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1. BASIC IT REQUIREMENTS

- Device with camera and microphone
- Internet access
- Video conference provider - *must use an approved provider in RI*

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2. ENGAGE IDENTITY PROOFING SERVICE PROVIDER

- FOR NH & RI ONLY
- Must verify client's identity using multi-factor authentication
- In RI, must use one of the Dept. of State's approved providers

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3. SEND DOCUMENTS TO CLIENT

- May send by mail or electronically but make sure client can print document to sign with wet-ink signatures

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4. VIDEO CONFERENCE WITH CLIENT

- Must record the video conference and store the recording for time period prescribed by each state

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5. CONFIRM CLIENT'S LOCATION

- Client must be in state, unless notarization is conducted under NH or RI law

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6. VERIFY CLIENT'S IDENTITY

- Single-factor for CT, ME, MA, & VT Multi-factor for NH & RI (*see Step 2 above*)

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7. CLIENT SIGNS DOCUMENTS

- Signers should execute using wet-ink signatures

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8. CLIENT SENDS DOCUMENTS TO NOTARY

- Original, wet-ink signed documents should be mailed or otherwise delivered to notary for execution
- CT also requires the signed document to be sent electronically

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9. CONDUCT 2ND VIDEO CONFERENCE WITH CLIENT

- FOR MA ONLY
- For real estate documents, must video conference with client a second time during notarial act

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10. NOTARY NOTARIZES DOCUMENTS

- Notary should notarize documents in wet ink using any state-required wet-ink stamp or seal

CATIC makes no representation as to the sufficiency or appropriateness of the information contained herein for any particular situation or purpose. Please consult your lender partners, recording offices, and underwriters to determine whether a remote notarization process is acceptable to them.