**VATC PROTOCOL FOR REMOTE NOTARIZATION AND RECORDING: CHECKLIST**

\_\_\_\_ Contact signer(s) to discuss the logistics and feasibility of remote notarization

\_\_\_\_ Establish the method of audio/visual communication and confirm that signer can comply

\_\_\_\_ Establish date/time with signer to perform remote notarization

\_\_\_\_ Prior to the call, transmit all documents to be notarized to the signer by PDF (email), fax or snail mail and instruct signer to review them

\_\_\_\_ Contact signer at designated date/time

[Recommendation: If not done previously, to expedite the process and/or to reduce the length of video recording, prior to starting the recording, conduct a verbal “dry-run” with the signer by explaining how the process will play out]

\_\_\_\_\_\_ Begin recording and CONFIRM that recording is actually occurring:

\_\_\_\_\_ Establish clear audio/visual contact with the signer. Must see signer’s face.

\_\_\_\_\_ Establish Identification of signer:

\_\_\_\_\_\_ Personally known to the notary

\_\_\_\_\_\_ Displayed to the video these two forms of ID (both sides, if applicable):

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_; and
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_ Signer holds EACH page of EACH record to be acknowledged to the camera

\_\_\_\_\_ When instructed by the notary, signer signs the record(s)

\_\_\_\_\_ Notary instructs signer how to send the signed record to the notary

\_\_\_\_ Recording ends - recording is saved for 7 or more years

\_\_\_\_\_ After signing (same day), signer sends a version of the signed record back to the notary by:

\_\_\_\_ PDF or fax (strongly preferred); or

\_\_\_\_ Photograph or other means

[**Note: VATC does not allow the recording of a document sent back by photo]**

\_\_\_\_\_ Upon receipt of a recordable version of the record from the signer, Notary executes the Vermont Certificate and:

\_\_\_\_\_ If received by email PDF or fax, notary prints the record, attaches notarial certificate (to create an

original document) and records; or

\_\_\_\_\_\_ If notary receives a photograph of the record, notary requires the signer to promptly deliver

the signed record to the notary (snail mail or personal delivery to notary)

\_\_\_\_\_ Upon receipt of the signed record via snail mail, the notary attaches Vermont Certificate to create an original

record and records the package.