**Remote Notary and Witness Checklist**

**Before conducting the signing**

* Confirm that the signer can use Zoom with video.
* Inform the signer that the video must be recorded.
* Confirm that the document has footers on every page. “Page X of Y.”
* Confirm that the signer will be able to physically sign the document while the video is happening.
* Set up doc so that each person’s signing on a separate counterpart page.

**At the signing conference**

* Hit “record.” A few minutes of small talk are needed for the video stream/recording to be of reliable quality.
* Announce the purpose of the conference.
* Introduce the signer, notary, and the witnesses.
* Ask the signer to show her driver’s license or other ID.
* Confirm that signer is physically located in the State of Michigan (special rules apply if the signatory is not physically located in the State of Michigan).
* Confirm that each participant can hear and see the others.
* Identify the first document to be signed. State the number of pages. Have the signer hold the title page up to the camera. Have her sign. Have her hold the signature page up to the camera. Repeat for every document.
* Ask the signer to immediately send a legible copy of the *entire* document by fax, mail, or electronic means (e.g., email). Tell the signer you cannot sign the notary or witness blocks until you received that document.
* Tell the signer that you are going to review the recording when the Zoom conference is done, and that it will be necessary to re-acknowledge the documents if the recording didn’t work.

**Immediately after the signing conference**

* Confirm that recording has been saved to network drive (3-year requirement for witnessing).
* Add an entry to journal of notarial acts (only as to notarizations; 10-year retention requirement).
* Play the recording to make sure it covers all of the elements described above. If not, you will need to redo the signing and recording.

**After receiving the signed document**

* Confirm that the signer has transmitted the entire document, and that it’s legible
* Sign the notary and witness block
* Transmit a copy of the fully-signed document to the signer