Slide 1

The Notary Journal: My BFF

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Slide 2

Takeaways

• The Journal's purpose

• Requirements for the journal

• Compliance vs Standard of Care

• Journaling the smart way

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Slide 3

Why do I need to Journal

• Evidence you fulfilled your obligations
• Accepted in Court as prima facie evidence
• Has been used to solve crimes
• It's the law in some states
• Your Protection in a civil action/lawsuit
• Integrity – Agreement as a certified NSA

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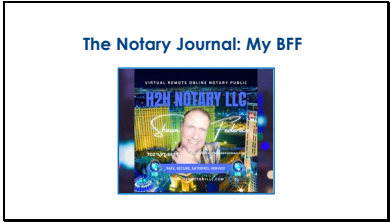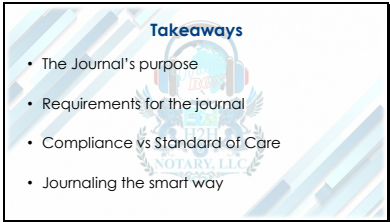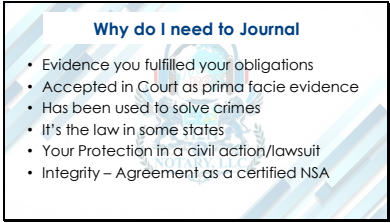**Slide 4**

American Society of Notaries Quote

- The American Society of Notaries considers journaling of every notarial act to be a primary commission responsibility.
- Consistent, thorough journaling not only provides evidence of particular acts, but also of a Notary's habitual diligence and care.

Slide 5

Required

AZ	CA	CO	DC	DE electronic
HI	KY protests	LA real property	MA	MD
ME marriages	MO	MS	MT	ND online
NV	OH protest	OK protest	OR	PA
TN act w fees	TX	VA	WA	

Slide 6

RECOMMENDED
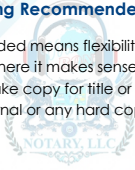
AK	AL	AR	CT	FL
GA	IA	ID	IL	IN
KS	MI	MN	NC	NE
NH	NM	RI	SC	SD
UT	VT	WI	WV	WY

NEW YORK NOT SPECIFIED
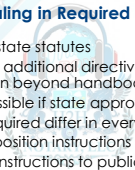
Slide 7

Journaling Recommended States

- Recommended means flexibility
- Short cuts where it makes sense
- Ability to make copy for title or public
- Use of e-journal or any hard copy style

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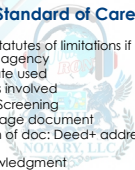_____

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Slide 8

Journaling in Required States

- Must follow state statutes
- Look for any additional directives/ interpretation beyond handbook
- E-journal possible if state approves
- Elements required differ in every state
- Specific Disposition instructions
- Photocopy instructions to public

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Slide 9

Standard of Care

- Destroy after statutes of limitations if not required to return to state agency
- Loose certificate used
- Witness names involved
- Observations/Screening
- Foreign Language document
- Full description of doc: Deed+ address of property, Type of deed
- Verbal acknowledgment

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Slide 10

Journal Example from CA SOS Newsletter

Typical Required columns: Date & Time, (MD, MO, NV, TX) Type of Notarization, Document Name (TX date), Name & Address,(except CA) WA: Atty not required it keeps other documentation

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Slide 11

Journal Sample from CA SOS Newsletter

Typical Required columns: ID description, (no numbers MT, OR, TX) Fee (except WA, HI, MA) & Signer Signature (not required OR, NV, TX) Thumbprint=req, CA-POA&R.E. (Other states optional to collect except TX)

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Slide 12

Work Smarter

- Why do we need to be more efficient at a signing?
  - Fit more assignments in the work day
  - Spend less time on a lower paying job
  - Build buffer time for calls, drops, breaks in-between
  - Minimize pain from carpel tunnel, arthritis
  - Balance efficiency and effectiveness

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Slide 13

Work smart

- 4 areas to streamline Journaling
  - Prepare before you go
  - Include journaling as you present
  - Use wording/date stamps ie: acknowledgment
  - Journal entry short cuts where allowed

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Slide 14

Work Smarter

- 2 methods to save time:
  - Proactive management
    - Conversation with signers
    - Prep of package/notary instructions
  - Table set up: use both sets of documents
    - Instructions to signers
  - Documentation shortcuts
    - Certificate/journal Stamps
    - Utilizing out of state certificates- when allowed
    - Utilizing other journal shortcuts allowed by law

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Slide 15

Work Smarter

- Journal Entries
  - For states that do not require journal take short cuts for multiple documents/signers repetitive information
  - Use Abbreviations like ACK, other common ones
  - For states where journal required, take shortcuts where allowed for repetitive information
  - Use stamps for date, notarial act, ID column, common document ie: Deed of Trust

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Slide 16

Remember

- NSA's who are certified agreed to keep a journal even if state does not require it.

- Journals in states where required may be audited by SOS for compliance, in response to a complaint, or in cases of fraud.

- Journal is evidence of your fulfilling your notarial obligations- Best Protection

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Slide 17

Resources

- Notary Public Handbook by state

- CA SOS Newsletters

- NNA Law Primer by state

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Slide 18

Contact Me

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