

Remote Online Notarization Meeting – BlueNotary

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Hosted by Elaine Wright Harris, President, Trusted Agent Services Group

Conducted by Joey Smith, VP Notary Sales, BlueNotary

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Transcript

Elaine: I want to welcome everyone this evening. I'm really excited about our meeting—especially for those of you who reviewed the checklist I sent on February 14th and had a chance to try out the “Test with Friends” simulator. As you went through the demo, I'm sure you discovered a few things you hadn't considered before, and that's exactly why we're here. We'll cover all of that over the next couple of hours.

I also want to extend a warm welcome to the Vice President of Sales at BlueNotary. As you know, we're using the BlueNotary platform to process our remote notarization requests, and she's here tonight to walk you through key steps and answer any questions you may have.

Joey: Thank you so much. And thank you all for taking the time to join us this evening. Ms. Harris has really taken the lead in organizing a dedicated Test with Friends program just for your group, which is fantastic. We also offer a nationwide program through our Facebook community, but this customized group has been incredibly successful.

I'm here tonight to address any questions or challenges you may have encountered during your Test with Friends sessions and to help ensure you feel confident and supported on your RON journey. I'll share my screen so we can walk through the platform together.

Before we dive in, Ms. Elaine, do you have any questions you'd like to raise?

Elaine: Yes. As we progress through our BlueNotary pilot program, I want to emphasize that technological competence is essential for **performing RON confidently and professionally**. Clients will sometimes face technical challenges, and they will look to *you* to guide them through those moments.

But don't worry, we'll walk through each step together so everyone feels prepared, capable, and ready to support their signers effectively.

Joey: Yes, and practice makes perfect. Just like any new tool or venture, "practice makes perfect." And the more that you use the platform, the more comfortable and acclimated you'll be. We rolled out some exciting new features last week, and now this week as well, that'll make our jobs as notaries much easier on the platform. We will review the new features towards the end of our call.

Ms. Elaine, would you prefer that I conduct a roll call and address each participant's questions individually?

Elaine: Yes, that sounds great.

Notary: As we move through the process, one question I have is this: if someone doesn't have a partner to practice with, is it possible to run the demo by yourself? It seems like doing both sides could really help you understand the full experience.

Joey: You can do the demo by yourself. It can be a little cumbersome, but I can walk you through exactly how to make it work. When you create the session, list yourself as the signer, but use a **different email address** from the one tied to your BlueNotary account. Then, if you can, join the session as the signer from **your cell phone or another device**. That setup—computer as the notary, second device as the signer—is the easiest and most reliable way to practice both sides of the workflow.

If you only have one device, you'll need to use a **separate Chrome profile** for the signer's side. That's where it becomes more complicated. The platform won't allow you to use the same email address, and trying to run both roles on the same device can be challenging. It's possible, but it's not the smoothest experience.

Elaine: What I have learned is that practicing with a partner truly elevates the experience. A partner will catch steps or details you might overlook on your own, and that shared perspective sharpens your skills. Solo practice is absolutely possible when needed, but working with a partner remains the strongest, most effective way to build confidence and accuracy

Joey: Exactly. And then maybe you can do it by yourself. But I do suggest, highly suggest a partner. And you'll want to practice each role. So, you'll want to be the notary, you'll want them to be the notary, and you to be the signer, so you can see it from both sides. But if you must do it by yourself, please use different email addresses and two different devices, if possible.

Notary: I wanted to know about uploading our notarial certificates. I saw in one of the videos that you can pay to upload all your state certificates. As a Pro member, do we need to do that?

You do not need to pay for certificates. In fact, BlueNotary does not offer the Maryland notarial certificates, but Ms. Elaine does. To upload your certificates:

1. Login to the BlueNotary website.
2. Visit your **MANAGE** tab on the left-hand side
3. Scroll down to certificates.
4. You will see the option at the bottom to upload your own.
5. Be sure they are in an image file format (i.e., .jpg or .jpeg).
[You won't be able to upload them as a PDF. It will need to be an image file because of the layering. But you can add Maryland notarial certificates here that are available on Ms. Elaine's website.]
6. Elaine's website, [CLICK HERE – REMOTE NOTARIZATION](#)

Notary: When going through the videos, when you get to the last one, (video #9), do I click continue to go on to the test videos?

Joey: Which video are you referring to, if you don't mind me asking?

Notary: After completing the 9 onboarding videos on the BlueNotary site, should I click "Continue" at the bottom to access the simulation/test, or should I log in separately for the simulation?

Joey: You want to (1) check the box and (2) click "Continue" after the last video to proceed to the next step: the simulation/test session. Each step is listed across the top of the page.

Notary: Yeah, because I thought maybe it was this computer. So I logged into another computer, but it was still doing the same thing. So yeah, that's what it was. And on my screen, it shows the camera's on and the lights on, but I'm not seeing any picture.

Joey: All right, I will get back to your question. You have finished two of the four requirements for the onboarding. You'll see where you have a little checkbox that says that you have completed watching the video series. You'll need to check that and then click continue and it takes you to the next step. I'm happy to follow up with you one-on-one after the call tonight and we can touch base and make sure that everything is aligned for you.

Notary: I tested the simulation on a few different devices, and I kept running into audio feedback each time. I know it's challenging to run the simulation on the same device, so I also tried using my iPad and my phone, but the feedback continued. Are there any solutions or recommended setups to help reduce or eliminate that issue?

Joey: If you just mute one or the other, you won't get the feedback. You don't need to communicate with yourself through audio and video.

Notary: This week, I ran into two issues. First, I'm still waiting for the Secretary of State to finalize my RON approval on the BlueNotary platform. I submitted my RON request some time ago, but BlueNotary wasn't on the approved vendor list at that time. That meant I had to resubmit my request, and now I'm waiting for the second email confirming approval specifically for BlueNotary. My second delay was with my business bank account, which I'm also waiting to finalize.

So, once those two issues are solved, I'll be ready. I tried to do both the notary and client roles, but I had a difficult time. I talked to you about that, the feedback I was getting.

Joey: Same thing. If you're trying to do it with yourself, it's not ideal. Did you sign up for Miss Elaine's partner program?

Notary: Yes, I did. So as soon as I get those other two items in place, then I'll be ready to reach out to one of those on the list.

Joey: Because you're not actually notarizing documents with the 'Tests with Friends' or just practice tests, you can do that right away. You don't have to wait for your approval. You don't have to wait for your bank account for your Stripe. You can do that right away.

You're not fully approved to do RON, but if you use our 'Tests with Friends', which is located on the HOME PAGE towards the bottom, as opposed to using the 'New Session' option. You will be able to do 'Tests with Friends' sessions. What you will not be able to do is set up a new RON session, which would be a true notarization.

Notary: So, one question, one thing I noticed when I was doing the test with friends is that there is no template for people with the **Basic Plan**. Like on the drop-down, when you had to pull out the template, like you wanted to test, like a document. I was unable to obtain a document to test with. I had to upload a document to use, my own personal document to use.

Joey: So right now, you are on our **Basic Plan**, which is our free plan. And that plan does not allow you to add templates to the template library. Our **Pro Plan** allows you to add templates and add those customized templates. But the way to work around that, like you stated, is just to add the document on your own. So that would be the only solution on your **Basic Plan**.

The Virginia Secretary of State charges a \$45 fee for an RON application. But I'm having difficulty maneuvering and setting that up with them.

Joey: I get a call about that 3 times a week. What I would like to do is email you personally at the end of this call, and we'll connect if you're available tomorrow. I've got several time slots available. I will walk you through that process because they don't give us a lot of insight on how to do the actual application signature page, and that hangs up a lot of people. Do you have your **digital certificate through Identrust?**

Notary: No.

Joey: Okay. I'm going to reach out to you by e-mail. We'll need that before we can get started. **Virginia only allows us to use IdentTrust digital certificates.** I'm going to reach out to you and connect, since our situation is a little bit more unique because we're here in Virginia.

Notary: I have a couple of concerns. I couldn't quite figure out how to share my screen during the sessions I completed, so I wasn't able to stay on the same page as my partner. I'm also wondering whether there's a way to use something like a laser pointer or on-screen indicator to highlight the exact area I'm referring to, which would make it much easier for both of us to follow along. Is it possible to have screen sharing?

Joey: I think what you're asking for is **how to sync the document so that as you're moving through it, it moves your signer through it as well**. The **screen share feature isn't available** to us at this time.

The sync feature allows you to control the screen so the signer sees exactly what you're seeing, and you can guide them through the document as you move from page to page. It's not a tool I use often, but I'll pull up the details so we can walk through it together.

For highlighting or pointing out specific areas on the document, the sync function is likely your best option. It lets you direct the signer's attention by navigating to the exact spot where they need to sign or click. As far as an actual on-screen pointer, I'm not aware of a dedicated tool for that.

Okay, so in the **upper-right corner of the session simulator, you'll see this option labeled "no session sync"**. Okay, so in the upper right-hand corner under the toolbox, you see no session sync. If you drop that down, you can sync the screen, or you can sync the screen and the cursor.

Screen share, because you're using the camera and the video, I'm not sure that we would be able to enable a screen share perhaps. Okay. But I can only ask if that's an option or if that's something that they're working on. But I think that the sync is going to be beneficial for you so that way, again, you can control that meeting.

Notary: The one thing I've had a question about is when we're doing the practice or the simulator. Is there a way that we can access the **notary script**? And then also in part two of that is they said that you could find your state's script on the Secretary of State website. And I wanted to know where, if that's such, you know, if you can do that.

Joey: That is a great question. **We have now embedded the script into the actual session itself.** So, right here on the right-hand side, where it says Call Script, clicking it will open your script right here. You can customize this to your state's requirements under your MANAGE tab. And you have everything that you need right here at your fingertips.

We did make it customizable at the individual level, so you can go in and make changes and add any additional content you'd like. You can find that under your MANAGE tab.

Notary: Okay, so, and so in other words, you're saying, if I'm understanding correctly, that during a notarization with a client, we will be able to pull that script up.

Joey: Yes, ma'am. Clicking on the **Call Scripts** panel on the right-hand side will drop into place for you. You'll see several **other categories or line items you may need, including the sworn statement or oath.** Everything you need is organized there and easily accessible at your fingertips.

Elaine: Joey, I have a question. Maryland's script is a little different. Can we upload our script there? In Maryland, we can administer three verbal declarations.

Joey: So, you'll go to your MANAGE tab right here on the left-hand side of your HOME PAGE. Scroll down about halfway, where you're going to see your call script. And this is where you can customize and add additional line items. You can also add additional categories. So, everything you need is right here at your fingertips. And you can make this as customizable as you'd like. And then you'll just be sure to click SAVE after you make any changes so that it updates your platform.

Notary: Elaine, will you have the script on your website?

Elaine: Yes, click - <https://trustedagentservicesgroup.com/remote-notarization>

Notary: As far as your platform is concerned, is the ledger included as well, or is that something you have to pay for separately?

Joey: The ledger is included for free with the Pro Plan or can be purchased separately with our basic plan.

Notary: Do you have to be experienced doing RON in order to be accepted by BlueNotary? Can you clarify that?

Joey: I believe you're referring to the LSA program. For that program, we typically look for notaries who have completed around **50 transactions**, because we want to ensure you have a solid foundation of RON experience before we begin assigning loan closings. It's a competitive space, and at this stage, there are **more notaries than available signings**, so we want to be transparent about how selective the process can be.

That said, the platform is truly designed to help you **build your own RON business** and serve your own clients, which is where you'll see the greatest profitability. While you may receive some opportunities through BlueNotary, we are not a signing service, and we don't want anyone relying solely on platform-generated assignments.

If you'd like to complete your application, let me know once it's submitted. I can connect with the team to review it and determine whether any exceptions or next steps are appropriate.

Notary: I previously had a BlueNotary account. How can I transfer everything under Elaine?

Joey: I'm going to go ahead and add you manually to Elaine's list and you will receive the discount code when upgrading to the Pro Plan.

Notary: And one last question. When we're sharing our screen, can the client see the actual script?

Joey: No, ma'am. The signer will not see the script. And if you need to contact Live Chat Support, the client won't see that either. When you run a Test Session With Friends and the friend join as the signer, they only have a limited set of options on their end, such as adding their name, signature, initials, or uploading documents. They will not see everything you see on your screen. Their menu on the right-hand side is much more limited than the notary's view.

Notary: And what's the purpose of AI? If we have questions, is the AI there to assist?

Joey: The new AI tagging tool will automatically tag your documents for you. It's especially helpful for real estate transactions and estate planning packages because it goes through and adds all the required tags for you. While AI isn't perfect, it's a tremendous time-saver, and so far, it has tagged every one of my transactions accurately.

You can still manipulate things if needed. You can still add things and take things away, but it really does expedite things like crazy. And I cannot recall who it was on our first call, I believe it was back in December, who said she was already with BlueNotary, and one of the downsides was that we couldn't pre-tag for the seal and the notary signature. Well, now you can. So, we got that fixed. We are very excited about the changes.

Notary: Can you show us a demonstration of that, how it does it? Yeah, that would be awesome.

Joey: It might be a good idea that we have another session for that. We want to make sure we get through everybody's questions. I'll send everyone an article that kind of outlines the AI process for you. And then we can connect individually if needed.

Notary: I have two notary, BlueNotary accounts, one for Pennsylvania and one for New Jersey. How can I switch those to Miss Elaine's program? Or do I need to?

Joey: The monthly one, we would be able to apply the discount to, but the annual one, we would not be able to retro that.

Notary: And then I wanted to find out about the e-seal. I had purchased a lifetime seal, but I think there were updates that were made that it's no longer lifetime, so I just wanted to speak to you about that. So I can e-mail you all my questions that I have and then.

Joey: If you don't mind sending that over, I can take a closer look. The lifetime seals we previously offered were valid for about three years, so I'll review what you purchased and confirm the details. As a Pro Plan member, you already have an e-seal included on your account at no additional cost. Any seal you purchased separately would have been for use on another platform outside of BlueNotary.

Notary: I guess once I get started, I'll have more questions. I did have a concern. Well, not a concern, but how secure is the platform with the documents? I know that you're not. PDF compatible, but you use the JPEGs for your certificates.

Joey: I'm not completely sure what you mean by "PDF compatible." Are you referring to the notarial certificates? The reason we require the certificate to be in **JPG format** is because the platform adds it as a **layer** on top of the existing PDF. You can't layer a PDF on top of another PDF, but once the document is finalized and locked, the entire file becomes a standard PDF again. So the image requirement applies only to the individual certificate you're adding to the document. Regarding security, we are **SOC 2 certified**. Are you familiar with SOC 2?

*[SOC 2 certification is a **widely recognized security and privacy standard** that evaluates how well an organization protects customer data. It was created by the **American Institute of Certified Public Accountants (AICPA)** and is built around five Trust Services Criteria: **security, availability, processing integrity, confidentiality, and privacy.***

(<https://secureframe.com/>)]

Notary: Can screen share be enabled when performing RON notarizations?

Joey: Because you're using the camera and the video, I'm not sure that we would be able to enable a screen share. But I think that the sync option is going to be beneficial for you so that way, again, you can control that meeting.

Notary: I have a question - when we're doing the practice or the simulator, is there a way that we can access the script?

Joey: Okay, let me try to share the screen again. All right, so that is a great question. We have now embedded the script into the actual session itself. So right here on the right-hand side, where you see "call script"? If you click on that, it will open up your script right here.

Now it shows the Quit Claim Deed.

Correct. On the far right-hand side, next to your toolbar, you'll see the options for your tools, your script, and the new AI features. The script is located right there. It used to be in a different tab, but we've now embedded it directly into

the meeting interface. You can customize it to meet your state's requirements under your **Manage** tab, and everything you need is right at your fingertips

Ms. Elaine has some state-specific information posted on her website.

Notary: Okay, so, and so in other words, you're saying, if I'm understanding correctly, that during a signing, we will be able to pull that script up.

Joey: Yes, ma'am. If you just click right there on the right-hand side where it shows call scripts, it'll drop into place for you. And you do have different categories of things that you can drop down. If you need the sworn statement or oath, you can drop that open. Everything is right at your fingertips.

Elaine: Maryland's script is a little different. So, can we upload our script there? We can administer up to three verbal declarations. So, can we upload our own there?

Joey: So you'll go to your MANAGE tab right here on the left-hand side of your HOME page. And then you're going to scroll down about halfway, where you're going to see your CALL SCRIPT. And this is where you can customize and add additional line items. You can add additional categories. So, everything you need is right here at your fingertips. And you can make this as customizable as you'd like. And then you'll just be sure to CLICK SAVE after you make any changes so that it updates on your platform.

Notary: I was thinking of becoming a multi-state notary. I'm in Maryland. What if I wanted to add D.C.? Do you need a BlueNotary account for each state, or can you combine them into a single account?

Joey: We recommend having a different account for each state. You'll also want to confirm with that state that you can do a dual commission, and keep in mind you have to be PHYSICALLY present in that state when you're doing RON under that commission. There are a lot of moving pieces, and you'll need to check with the Secretary of State to see if they'll allow for that.

And Shelly just gave us some great feedback that D.C. doesn't currently allow for a full RON at the moment. So, Shelly, thank you for that insight. I appreciate that.

Joey: Some states allow for RIN or IPEN without actually doing RON. I'm wondering if D.C. kind of falls into that area as well.

Shelly: That's correct. DC has not authorized RIN or RON.

Elaine: Oh, I see. No, D.C. doesn't do RIN at all. Not very many states do RIN. I want to announce to everyone that RIN will be part of our program over the next six to seven months. RIN is Remote Ink Notarization. But we'll get to that.

Notary: I have a question about how the signer will send me their document so I can review it and pre-tag it before the meeting.

Joey: So, typically, the way that I prefer to do things is to ask them to send me the document by e-mail, and I set the session up myself.

So, we're looking at the BlueNotary HOME PAGE now. So you would set up the NEW SESSION in the top-left corner and select the RON option, which is, of course, remote online notarization. And here you can add the signer's documents. **Again, I prefer to get them in advance through e-mail so I can set the session up myself.** I would add them from my desktop, where I store them. I would add the signer's name and e-mail address. Choose the authentication type. Your state allows for KBA. My state also allows for biometrics. And then I would make sure it's set to the correct session type, session mode, and scheduling. Under ADVANCED OPTIONS is where your new auto tagging with AI. So, you would enable that if you want the AI to set up the meeting for you.

So, I'm not able to go through the whole process because it's going to send Rohit?? an email, but I think I'm going to send out a video or article at the end of the call about the new AI auto-tagging. But this is how you'll set up the session with the signer's documents. Once you've created the session, you'll see it in your JOURNAL, where you can join to pre-tag the document if you'd like, just by opening it here in your journal.

Notary: I went on to training and viewed several video sessions. And I found myself in a section of the video that had a fee attached. I didn't want to be in that section, paying for the training videos.

Joey: Your courses [Pro Plan] are included for free. Did you reach out to our live chat support, as I suggested?

Notary: I was asked to send a copy of the screenshots of the page where I was. So those videos should be a part of the package, or are they optional?

Joey: The advanced training videos [less the Blue Mastermind] course are included for free with your Pro Plan. So I was not able to duplicate the screen that you were seeing, which is why I asked you to reach out to our live chat support, because my visibility is somewhat limited, where they can get into your account and find out why it's not or why it's asking you to pay if it's asking you to pay. They're available from 7 a.m. to 9 p.m. Central, seven days a week. Please don't hesitate to utilize the live chat support. I know sometimes there can be a delay in my responses because I am in meetings every 15 to 30 minutes, 10 hours a day.

Notary: How many RON signings would you need to do before you can do closings?

Joey: For your own clients, you are an Independent Notary. This is your own business. If you feel confident and comfortable and prepared to do loan closings, you are able to do them as soon as you get approved on the platform. Again, that's a program that we're really ramping up. We have a lot of notaries signed up for that program and not really enough volume to go around to make a huge impact. You are not going to be paying your mortgage at \$30 a closing. So, **I do recommend diving into the training and using BlueNotary as a tool to support and grow your notary business, rather than relying on the open calls or the LSA program we have.**

Elaine: You were showing us how to do the pre-tagging and then join the session from the JOURNAL. What I'd like to emphasize is that when we're conducting our test sessions, we don't go to the NEW SESSION [upper left], we go to TEST WITH FRIENDS [bottom right]. I want to make sure everyone understands that. Because you have to pay for the NEW SESSION and we don't want to pay while in the testing phase. The NEW SESSION is a true RON session. So until you're ready, you're going to be using TEST WITH FRIENDS.

Joey: Correct. You'll go to TEST WITH FRIENDS.

Notary: Okay, I have a few questions, but the first one is sort of technology-related. Do you have a browser that is really compatible with your site? And the reason I'm asking is that yesterday, when I was going through a mock signing, my computer basically just shut down. And that has never happened before. So.

Joey: Okay. Were you using Google Chrome?

Notary: No, it's using Microsoft Edge.

Joey: Okay, so we always suggest **Google Chrome. That is the best browser that's most compatible with many apps.** So please try that with Google Chrome. I can't explain why the computer itself would have shut down. That would be more of a hardware issue. But as far as the platform itself, I always recommend Google Chrome. I'm looking at your account and see it wasn't set up using Ms. Elaine's participation link. I'm going to fix that for you as well, okay? So that's all taken care of for you.

Notary: Since I'm on the Pro Plan, is there any additional training available?

Joey: Okay, so with your Pro Plan, you do get ACCESS TO ALL OF THE ADVANCE TRAINING COURSES except for the Blue Mastermind course, okay? That one would have to be purchased separately. I'm not sure if you purchased that or not. **But a great place to start is your How to Use Blue Notary Quick Start Guide, and then move on to the RON Essentials Training Course.**

So just to clarify for everyone here, **your subscription is separate from your invoicing.** They're two very different animals. Never will the two intersect. Your BlueNotary subscription is billed to the card you provided. Your invoice to your clients will come through your Stripe account. And on the Pro Plan, when you set up your sessions, it defaults to invoicing your client on your own. **If you do not uncheck that box, you are going to be responsible for doing the invoicing.**

Notary: Okay, I'm set up for Stripe. What button do I not push, or do I push so it'll go directly to my Stripe?

Joey: So, **invoicing your client on your own is going to be clicked by default.** So as long as you don't uncheck that box, you'll have control over invoicing. When you set up the session, it's going to default to invoicing the client on your own. So we'll leave that as is. When you're ready to actually create the invoice, you can do so from the JOURNAL. So, let's find a completed run session. So, you'll go into the session, and right here in the center, you see the option for Stripe invoice. If you would like to use our Stripe invoicing tool so

your client can pay you directly through Stripe, you'll simply just click on add invoice and set the fees.

You can add additional line items if you'd like. Once you have everything aligned, you'll simply click create and send invoice, and it will send your client the invoice, which they can pay directly to you through your Stripe account.

Notary: What is BlueNotary's actual charge as far as for us to use the platform when we're working with our clients?

Joey: We're going to go over the platform fees, just a moment. For general notary work [GNW], your session platform fee will be \$5 for the first seal. We do not charge you for additional seals. You can charge your signer per signature or per seal. Your cost will not go up.

If you have a second or subsequent signer or witness who needs to be authenticated, it will be \$4 extra per person.

If your witnesses do not need authentication, which will be determined based on the notarial language, then there's no charge. You can invite as many witnesses as you need. It's only if they need the KBA.

If you're doing a real estate closing, that is a flat rate of \$25. And if you need to have another notary join you through our open call program as an on-demand witness, that cost is billed to you at \$10 per witness. **Most of my notaries pass that cost along to their signers, and many of us, myself included, do mark that up.**

So those are available on our pricing page of the BlueNotary website. I'll be happy to send the link to that page as well at the end of the call.

Notary: I do have a couple of questions. And the first one is, how do you get back to a session if you get kicked out?

Joey: You go back and join your JOURNAL again.

Notary: I have the Pro Plan, and if the person that I'm practicing with has the Basic Plan, does that make a difference?

Joey: No, ma'am. **When you, the notary, leave the session**, you'll need to select your options under your MENU TAB. In an actual session, you're going to have three options.

1. You're going to have 'COMPLETE SESSION', which ends it for both parties.
2. You're going to have 'SAVE AND EXIT', which ends it for the exiting party.
3. Or you're going to have 'TERMINATE', which ends it for both parties.

If it ended up stuck in a limbo state when you clicked Save and Exit, it means the session never actually closed. To fully clear it for everyone, you'll need to either COMPLETE it or TERMINATE it. Until you do, the signer can still re-enter that session and sit there indefinitely because the system still treats it as open. **Choosing COMPLETE or TERMINATE will fully shut it down and prevent the session from lingering.**

Notary: How do you get your account approved? Do you have to go through all of the steps and complete the training? And what's the process for that?

Joey: Are you referring to becoming approved just to use the platform? Okay, so I'll be happy to send out the Quick Start Guide again at the end of this call.

But you should see three onboarding tiles across the top of your screen on your HOMEPAGE.

1. The first is going to ask for your RON approval document. So that's going to be the e-mail from your Secretary of State saying you're approved.
2. The second will ask for your Stripe Connect, so you'll connect your Stripe account.
3. And then the third is going to be for your notary profile details. That's going to ask for your
 - a. name
 - b. commission number, if you have one
 - i. If you don't, use NA, please.
 - c. Commission expiration date, city, and state.

Once we have completed those three items, our team will review your account.

Notary: If I set up my Stripe account as an individual and then want to change it to a business later, can I do that?

Joey: To make those changes, go to **Settings**, then **Payouts**, and open your **Stripe dashboard**. From there, you can either disconnect your current Stripe account and reconnect a different one or make updates directly within Stripe.

If you're switching from using your personal Social Security number to an **EIN**, you'll need to disconnect your existing personal Stripe account from the Stripe dashboard first. After it's disconnected, return to this page and reconnect. The system will recognize that no account is linked and walk you through the setup again. When you reconnect, be sure to enter your **business name exactly as it appears on your EIN letter**—Stripe is very particular, and any mismatch will be rejected.

Notary: When I go to the training section, I also see the dollar amounts there. So that's why I haven't actually touched any of the training because I'm like, well, I've already paid for the Pro Plan, I'm not paying for more training.

Joey: I appreciate that feedback. I've sent a message to my tech support team already to let them know about this.

Notary: With regard to the timing of payment from the client, can you schedule the payment so you are paid before notarizing the signer's document?

Joey: Yes. That's actually how many notaries handle their sessions—I do the same. When you set up the session, go into **Advanced Options** and switch the **Document Delivery** setting to **Manual**. We're actively improving this workflow based on user feedback, but for now, the manual setting gives you control.

Once the session is finished and the signer has paid, you'll go to your **JOURNAL** and release the documents from there. That ensures nothing is sent out before payment is received.

We're also developing a more automated solution for this process and hope to roll it out within the next couple of weeks.

Notary: I have a couple of questions. The main **issue is with the onboarding**. I'm running into a problem because I have Norton 360, and it keeps blocking

the simulator's URL. I've gone through all the proxy and firewall settings, but I still can't get the simulator to load. I even tried using my iPad. When I open the simulator, it only shows my video feed, and none of the controls appear at the bottom. I did the "Test With a Friend," and everything worked fine on my laptop, but in the simulator it just shows my picture and nothing else.

Joey: This is very peculiar. I would have you reach out to our chat support to see if they can help.

Notary: I was chatting with someone from the support team earlier, but I had to step away. They asked me to take a screenshot because they were able to pull up the issue on their end and confirmed it was an alert. When I tried to mark the link as safe, Norton told me to give it 24 hours. I've waited several days now, and it's still blocking the simulator the same way. At this point, I'm stuck because it still won't let anything through.

Joey: Firewall is preventing you from being able to access. Okay, and you're not running a VPN, correct?

Notary: No, I'm not.

Joey: That sounds like Norton may be best suited to help you, but our tech team is very knowledgeable, so they may know a workaround if you can follow up with chat support. They can definitely unpack that for you.

Notary: Okay, and I even tried it on Chrome because I use Edge, and I was like, well, let me try it on Chrome, same thing, it's the laptop, it's the device itself.

Notary: I'm doing a TEST WITH FRIENDS. She gave a story where the client or customer was in a public place with people walking behind them. And you see them walk across the camera, and because it is recorded, is that okay?

Joey: I know that here in Virginia there's nothing in the notary statutes that prohibits it. In fact, it's fairly common to see other people moving in the background during a remote session. As long as the signer remains fully visible, isn't obstructed, and doesn't move off-screen, I generally proceed without issue. Your state may have specific notarial language that addresses this, but it's unlikely that there's an outright prohibition.

Wanda Moore: Can I chime in on that a bit? In a situation like that, it is really, the notary should find a spot within that public place where you can minimize

that kind of activity so that it does not get recorded. Even if it's not getting recorded, you need to find a place where no one can look over your shoulder or anything like that.

Shelly: Can I comment on that? I recently had a signing with a couple whose young child kept wandering into the camera view. I simply reminded the parents that the session was being recorded and that, if the video were ever needed for a hearing or trial, anything captured on screen would be included. I left the decision to them, and once they understood, they made sure their child stayed off camera for the remainder of the session.

Elaine: I will check a little further and get back with you on what is best practice in that type of situation.

Notary: Loan Modifications. Do you notarize, using your notary stamp or are you using your TIPIC stamp?

Elaine: You use your notary stamp for any document that has to be notarized. The TIPIC stamp is for the DEED OF TRUST, and assuming that the property is in the state of Maryland, because this is a law. And also assuming that it has to do with the issuance of a title insurance contract. We have found that sometimes an owner might be doing a refinance, and the bank sends the package directly to the owner and requests that they get a notary to notarize the package or document. Loan Modifications are not considered a 'purchase' transaction and have nothing to do with the issuance of a title insurance contract. So, we don't have to use our TIPIC stamp on Loan Modifications.

Notary: Okay. I think that was more of what it was, a refi. And that was the question, which stamp are we going to be using? Well, of course, the notarization stamp, but being that it was related to the house to a mortgage, do we also need to put the TIPIC stamp on it? But that answers the question. You answered the question. Thank you.

Okay, well, last question. In doing the TEST WITH FRIENDS, you had blue ink and black ink. Can you use either one, or does it matter for Maryland?

Elaine: It doesn't matter. But as a best practice, I always use black. The signer can use blue or black.

Notary: I've had signings where the mortgage company specified what color ink they wanted.

Elaine: We would honor the mortgage company's preference.

Notary: When do the clients get the [completed] documents, after the session? But I believe you said you can do it manually if they haven't paid.

Joey: Correct. You can set that to manual and that's a process we are working on improving. And then once they pay their invoice, you just click on release documents from the JOURNAL and it sends them the link where they can download their documents from the secure repository. Perfect. It's still a little bit of a manual process, but we're working on building out that automation so that we don't have to touch it anymore.

Notary: Perfect. Thank you so much, Joey. Thank you, Ms. Elaine, too.

Elaine: Okay. Joey, I've noticed there's a lot happening within that JOURNAL section - it plays a much bigger role than we realize. When I first heard JOURNAL, I was only thinking about recording the details of the signing itself, but there's actually a lot more activity and information flowing through that section, right?

Joey: Correct. Yes, ma'am. The JOURNAL is where a lot of key activity happens. It holds your audit log, invoicing, and the tools to add income and expenses, which then update your ledger. You can also join sessions, terminate sessions, and access both the original and signed documents.

If this were a completed session, you'd be able to track your earnings and expenses, maintain a record of your notarial acts, and export that data. You would also see the video recording and any associated receipts for the session.

There's also a chat feature that allows you to send a message to your signers in advance, which they'll see when they join the session—though it's not something I've personally needed to use. You can also clone sessions from the JOURNAL. Cloning duplicates the session setup, but it does remove ID verifications, pre-tagging, and similar items, so those would need to be redone.

Notary: When you finish a closing, do you download the video or the audio right away?

Joey: I do not. It's all stored in my journal. It's all stored here for 10 years. I've never been asked for the video upfront for a closing. Here in Virginia, that's not required. It's automatically saved in my journal itself. I don't retrieve it and save it elsewhere because it's already saved on the secure BlueNotary server. I don't want to be responsible for that data.

Notary: So, you don't back it up.

Joey: I don't, I've never had a need to. It's a lot of data to store. I've done over 16,000 RON transactions in the past five years. I personally do not back it up.

Notary: What if Blue Notary went out of business? Where's your journal?

Joey: I don't anticipate that happening. You can certainly download the sessions, again, in part or whole, if that's your personal preference. But the good thing is that it is right there, if we choose to do it.

Notary: You already have the Quick Start Guide, but I was wondering whether there are any additional guides or a cheat sheet available. I am more old-school and like having something I can refer back to—notes, a reference sheet, anything that helps me double-check that I am on track and not missing steps. I am really looking for a guide you can revisit as needed.

Joey: We do have searchable help articles. So that way you can, and I can send the link to the articles as well.

There is quite a bit of data. You would want to search for the individual topics. It does try to break it down into categories for you. But if there's something in particular you want to know how to do, like using the simulator or uploading a custom document here, this will give you text and video content for that specific topic. So, if it's easier to break it out into those tinier pieces, you can certainly use our article library. Again, I'll send you the link to that. That is also accessible through our chat support. When you click chat, you'll see an option to go to the articles. And you can search for the articles there, and it will open up in a new tab.

Notary: Is Maryland a biometric state or only KBA?

Elaine: KBA

Notary: I was assigned a Ron closing through a signing service, and they paid \$60 for it. I chose BlueNotary and BlueNotary charged \$25 for using the platform. So, at the end, I only made \$35. From what you were saying earlier, could it have possibly been more if I chose to manually invoice, or will it still have been just \$35?

Joey: OK, give me a little bit more information. So you accepted the signing from the signing service and then you invoiced them the contracted rate that you agreed to with them?

Notary: Well, or no, no, I just bought over the signing to BlueNotary and they paid me \$60 in order to do it. But using BlueNotary, you charge \$25, then at the end of the day, once all the numbers came together, I only made \$35.

Joey: Okay. You said they paid you \$60 to do it. Who are they?

Notary: They are the signing service.

Joey: Okay, exactly. So, you're contracted with a signing service and you agreed to take this signing for X number of dollars, which in this instance was \$60. BlueNotary's platform fee for real estate closing is \$25. So, the difference, of course, would be your profit.

Notary: Right.

Joey: Now, if you had contracted with a signing service and they said they were going to pay you \$125, you know, your profit would have been \$100. We can't determine the rates that these signing services are offering for RON closings.

Notary: Right. I understand that. But I think I'm getting a little confused when you say we can manually invoice. Would that have changed your price you've taken from me for bringing a client, or would it still always be 25?

Joey: BlueNotary's price will always be \$25.

Notary: Okay. Understood. Okay. Sorry about that.

Notary: This question may have already been answered, but I do thank my friend Yvette, who asked some questions that were on my list as well. We trained together and did the practice sessions. Thank you, Yvette, for asking. But I have a question, Yvette actually mentioned a RON session. It was the one that I did, the actual RON session.

And the gentleman was at work. And while we were recording this RON session, it was like he was working at a convenience store and stopping to greet customers. All of that got recorded. But he was in Alabama. Of course, I'm in Maryland. And I'm curious about the invitation. So we had set a time for 4:15p. Of course, I'm thinking my time, 4:15p. But he wasn't ready to join because in Alabama, it was 3:15p.

So when we're sending the invitation to the signer, and we're in different time zones, what do they see as far as the session? 4:15p for me, and there is an hour difference in the time zone between me and the signer, what does their invitation say?

Joey: Their invitation is going to show the time stamp.

Notary: What does that mean?

Joey: For where you are. When they receive the invitation, it's going to show, you know, it was scheduled for 4:15p Eastern time, and then, of course, if they're going to have to convert that, to their time zone. So, for example, if I'm meeting with someone in Hong Kong, it's still going to show where I'm located, which is Eastern time, and they'll have to just do the conversion.

Notary: I see. Okay. Yeah, I was just curious about that because he wasn't ready to join at 4:15p because it wasn't 4:15p his time.

Notary: We emailed each other yesterday in regards to the GNW open call program. And I still can't get to the handbook, and I went to the help desk and they told me to go to Chrome. I was still having difficulties getting it. It still would not open for me.

Joey: Give me just a second to get you pulled up here. Okay, so what you're referring to is when you're going to your MANAGE tab, you're scrolling down to GNW Open Call Program. It's opening in the new tab, correct?

Notary: Yes.

Joey: So, then when you're opening it in the new tab, let me take a look where you are in that. My demo account will show that it's all been completed because that's just how the demo account is set up. So, you're on page one, where it says review the handbook. I'm currently logged into your account. I popped it open, and it opened right up in another tab. So you said you tried Google Chrome.

Notary: Yes, on my phone and my tablet.

Joey: Have you tried it on a computer instead of a tablet or mobile device?

Notary: I'm not in town right now, so when I get back, I will try it that way.

This question is for Elaine. I went to the Secretary of State website to order a handbook, and it says they're backordered. Is there a way to get it?

Elaine: They do get backordered. They will ship as soon as they come in.

Notary: Hello, everyone. I just wanted to share that during one of my test sessions, when I was doing the sessions with myself, I didn't encounter this. But that might have been because I went through some security updates on my computer. And when I was doing the test session with a friend, when I was about to complete the session, I got a pop-up notification letting me know that the jurisdiction that my notary is commissioned was not the same jurisdiction that was coming up, but the notary signed and completed the session. And so I chatted with the help desk, and they asked, is your VPN on? And so just to let you guys know, if you do use VPN, disable it when you're doing signings.

[What is VPN - A VPN (Virtual Private Network) is a secure, encrypted connection that protects your internet activity and can make it appear as though you're browsing from a different location. It creates a private "tunnel" between your device and the internet, shielding your data from outsiders. Kaspersky]

Joey: It's actually against the law here in Virginia for you to do RON with a VPN on. So it may be the same in Maryland. Thank you, Tamara, for sharing that with the group, because we don't see that very often, but it does come up. And

a lot of folks don't understand or don't realize, you know, that the VPN is going to interfere with their ability to do RON.

Elaine: Tamara, please e-mail me what you just spoke about.

Notary: I surely will.

----- Original Message -----

From: Tamara Chapman

To: ELAINE Wright Harris <thedeskofelainewright@comcast.net>

Date: 02/24/2026 9:07 PM EST

Subject: Re: Power of Attorney

Hi Mrs. Elaine,

The comment I made in tonight's zoom call:

During one of my test sessions, I received a notification stating that I was outside the jurisdiction of my notary commission and showing my location as Ashburn, Virginia. I do not recall the exact wording because the message disappeared once I began chatting with the help desk.

The guidance from the help desk chat is below:

- *(1) Disconnect any VPN service.*
- *(2) If using a company device, verify that a background VPN is not active.*
- *(3) Restart your browser after disconnecting.*

Please let me know if you have questions,

Thanks

Tamara C.

Tamara: I noticed there were two who were having issues with, what was it, Norton? I have Norton. I haven't had that issue you guys are encountering, but I do have a MacBook. So, I don't know what that might be and why I'm not having that issue.

Notary: You had talked about this before, but I had finally gotten approved and I started getting **notifications for witnessing**. But it says that I'm disabled or it's been disabled. So, I wanted to know, do I have to go through the nine videos first before I can do witnessing?

Joey: Correct. So you do need to get onboarded for our general notary work open call program before you can start doing witnessing as well.

And so that is something that has to be completed. And that's going to be under your MANAGE tab right there under GNW Open Call. So that's going to be the training and the little quiz at the end. And then you'll be able to start picking up those sessions.

Notary: And I wanted to know, are you able to witness on your phone, like anywhere or do you need to be at your desktop or your laptop?

Joey: We do ask that you are on a desktop or laptop. Preferably, you can use an iPad, but you are disabled from being able to join the sessions from a phone. Great question.

Notary: Yeah, since we're talking about laptops, so what about the Microsoft Pro tablets like we can use for iPad? Can we also use that too for this program?

Joey: Is it a mobile app?

Notary: Well, it's Microsoft Edge. But I can put Chrome on there. It's not on there now, but it's a Microsoft tablet, pro tablet that I can use for iPad.

Joey: So, I would strongly suggest if you're trying to use that for RON, that you of course have Chrome. Chrome just works better with the app, just in general. What I have found with notaries who try to use a tablet or an iPad to do RON specifically, it can be cumbersome because of the location of the camera. So on the iPad, the camera's on the narrow side and typically you're going to be sideways. So, trying to deal with the iPad, if you don't have an external keyboard and mouse, it just, it looks clunky and it just looks messy. So we do, ask that you **please be on a desktop or laptop to do your notarizations**. It does look more presentable.

But if you're able to navigate that on that tablet, you most certainly can. The tablet version of our platform is slightly different. So you'll want to be sure to familiarize yourself with how to navigate the tools and menu options. But instead of having your tools and menu here on the right, it's actually across the top here. And so you just have to hover over them and drop them down and choose what you need from there and then they kind of disappear up into

the menu again. So it is slightly different when you're doing it on the tablet as opposed to doing it on the full screen.

Notary: What I wanted to say is when I was practicing with TEST WITH FRIENDS, I noticed my screen would freeze up, and so we would be talking, and he could see me, and then it would freeze up. Have you had anyone else who has been experiencing that feature as well, that problem?

Joey: I haven't had any feedback on that today, and I've done my own RON signings today as well, and didn't have that encounter. It could be a connection issue; it could have been, there's a number of things. If you have that happen again, reach out to our live chat support and give them the session ID so they can look into it and resolve any issues for you while they're happening. It's very hard to kind of go backwards and try to sort something like that out. And they're available even while you're in the session, right here in the lower right-hand side. Even if it's a test session, just give them the session ID and let them dive into it at that point. They can help resolve any problems so it doesn't become a recurring issue. But I'm not aware of any widespread issue, and I didn't encounter one today. Okay.

Notary: One other thing is when I was the signer, you know how you have the camera and you take a picture of yourself [TEST WITH FRIENDS]? I was taking a picture of myself, but it wasn't completing it. It wasn't following through to say, Okay, here's the person's ID now. Let's move on. So that was another issue that we encountered.

Joey: So that process will accept a picture of literally anything because it's not truly verifying your ID.

I'm assuming your camera was enabled and allowed on the site.

Notary: That's correct.

Joey: Because that's another common thing that we see is folks will not allow the camera, and then they get kind of in this loop where they can't complete the process.

Please, again, if you run into those problems, reach out to Chat in a timely manner. Give them the session ID and let them get that sorted out for you

when it's really happening, because it's very hard to kind of go backwards to identify any type of these errors.

Notary: I just want to make sure that I understand the RON process in general. As the notary, you have to be in the state of Maryland whenever you're notarizing documents, correct?

Elaine: If you have a Maryland notary commission, you are authorized to notarize anywhere in Maryland. But if you had other commissions, like Shelly, she met the criteria for both a DC commission and a Maryland commission. Shelly, please explain your commission status.

Shelly: Let me clarify. I do hold two notary commissions. One in Maryland and one in DC. Depending upon where I am, that is the commission that I use. So, you can notarize documents remotely as long as you're in Maryland. And it would be the same thing for DC, if I had IPEN approval. I would need to be in DC to use that. Does that answer the question?

Notary: So basically, what I was thinking is that as long as I'm in Maryland, I can notarize a document from wherever since my commission is in Maryland. Okay, all right, perfect. Thank you.

And then my second question. What is GNW? Well, I'm not really clear on what that is. Can you do a quick overview?

Joey: I would be happy to. So GNW stands for general notary work. So that's going to be anything other than a closing or estate planning package. Closings would also include HELOC or refi, any type of document that requires MISMO. And then an estate planning package is just what it sounds like. And that's typically going to include living wills, trust documents, those types of things. You have three categories of notary work. GNW, which is general. Those are going to be your child travel consent forms, bank forms, residency affidavits, anything that's not a real estate closing or estate planning package. [**MISMO stands for *Mortgage Industry Standards Maintenance Organization* — the group that creates the data, document, and technology standards used across the U.S. mortgage industry. It is widely described as the “language of lending.” - [Home | MISMO](#)**]

Notary: I want to make sure I understood the cost of the training, and you said that with the Pro Plan there shouldn't be any cost associated with it. Is that with the Pro Plan if you pay up front yearly or monthly?

Joey: That is with the annual pro plan. The annual pro plan. So, monthly subscriptions, you have to pay whatever the price is. You can upgrade from monthly to annual at any time. Just let me know if you want to upgrade, because I do have to make some tweaks to your account so that you get the full discount.

Notary: I've noticed the witness requests come through quickly and are gone just as fast. What steps should we take to make sure we're included so we can support some of those assignments too?

Joey: Waiting for the e-mail notifications is not the most efficient way to do the Open Call Program because it is first come, first serve. By the time the e-mail goes out, you have to receive the e-mail, log into your platform. Often, it's already going to be picked up by another notary who was there ready and waiting. So the best way to pick up those calls is to have the queue open and join directly from the queue right here in real time. Again, the emails are not the best way to get those notifications or to get those sessions because they're likely gone by the time you sign into the platform.

Are you using Google Chrome? Okay. Chrome seems, again, seems to work best, but the platform is truly designed, like I stated, to support you and your clients. The open call program can feel very competitive because it is first-come, first-served. And it depends on how many notaries are online at any given time and how many clients are coming through. Now, the more active you are on the platform in general, the more likely you are to get a higher volume of opportunities. But we want to really **empower you to build your own notary business**. Not only that, but you'll be much more profitable charging Maryland rates to your clients than you will making \$5 to \$10 a piece with our clients. I hope that answers your questions.

Notary: In a sense, it does. But if we're trying to, like I said, some of us have invested so much, and we are attempting, for me, for one, to be a part of the LSW program. And if we can't even get a few general notarizations, it can be discouraging.

Joey: Understood. And I'll be happy to share that feedback with my team. We're always working to build that side of the business to drive more foot traffic from consumers to our site and help build up that volume, in addition to supporting the notary side of things. So that is something that we're consciously, constantly working on, and we hope it will continue to improve by leaps and bounds. I will share that feedback though with my team. And, you know, I think it's kind of a common theme that we hear quite a bit. And so we're working on building up that side of the business

But truly, we are not a signing service; we are a platform. We just want to give everybody the opportunity to know about, and to do notarization through the open call program, but sometimes there's just not enough volume to go around, you know, so that is something we're continuing to work on improving, and we'll continue to do so in the future. Okay, thank you. You're so welcome. All right.

Joey: I don't see any other hands up, and it is almost 9 o'clock. I really appreciate everyone joining tonight and giving me the opportunity to review your experience with our Tests with Friends program. Ms. Elaine, thank you so much for taking the lead on that. was a huge undertaking.

Elaine: [Click here to access certificates in the .jpg format](#), the script, and other pertinent information.

Joey: All right, ladies and gentlemen, it's great to see everyone this evening. I am going to disconnect from the call. But please, again, don't hesitate to reach out. Nice to see everyone and good luck. I look forward to being on this journey with you.

Elaine: Oh, yes, we are on a journey. Thank you so much. Thank you. Thank you. Good night.