

## Checklist for remote notarizations under COVID-19 Emergency Legislation

- \_\_\_\_\_ Confirm that the planned videoconference app is accessible to all parties.
- \_\_\_\_\_ Confirm that the app being used will allow for recordings that can be stored.
- \_\_\_\_\_ Confirm that the Principal and Notary each have a full copy of the document being signed.
- \_\_\_\_\_ If you do not know the identity of any of the parties, confirm that they have a government issued ID with them. Check with your firm about recording and storing copies of IDs – some will not allow it.
- \_\_\_\_\_ Do witnesses, if necessary have separate signature pages to sign?  
If possible, provide them with a copy of the will or other document they are witnessing, but keep in mind attorney-client privilege and client wishes.
- \_\_\_\_\_ Do the parties have instructions for returning the original signature pages to the Notary? Stress importance of returning pages immediately.

### Turn on your recording device before starting the formal signing process.

- \_\_\_\_\_ Obtain the verbal consent to record the videoconferencing of all parties to the signing.

### Ask the client to scan the room with the phone, computer, or other device and have the client identify all of the parties in the room.

Names and relationships of each party in the room with the client

Name	Relationship
_____	_____
_____	_____
_____	_____

**Identify each party to the signing and where they are physically located. Have the parties each swear or affirm that he/she is physically present in Massachusetts.**

Client

\_\_\_\_\_ Personal knowledge  
\_\_\_\_\_ Government issued ID  
    Type: (ex: MA license) \_\_\_\_\_  
    Ask to see front and back  
    Ask client to send copy of ID with signed papers  
City, County where physically located \_\_\_\_\_

Witness #1

\_\_\_\_\_ Personal knowledge  
\_\_\_\_\_ Government issued ID  
    Type: (ex: MA license) \_\_\_\_\_  
    Ask to see front and back  
    Take a screenshot of front and back  
    Ask client to send copy of ID with signed papers  
City, County where physically located \_\_\_\_\_

Witness #2

\_\_\_\_\_ Personal knowledge  
\_\_\_\_\_ Government issued ID  
    Type: (ex: MA license) \_\_\_\_\_  
    Ask to see front and back  
    Take a screenshot of front and back  
    Ask client to send copy of ID with signed papers  
  
City, County where physically located \_\_\_\_\_

### **Execution of Documents**

\_\_\_\_\_ For each document, have the client tell the group how many pages are in the document and show the group the first page of the document.

\_\_\_\_\_ Read the oaths for each party

\_\_\_\_\_ Screenshot of client signing and of the executed instrument

\_\_\_\_\_ Screenshot of witness #1 signing and of the executed instrument

\_\_\_\_\_ Screenshot of witness #2 signing and of the executed instrument

\_\_\_\_\_ Have each witness fill in the city/county where they are physically located.

\_\_\_\_\_ Remind parties to return originals to Notary immediately

### **Post-Execution of Documents**

\_\_\_\_\_ Complete Affidavit

\_\_\_\_\_ Consolidate all counterparts of document upon return

\_\_\_\_\_ Store copy of ID and copy of recording for 10 years