



ORC GUIDE SERIES

NORTH CAROLINA NOTARY KNOWLEDGE COLLECTION

North Carolina Notarization Readiness Checklist

A practical companion to ORC-NOT-001

ORC PROMISE

This resource helps you prepare for a notarization. It does not select a notarial act, explain a document's legal effect, advise whether you should sign, or replace legal advice.

PUBLICATION ID	ORC-NOT-001-CHECKLIST
VERSION	1.0
PUBLICATION DATE	August 12, 2026
STATUS	Review copy - owner approval required

PREPARE THE DOCUMENT. CONFIRM THE ACT. PROTECT THE SIGNER.

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A. Appointment and Method

Confirm the pathway before traveling, signing, transmitting, or paying. This checklist does not establish that a document is eligible for a particular method.

☐	I confirmed the appointment date, time, location, and contact person.
☐	I confirmed whether the act is traditional paper, in-person electronic, remote electronic, or another authorized process.
☐	I confirmed that the document is eligible for the identified method.
☐	I confirmed whether original paper, electronic files, a platform account, or same-day transmission is required.
☐	I confirmed whether any witnesses must attend and whether they must be physically present.

ORC DEFAULT

Prepare for an in-person appointment unless ORC expressly confirms another authorized method in writing.

Appointment notes

B. Document and Notarial Act

☐	I have the complete document, including all pages, attachments, and exhibits.
☐	The document's issuer, recipient, or my attorney identified the required notarial act.
☐	The record contains or is accompanied by appropriate certificate wording, or I have instructions from the issuer or recipient.
☐	I have not asked the notary to select the act or explain the document's legal effect.
☐	I will wait for signing instructions unless the issuer has clearly directed otherwise.
☐	I have confirmed whether separate witnesses are required and who may serve.
☐	I know where and how the completed document must be delivered.

Document title / description

Required act identified by issuer / recipient / attorney

☐	Acknowledgment
☐	Oath or affirmation / jurat
☐	Verification or proof
☐	Other authorized act or instruction attached

C. Identity and Signer Readiness

☐	My identification is current and issued by a federal, state, or recognized tribal government agency.
☐	The identification includes my photograph and either my signature or a physical description.
☐	The name on the identification can be reconciled with the document name.
☐	If using a credible witness, the arrangement was discussed with the notary in advance.
☐	I will communicate directly with the notary and answer the notary's questions.
☐	I understand the general nature and consequences of the transaction.
☐	I am participating willingly and without coercion, duress, or undue influence.

BRING THE ORIGINAL ID

A photocopy, photograph, expired card, or damaged credential may not satisfy the requirement. The notary makes the acceptance decision after examining the credential and circumstances.

Name or identification issue to resolve

D. Fees, Travel, and Delivery

☐	I received or reviewed the disclosed notarial fee.
☐	I confirmed the number of principal signatures to be notarized.
☐	If travel is requested, I agreed in writing to the mileage reimbursement before travel.
☐	I confirmed the payment method and any cancellation or waiting-time terms.
☐	I confirmed whether any separate administrative service charge applies.
☐	I confirmed how the completed record will be returned or delivered.

Appointment cost and logistics

Notarial fee	_____
Mileage agreement	_____
Other disclosed service	_____
Payment method	_____
Return / delivery method	_____

E. Stop-and-Refer Check

Pause the appointment and obtain instructions or advice if any item below applies.

☐	I do not know which notarial act or certificate is required.
☐	The document is missing pages, attachments, certificate wording, or required witnesses.
☐	My name or identity information does not match and the issuer has not provided instructions.
☐	I need someone to explain the document, advise whether I should sign, or change legal content.
☐	I have concerns about capacity, coercion, fraud, authority, ownership, or legal effect.
☐	The requested electronic, remote, or video method has not been confirmed as legally available for this document.

WHO TO CONTACT

Contact the document issuer or recipient for administrative requirements. Contact a licensed attorney for legal interpretation, drafting, capacity, rights, or advice about whether to sign.

Follow-up record

Question: _____

Person / organization contacted: _____

Date: _____

Instruction received: _____

Next action: _____

F. Final Appointment Check

☐	Appointment method confirmed
☐	Complete document and attachments ready
☐	Required notarial act identified by the proper source
☐	Current qualifying identification ready
☐	Witness requirements confirmed
☐	Signer willing, aware, and able to communicate directly
☐	Fees and mileage disclosed and agreed
☐	Delivery instructions confirmed

IMPORTANT

Completing this checklist does not guarantee that the notary can perform the act. The notary must independently verify all legal requirements at the appointment.

Publication Control

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Companion guide: Before Your North Carolina Notarization

Status: Review copy - owner approval required