

# How To Prepare Your Signer

## Best Practices for Preparing Signers for a Remote Closing

Signer preparation is one of the strongest predictors of a successful remote online notarization closing.

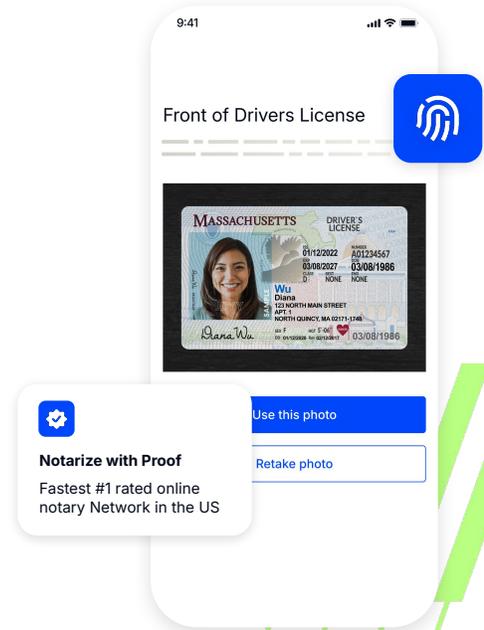
When signers understand technology requirements, identity verification steps, and what to expect during the session, closings are more likely to proceed on time and without disruption.

### Set expectations early

Introduce the [remote closing experience](#) as soon as signing logistics are confirmed.

Early communication helps signers understand that their closing will take place in a secure digital environment and allows time to prepare for identity verification and technology requirements.

Setting expectations late in the process can lead to confusion, failed verification attempts, or signing delays.



### Confirm technology readiness

Remote notarization requires signers to join a live audio-video session with a commissioned notary. Before signing, signers should have:

**01**

A device with audio and video capability

**02**

A supported web browser

**03**

A stable, high-speed internet connection

**04**

Access to a valid email address (each signer must have a unique email)

Encouraging signers to test their device in advance helps avoid day-of-closing disruptions tied to connectivity or hardware issues.

## Prepare signers for identity

**verification** is completed before the signer enters the notarization session.

Signers should be prepared to:

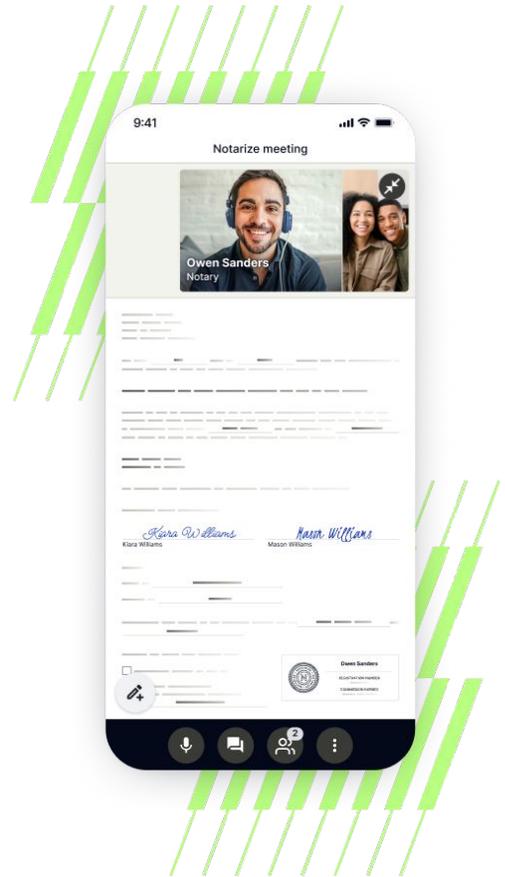
- Upload or scan a government-issued photo ID
- Complete identity-based authentication questions
- Confirm their physical location at the time of signing

Preparing signers for these steps reduces failed verification attempts and shortens session start times.

## Encourage advance document review

When documents are available for preview, encourage signers to review them ahead of the live session. Advance review allows signers to identify questions early and reduces time spent reviewing documents during the notarization.

Questions about document content should be directed to the appropriate lending or settlement contact prior to signing.



## Use an email template

Below is a sample email title agents can use to prepare signers for their upcoming remote closing.

*Subject: Your Upcoming Remote Closing – What to Expect*

*Hello [Signer Name],*

*Your closing is scheduled to take place through a secure remote online notarization session. To help your signing proceed smoothly, please review the information below ahead of your appointment.*

*What you will need:*

- *A computer, tablet, or smartphone with camera and microphone*
- *A reliable internet connection*
- *A valid government-issued photo ID (driver's license, state-issued ID card, U.S. passport, or other nationally issued passport)*
- *Access to the email address where your signing link will be delivered*

*Before your session:*

- *Test your device to ensure your camera and audio are working*
- *Be prepared to complete KBA and credential analysis*
- *Plan to join from a quiet, well-lit location*

*During your session, you will meet with a commissioned notary by live video. The notary will guide you through each document requiring notarization and witness your signatures in real time. If you have questions about your closing documents before your appointment, please contact our office directly.*

*We look forward to supporting you through your closing.*

*Best regards,*

*[Title Agency Name]*

*[Contact Information]*



# Supporting a successful signing

Preparing signers in advance reduces last-minute issues that can delay execution.

When signers understand the technology, identity verification, and live session experience, remote closings are more likely to stay on schedule and complete without rescheduling.

## About Proof

Proof connects trusted identity to high-stakes digital actions. Organizations use Proof to verify identity, authorize actions like signing and notarization, and preserve defensible records they can stand behind. Proof operates the Notarize Network, the largest on-demand network of trusted notaries available 24/7. Learn more at [proof.com](https://proof.com).