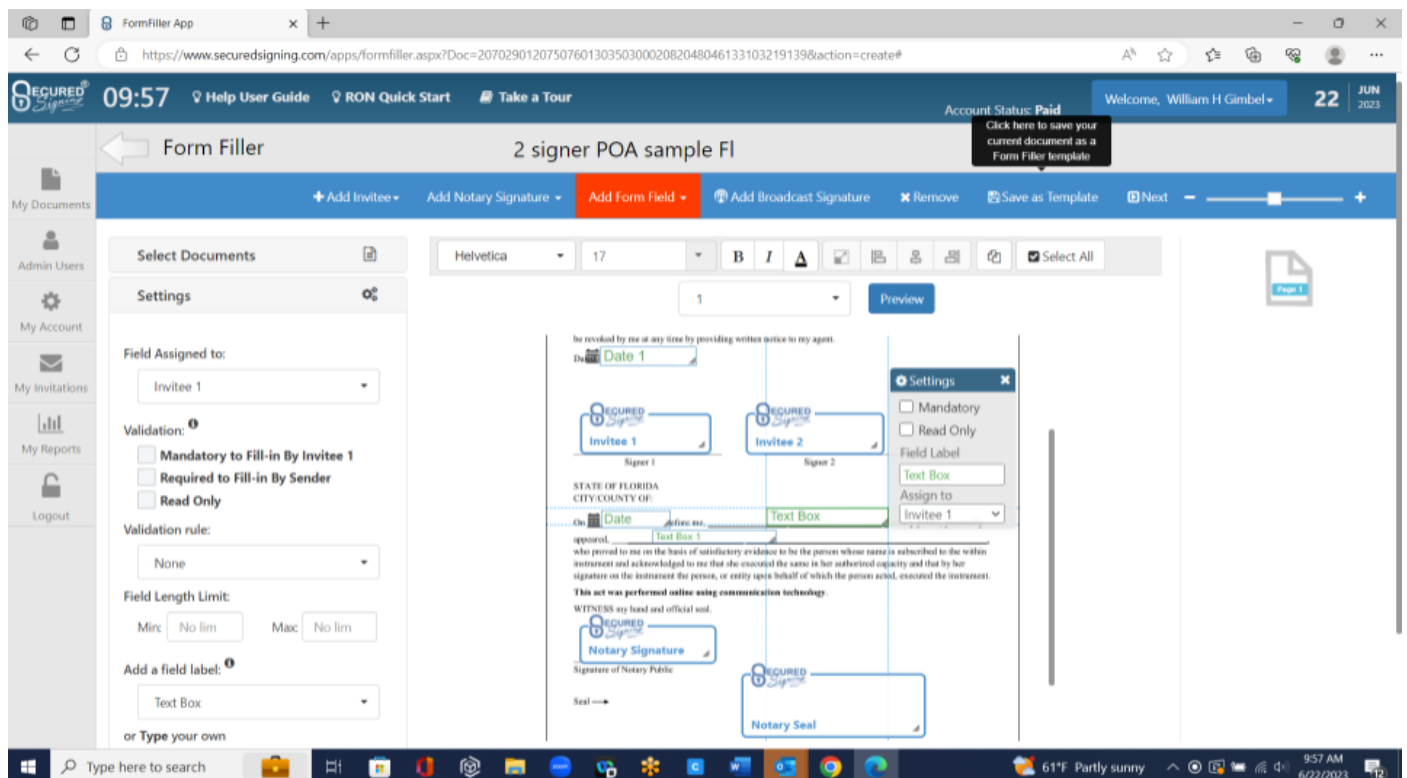
ADDING SIGNERS AND NOTARY TO AN EXISTING TEMPLATE/COPY PACKAGE

Pathway: Login > Notary RON > Select Document from Templates > Next > Select Date/Time > Select ID method > Next > Add Signer(s)/Witness/Guest information > Select Notary > Next > Enter Journal data > Start Tagging > You will notice all fields are completed > Next > Send

This process adds only minutes to session preparation, if the document/session needs to be recreated it is already available pretagged to upload.

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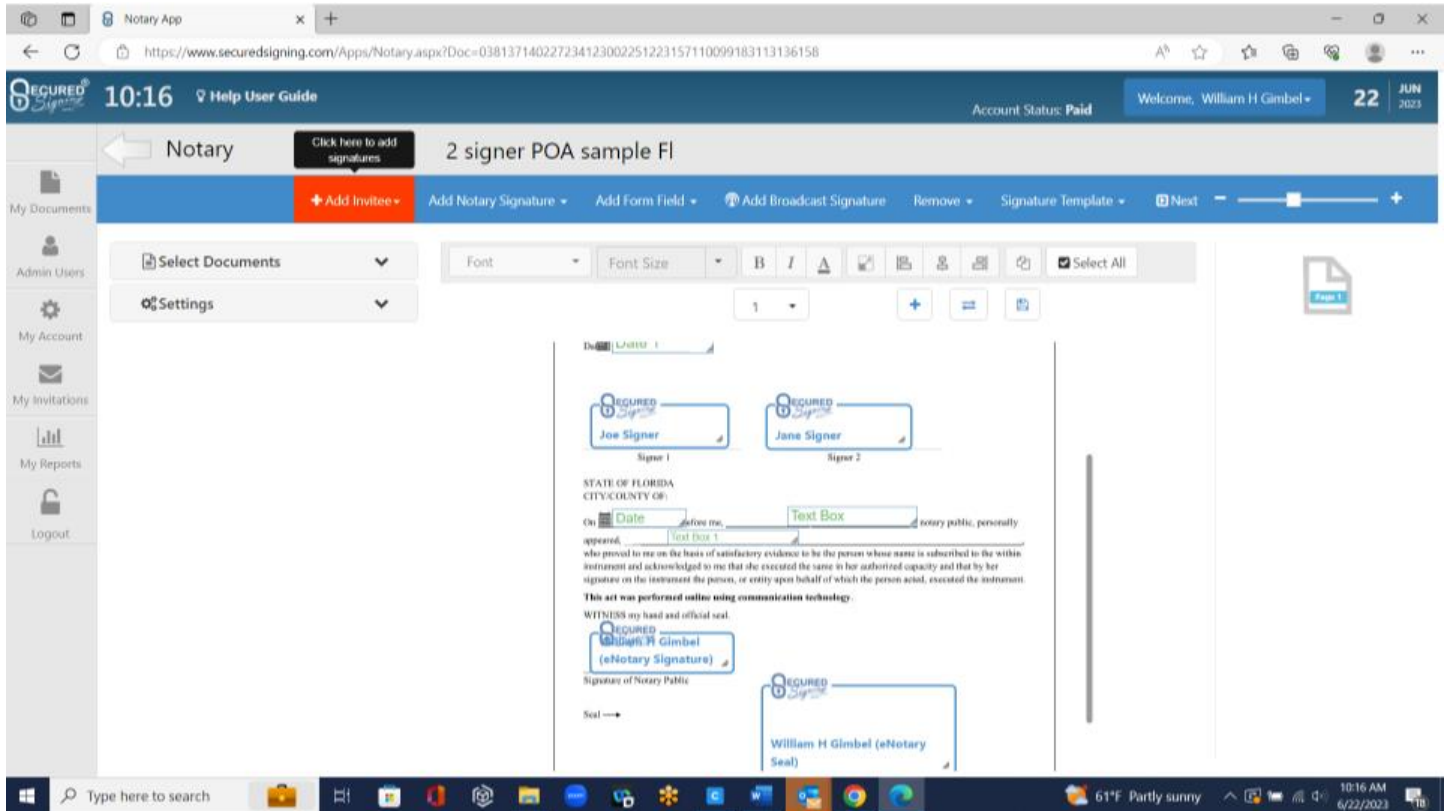
FREQUENTLY ASKED QUESTIONS

If you already have an IdenTrust digital certificate, can you use it with Secured Signing?

Of course! Simply upload your existing digital certificate to your secured signing account. **Note**: The email address and name associated with your IdenTrust certificate should match that of your name/email address in Secured Signing.

Go to "My Account > My Settings > Remote Certificate" and follow the prompts.

Do I need to buy a certificate?

The type of security certificate you will need to use depends on which state you operate in. Secured Signing can issue PKI X509 certificates free of charge if your state does not require you to purchase your own individually issued certificate. Check with your Sec. of State Notary Public Administrator to confirm.

If your state requires an individually issued Federal Bridge Certificate, Secured Signing has partnered with IdenTrust (https://www.identrust.com/partners/secured-signing) to provide you that Federal Bridge Certificate.

How do you send documents to the signer and / or more recipients after the signing process occurs?

You must set this up within your Secured Signing account.

First, you must give Secured Signing authorization to email signed documents on

your behalf. Go to My Account > My Settings > eNotary.

Scroll down to "Stamped document sent to invitee by:" and click Secured

Signing. Second, you must enable additional completion recipients.

Go to My Account > My Settings.

Scroll down and turn "Additional Completion Recipients" to ON.

Now, when you prepare the document and confirm invitation workflow, you can add additional recipients to receive the signed and notarized documents once the full signing process is complete.

How long does Secured Signing hold videos (and documents)?

Secured Signing holds videos (and documents) for 7 days after the notarization signing process. To keep your files long term, ensure that you enable Secured Signing storage in your settings or enable cloud storage within your own cloud storage system. Or you can use both! It's completely up to you, just make sure you choose the best option for you.

How do I access videos if we store them?

You will have a button within the "My Documents" section under "My History". Located on the right, a video button will appear next to any documents that contain a video file within them. Simply click on the video icon and download your video. It's that easy.

HELPFUL LINKS

Below is a list of helpful links that you can use for troubleshooting or understanding the Secured Signing RON platform. We will be adding to this list, so check back monthly to confirm you have the latest.

1. How Secured Signing Billing, Credits and Auto Top up works

2. How To Top Up Your Account with Secured Signing Credits

3. RON Workflow with Secured Signing

4. RON Notary Introduction Script

5. Practice, Self-Testing Procedures, Download Test Document Below

6. Template/Copy Package Creation

7. Uploading Multiple Docs to Create A Package

8. Adding a missed element in a live RON session

9. Allow signer session entry if IDv fails

10. How to add a Guest to a Notarial Session

11. How to add the notary as a witness to a signature

12. Selecting IDV with Biometric Face Match

13. Display Signer ID Verifications

14. Credible witness confirmation of viewing signatories

15. Join our weekly customer training with Tips & Tricks hosted by Bill Gimbel of Secured Signing.

[Download A Test Document to Upload to Secured Signing]

CONTACT US

Questions?

Contact our helpdesk on helpdesk@securedsigning.com