

VIDEO – FULL ONLINE NOTARIZATION SESSION | BLUENOTARY

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BELOW IS A TRANSCRIPTION OF THE VIDEO BY [ELAINE WRIGHT HARRIS, PRESIDENT, TRUSTED AGENT SERVICES GROUP LLC](#).



Hi, this is Keturah with Blue Notary. And today we're going to look at a full notarization session, from sending the invitation to what it will look like when the Signer gets it, and then seeing how we can complete the session. Now I'm going to be playing both parts, so this is going to be interesting for us. So we're going to start here on our bluenotary dashboard as a notary. So I'm going to go to **New Session**.

ID	Lead	Type	Time	Action
62069	Individual Signer	RON	July, 21st 2025	Join as Witness
D17A8	Individual Signer	RON	July, 18th 2025	Pick Up Session

Today's session will be a remote online authorization. I'll click here.

Remote Online Notarization
Notarize your documents remotely in live video session.

In Person Notarization (IPEN)
Notarize your documents in person electronically with your device.

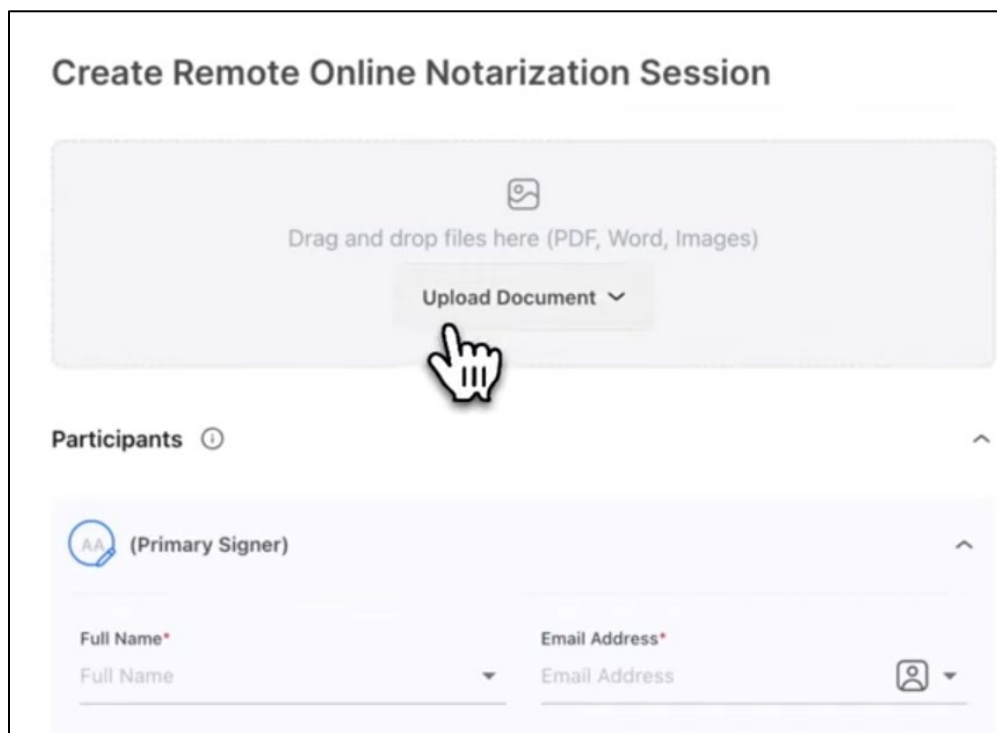
eSignature
Digitally sign and annotate your documents.

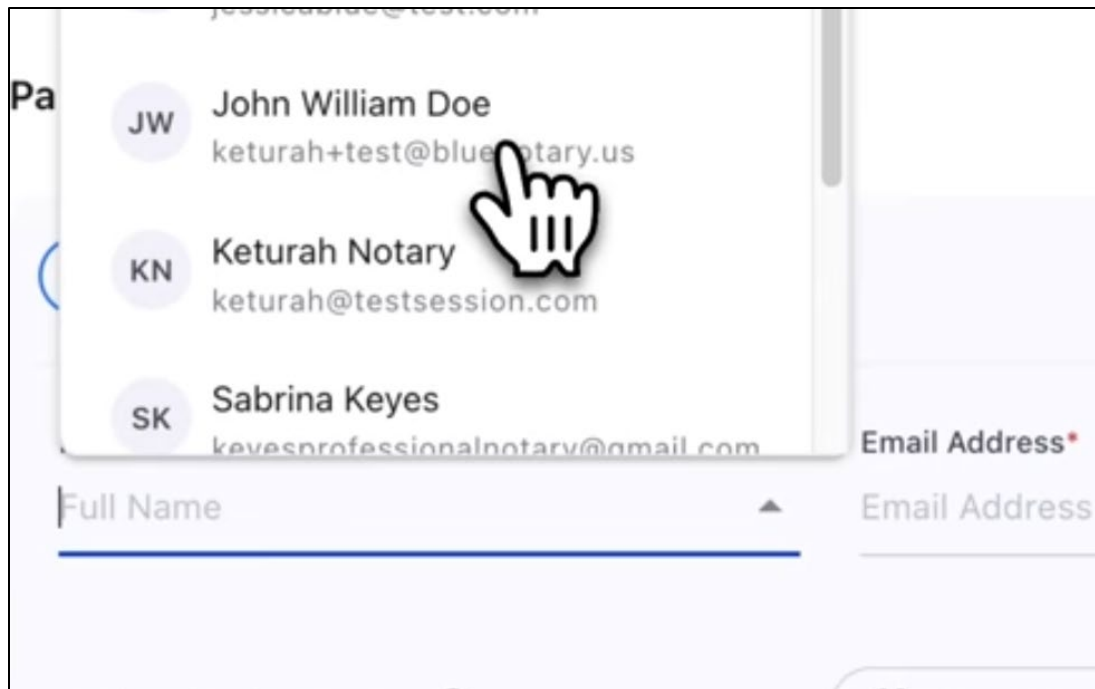
Wet Signature
Electronically journal your offline signings, get reminders and more...

I'm going to get a document to sign, so I'll do this from a **template**. I'm going to choose the **Minor Child Travel Consent Form** and **save this as the document**.

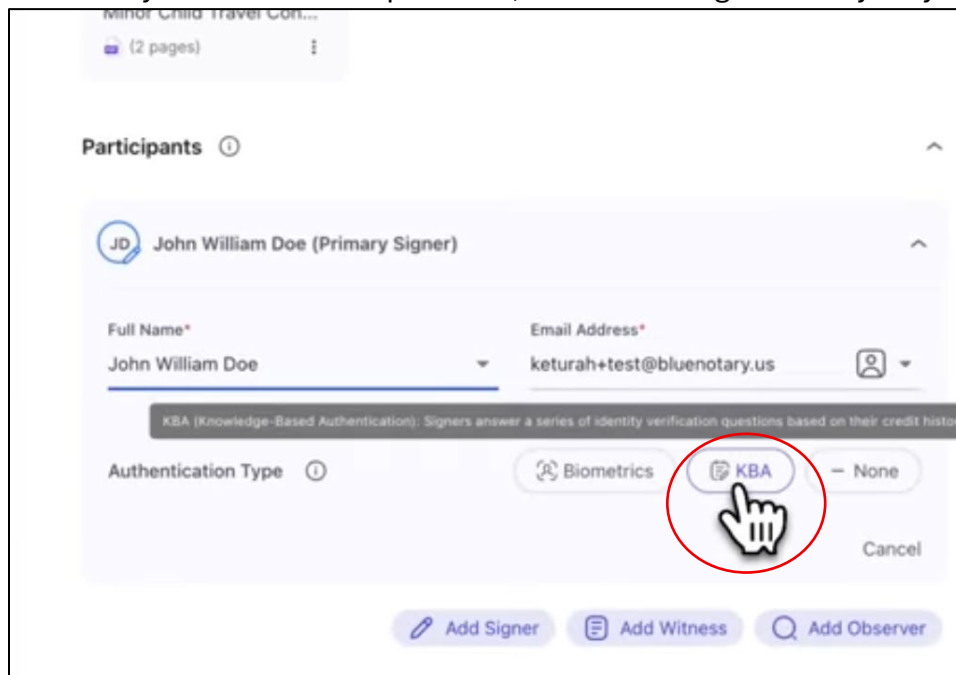


I am going to use a primary Signer that I've used before, a test Signer. So, I'm going to use John William Doe.





I want the Signer to do a knowledge base authentication at KBA, so I have KBA selected, where they have to answer questions, based on things that only they should know.



This is going to be a GNW or (a) general notary work notarization. It's going to be a (b) standard session. I'm going to have the (c) session start right away. And, I can choose to invoice the client myself, or I can have BlueNotary charge them based on whether or not (d) I check this box. So, for the sake of this session, let's say I am going to invoice the client myself. So, now I'm going to (e) send this test invitation to my Signer.

The screenshot shows the 'Session Details' form in BlueNotary. At the top are buttons for 'Add Signer', 'Add Witness', and 'Add Observer'. The form is divided into sections: 'Session Details', 'Session Schedule', 'Advanced Options', and 'Payment Info'.

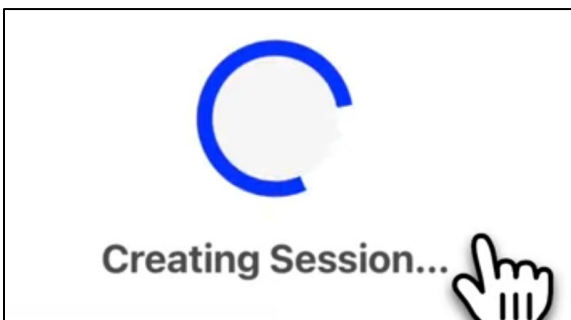
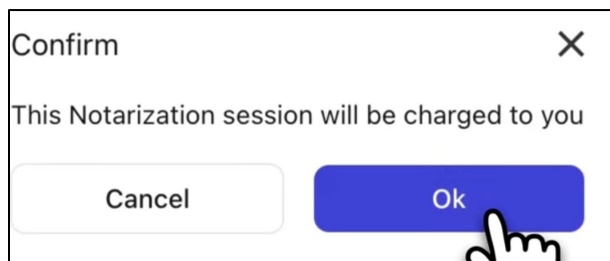
- (a)** points to the 'GNW' button under 'Session Type'.
- (b)** points to the 'Standard' button under 'Session Mode'.
- (c)** points to the 'Notarize Now' button under 'Session Schedule'.
- (d)** points to the checked checkbox for 'Invoice the client on your own' under 'Payment Info'.
- (e)** points to the 'Send Invitation' button at the bottom right.

This session has been added to my journal; it is here, right on top.

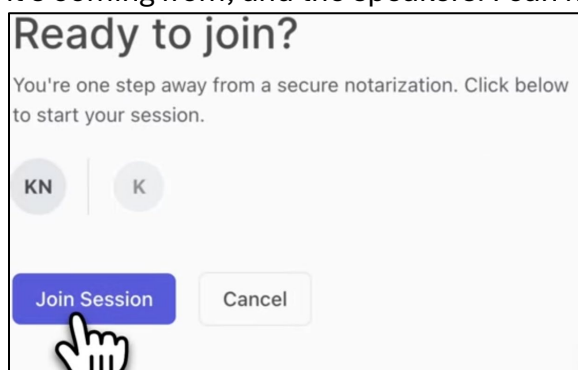
The screenshot shows the 'Sessions' page with the 'Journal' tab selected. A table lists the sessions. The first row is highlighted with a red box, and a hand cursor points to the 'Join' button in the last column of that row.

Type	Session	Client	Meeting Date	Status	Balance	
RON	22850	Keturah Notary	08/13/2025 05:32PM EST	Incomplete	\$0.00	Join
RON	B20AC	John Doe	08/13/2025 05:01PM EST	Complete	\$0.00	>
RON	1D34A	John Doe	08/12/2025 03:18PM EST	Incomplete	\$0.00	Join

So, let's see what happens when I join the session.

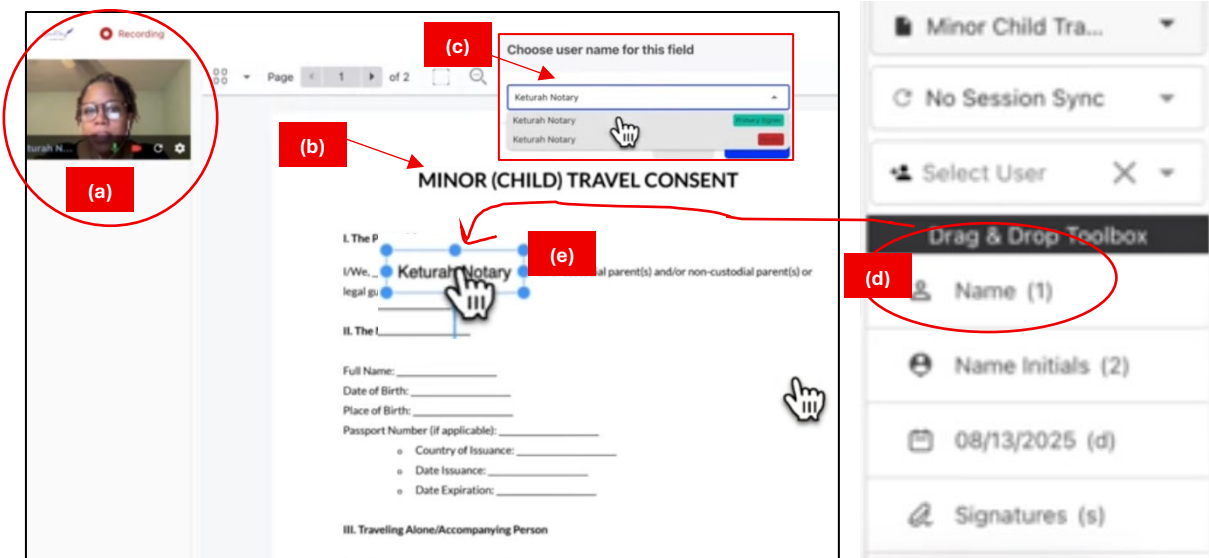


So, before I join the session, I get a chance to look at my camera, the sound [audio], where it's coming from, and the speakers. I can now join the session.



So here is my notary session. I see my (a) camera and sound (microphone) are active. I'm looking at (b) the document I want my Signer to complete. While waiting for the Signer to join, I can do something called (c) "pre-tagging". I can (d) drag and drop tags now so that, when they join, the session starts faster [and runs more efficiently].

For example, I can drag and drop the (e) name of the Signer over here. I can drag and drop (pre-tag) any pertinent information that needs to be filled out in this document.



But for this document, since we're only testing, let's just indicate where we want the Signer to sign.

V. Signature(s)

Parent / Legal Guardian Signature: _____

Date: _____

Full Name: _____

Parent / Legal Guardian Signature: _____

Date: _____

Full Name: _____

So, I'm going to bring the signature over, but instead of using the drag and drop, I'm going to use the **hot key**, which is right next to the signature and is “S”.



I'm going to **press “S”** on my keyboard, which opens the signature pane. From here, I'll select the Signer whose signature needs to be added.

Choose Signer

Keturah Notary

Keturah Notary

Keturah Notary

Primary Signer

And I'm just going to move it up. To where I want them to sign.

V. Signature(s)

Parent / Legal Guardian Signature: _____

Date: _____

Full Name: _____

Parent / Legal Guardian Signature: _____

Date: _____

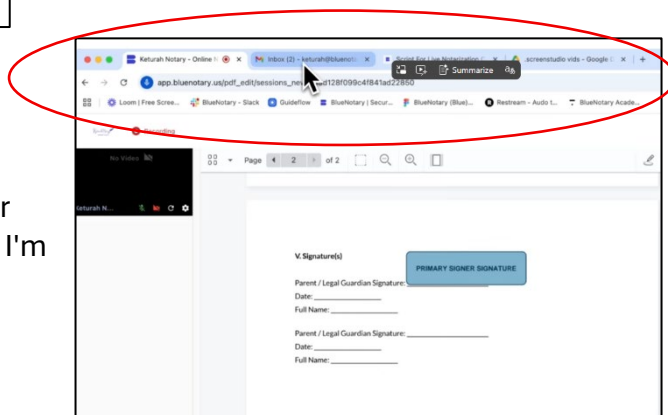
Full Name: _____

PRIMARY SIGNER SIGNATURE

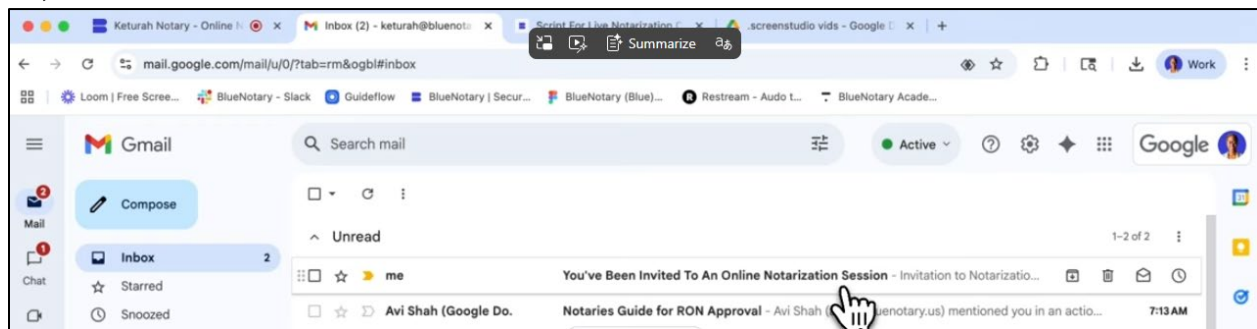
So now my document is pre-tagged. I'm just waiting for my Signer to show up.

Accessing the Signer's Session

So let's go through what it would look like for our Signers when they get invited to the session. So I'm a Signer and I've been invited to an online notarization session.



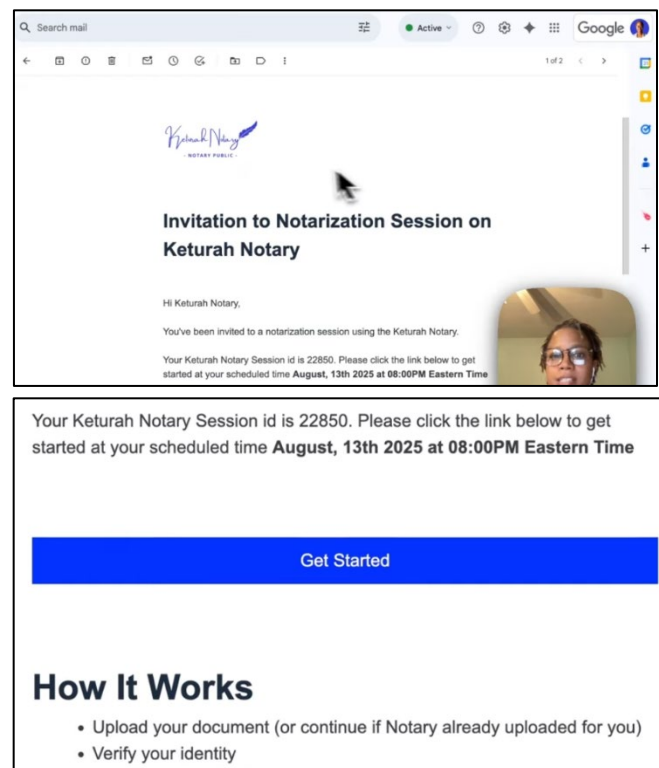
So, let's click on this e-mail.



Playing the Role of the Signer

I am the Signer and I've been invited to a notary session. and I can see exactly what notary I'm working with because their logo is right here. And this logo makes it easy for my Signer to know that I'm inviting them. Uploading your logo is offered with Notary Pro account with BlueNotary. It really helps solidify my brand with my Signers.

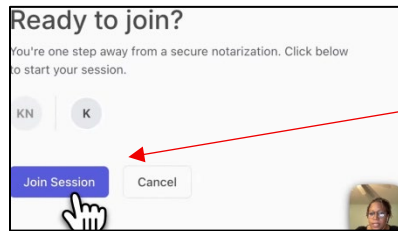
But in this notarization invitation e-mail, we have a button where they can get started right away. But, we also have some information here for the Signers, how it works and what they'll need. It lets them know what process they're going to go through when they join a notary session.



They're going to have to upload the document if they haven't already. They're going to have to meet with me via audio video. And they're also going to need a few things to verify who they are. They're going to need their government-issue ID and they're also going to make sure that their system is ready to do this notarization. It lets them know it takes about 15 minutes or less to do this.

Getting Started

As a Signer, I want to get started and have my documents signed. I'm going to press the "Get Started" button. As a Signer, I'm seeing something similar [on the monitor] as what it looks like when I'm a notary. I can see my camera, where my sound is coming from, where it's going through. I can also see which notary I'm meeting with because their logo appears here. That, along with the session ID, gives me confidence in who I'm connecting with.



As the Signer, I'm ready to join the session. I'm going to click this button here.

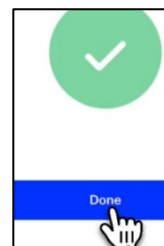
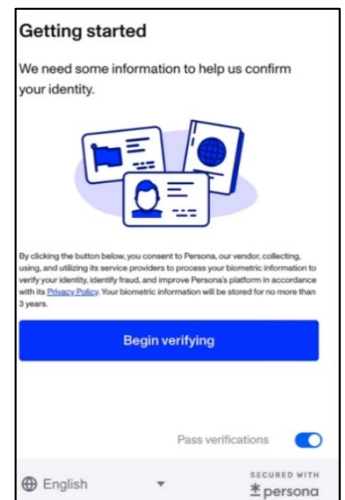
Signer is Now in Session

So as a Signer, I'm now in the session. And I can see my notary in my own picture, which happens to be me right now. But more importantly, I need to prove who I am so I can complete this notarization. So, for this knowledge base authentication, **first** I'm going to have to put in my first name, if I have a middle name, last name, date of birth, and the last four digits of my Social Security number. Then, I'm going to **press NEXT**.

Next, I also need to add my residential address details and after I've entered that, I can press **Continue**. So, part of the knowledge base authentication is answering questions that I would know as a Signer. We're going to go through this flow and answer these knowledge-based questions.

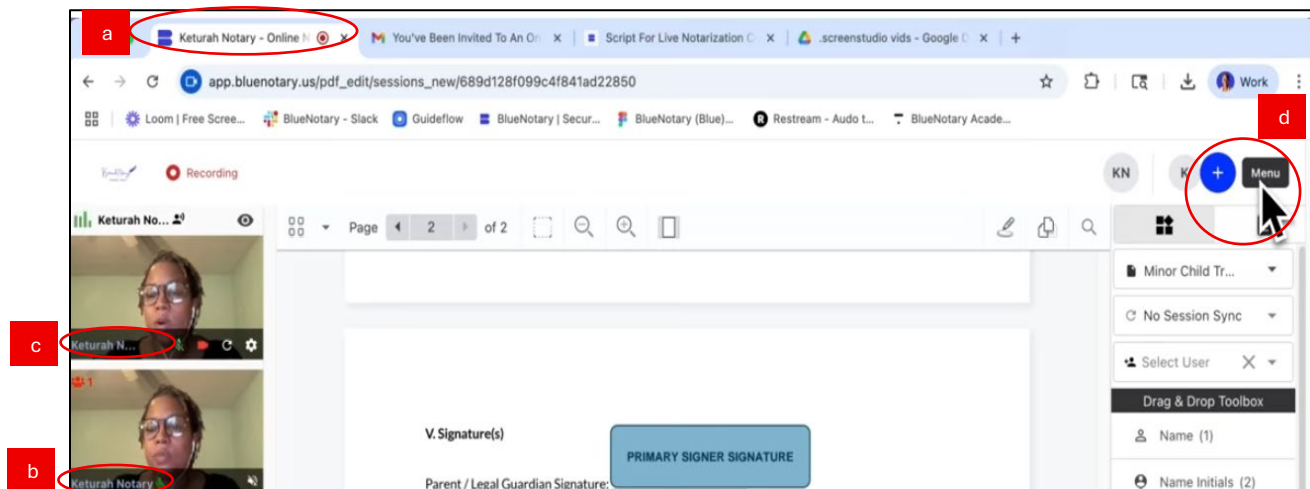
After I've answered the knowledge-based questions, **I need to verify my identity** with a government-issued ID, such as a driver's license or passport. So, let's begin verifying:

- I have to choose which country my government ID is from. I'm going to choose the United States.
- I can use any of these documents [shown]. But for this, let's try driver's license.
- As a Signer, I can take a picture of my document, or I can upload a photo.
- For this, I'm going to upload a photo.
- I'm going to go to My Documents (folder), take a picture of my license, and I want to "Use This Photo".
- I'm also going to take a picture of the back of my license and use this photo.
- BlueNotary will process that ID.
- And I'm done verifying my identity.
- **So now, as a Signer, I am in the session.**



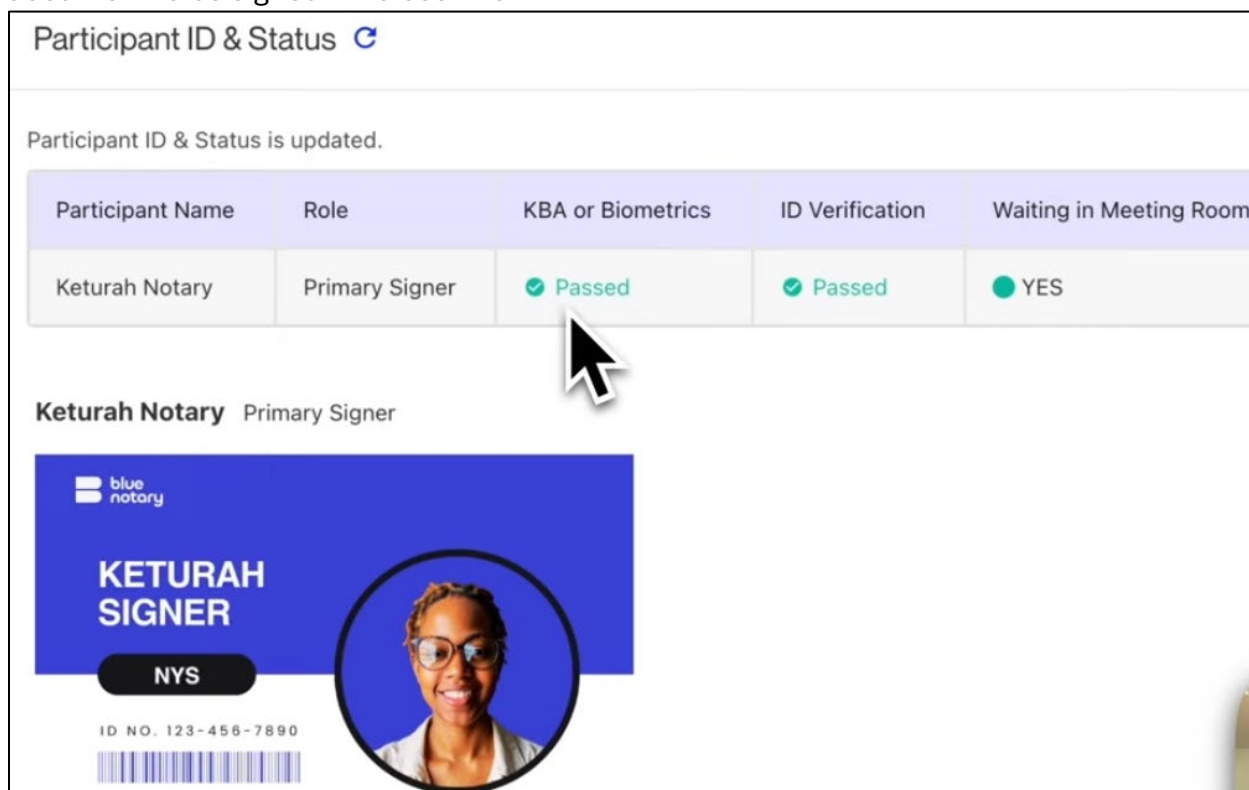
Let's Revisit What It Looks Like From the Notary's Session

Now, let's return to what it would look like for (a) a notary to conduct this session. So, (b) I [the notary] am in the session now, and (c) the Signer is in this session. Let's (d) see what their ID looks like.



Participant ID & Status

I have an opportunity to go and see what they have put in, and my Signer has passed the KBA authentication, and they have passed the ID verification, and they're waiting for their document to be signed. I'll close this.



And I want to make sure I do things quickly and efficiently. I'm going to look at the document to ensure that there are no blank spots where there don't need to be any. And one of the things that is very important is knowing what I'm going to say to the Signer.

Introduction - 'Basic' Script for Live Notarizations

(BlueNotary Script)

Blue Notary has a script for live notarizations, and these are the points I will share with the Signer during the session.

I'm going to let them know what my name is. I'm a Commission remote online notary in the state that I am in, and I'm going to say all of these things to the Signer in the session, making sure that everything is done correctly.

BLUE NOTARY SCRIPT

— Call Initial Welcome & Acknowledgement —

Hello, my name is ____.

I'm a commissioned remote online notary in the state of __. I'm authorized to notarize documents online for use nationwide. Before we proceed do you understand and consent to having me conduct a remote online notarization in [notary's state] today?

And do you understand that this notarization will be recorded?

Are you participating in today's notarization of your own free will?

Do you understand the contents of the document you are about to sign?

— When Adding Signatures —

Do you agree to use an electronic signature to sign the document?

Do you understand and agree that by signing the document you legally bind yourself to the terms of the document?

— When Issuing Sworn Statement Oath —

Since this is a sworn statement I will need to administer an oath. Please answer with I swear or I affirm.

Please raise your right hand so I can see it in the camera.

Do you solemnly swear or affirm under penalty of perjury that the statements made in this document are true to the best of your knowledge or belief? Do you swear or affirm?

You may put your hand down.

— When Document is Complete —

Perfect! We are all set with the signing. Let me take a couple of moments to look everything over to make sure there are no blanks and everything is filled out correctly. I invite you to do the same.

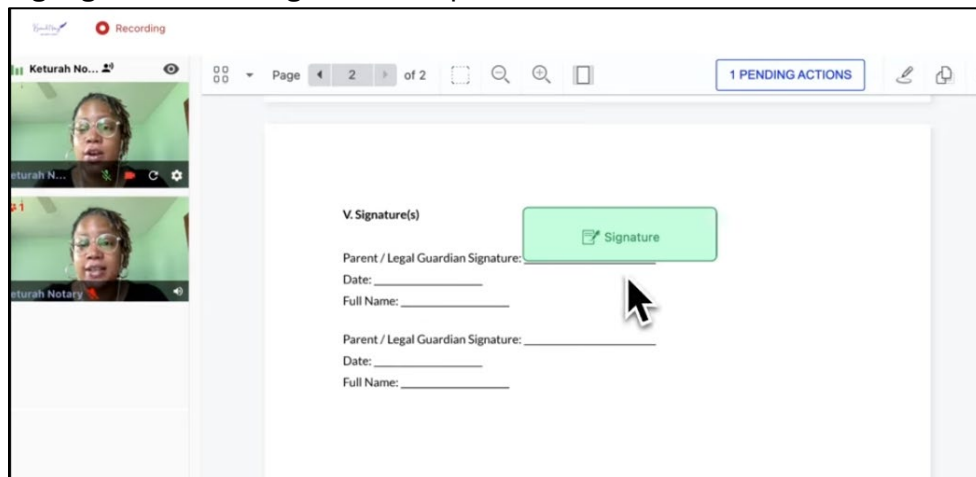
Now, we are all set. Do you have any questions for me as far as the notarization?

You will receive a copy immediately after this session and will be able to retrieve your documents anytime by logging back into BlueNotary.

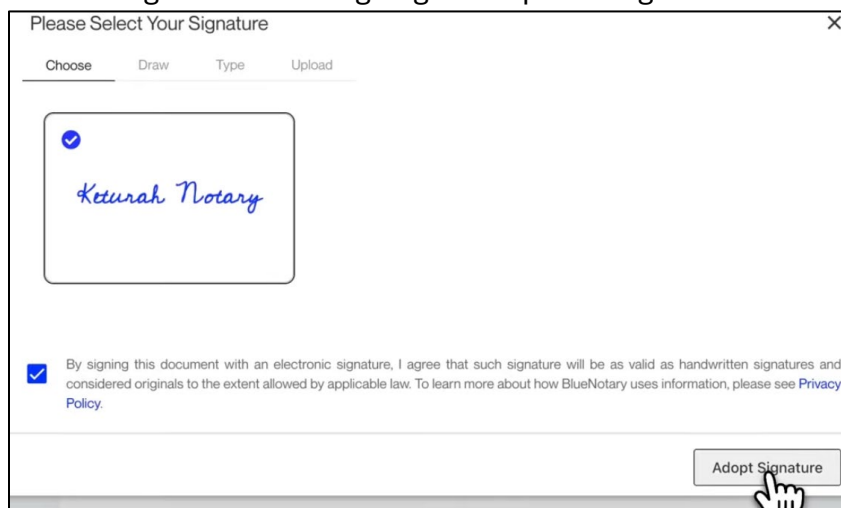
Thank you for choosing BlueNotary for your remote online notarization needs.

Continue With the Signing

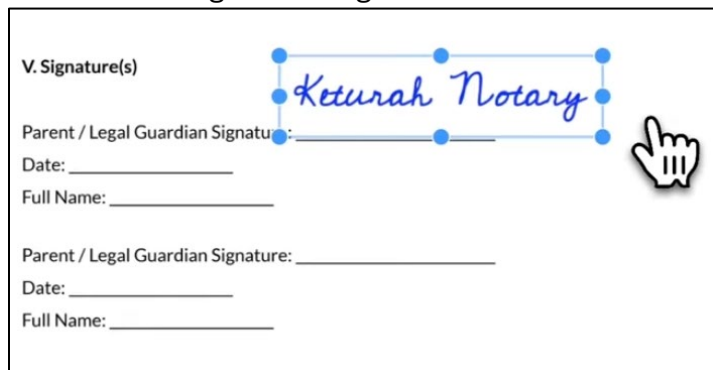
And so now that I've finished saying the live notary script to the Signer, we can commence signing. So here I'm going to switch back over to the Signer portion and ask the Signer to sign. So here on the Signer page. They can go down and you can see that there's a green box highlighted for the Signer to complete the session.



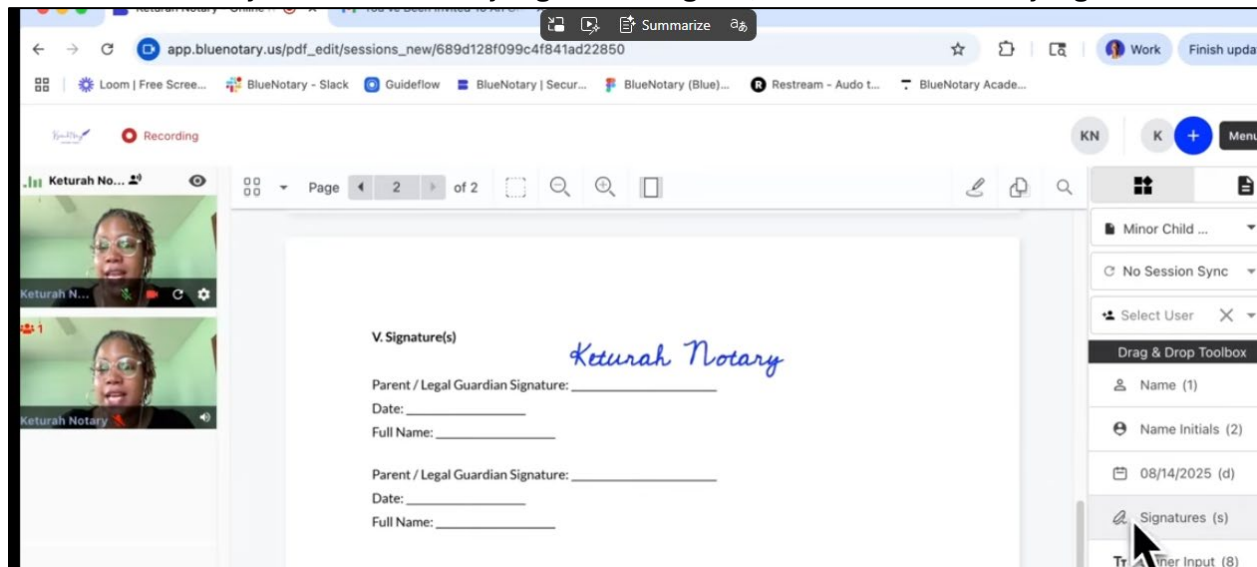
They can choose a signature that they've done already, or they can draw, type, or upload another signature. So I'm going to adopt this signature.



And now the Signer has signed.

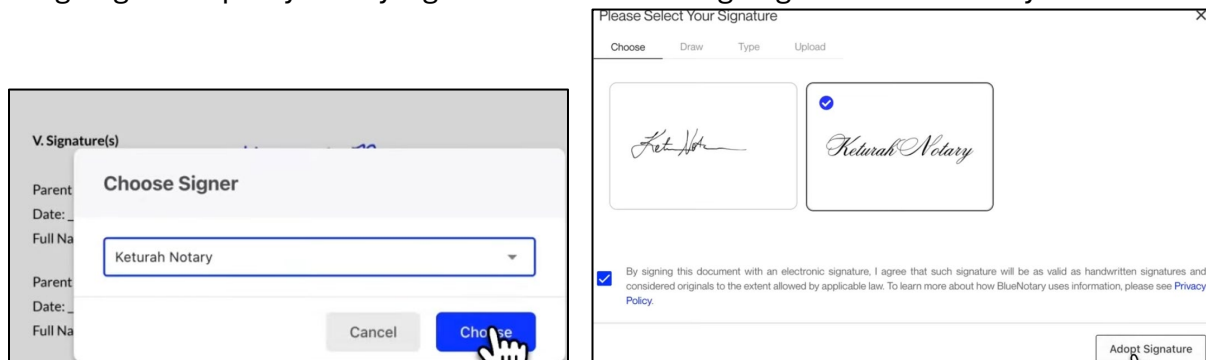


Let's jump over to the notary portion and see how I can complete it as a notary. So here I'm back on the notary side and I see my Signer has signed, so now I can add my signature.



Drag and drop the Notary signature or press the hotkey.

I'm going to adopt my notary signature. And I'm also going to use the hot key.

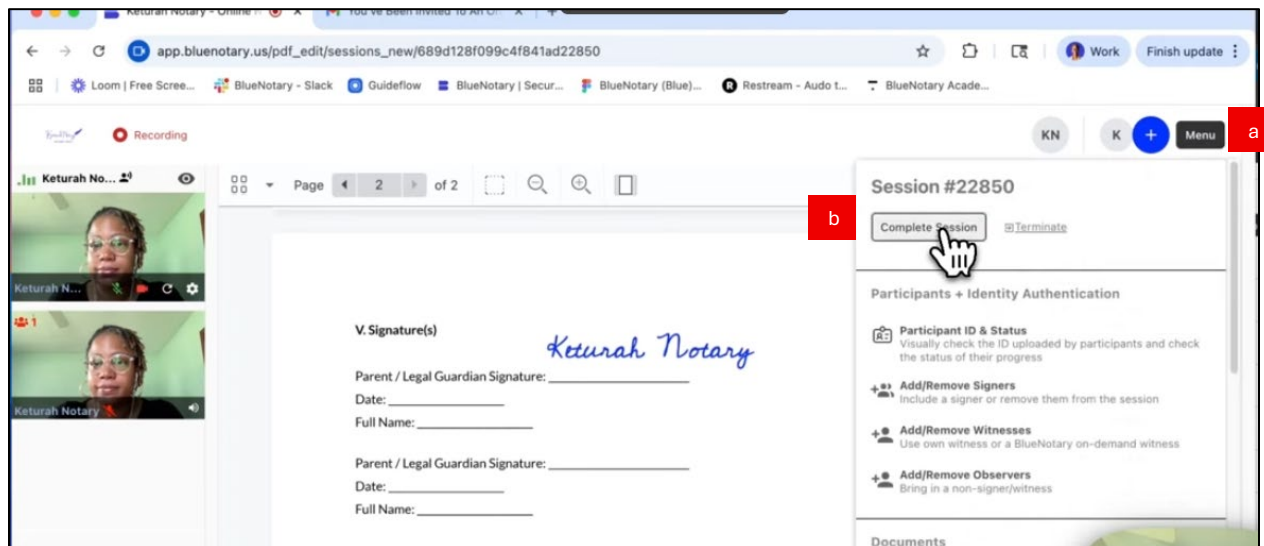


For my notary “seal”, I'm just going to type N on my keyboard. And here is my notary seal.

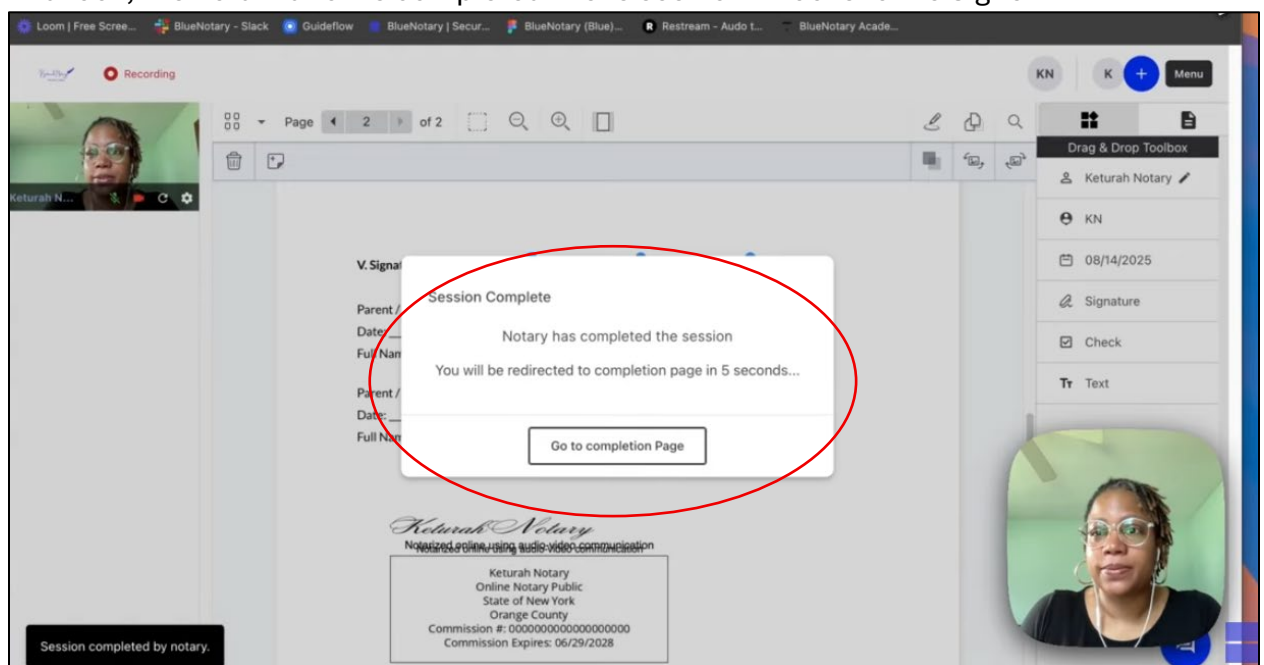
So with my signature with my seal, and now the Signer has signed, I can now complete the session.

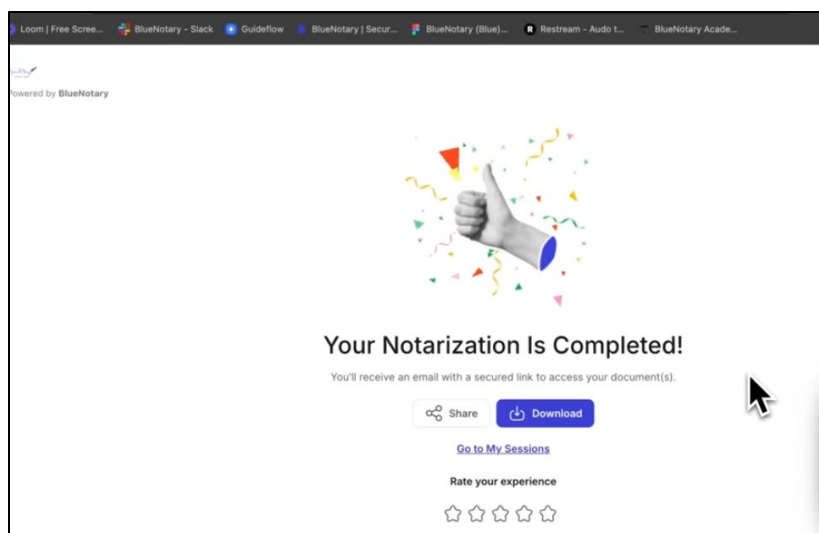


The session is completed. Let's go and see how it looks to the Signer. The notary has completed the session. *[Click (a) Menu, then (b) Complete Session.]*



And look, the notarization is completed. Let's see how it looks to the Signer.





That is the entire flow from invitation to completion of signing, from both the notary's and the Signer's perspectives. I hope that helped.

Note: This transcription is for training purposes only.

Transcribed by Elaine Wright Harris, President

[Trusted Agent Services Group, LLC](#)