

Oracle
**Textura Payment Management
Subcontractor Notary Guide**

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Oracle Textura Payment Management Subcontractor Notary Guide

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Electronic Notarization on TPM

Notarization Overview

Oracle Textura Payment Management (TPM) supports electronic notarization for invoices, lien waivers, and sworn statements. Notaries witness the signing of documents and verify the identity of the person signing a document.

When a document on TPM requires notarization, your Billing Workflow displays notary fields before you can apply your signature. Electronic notarization requires the Notary to use the Signer's computer to verify the Signer's signature. When prompted, Notaries enter their username and password, watch the Signer sign the document, and then add their own signature to the electronic document. Notaries in some states will also apply a notary seal when signing.

The system will apply the signature and other state specific requirements to the document.

Set up notary permissions on the Notary's user profile.

Keep in mind:

- ▶ TPM does not currently support notarization in: North Carolina, Puerto Rico, Territory of American Samoa, Federated States of Micronesia, The United States of Territory of Guam, Republic of Marshall Islands, Commonwealth of the Northern Mariana Islands, Commonwealth of Puerto Rico, Republic of Palau.
- ▶ To notarize documents, a user must have the **Notarize Documents** permission. The user profile must also include all required notary information.
- ▶ Any Notary on the system can notarize a document.
- ▶ A user cannot act as both Signer and Notary for a document because you cannot notarize your own signature. You need a Notary user to witness the Signer's signature.
- ▶ A Notary's signature must be applied shortly after a Signer signs the document.
- ▶ Colorado notaries are required to enter their Document Authentication Numbers (DANs).
- ▶ Florida notaries authenticate in order for the system to prepare the correct language to appear on the document for signing and notarization.

View our video guide on creating a notary profile and notarizing documents

https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6309888259112

By-Passing Electronic Notarization

In some instances, electronic notarization might not be possible because of local laws and regulations but a document will still require a notarized signature. When this happens, your General Contractor may enable the **Bypass Electronic Notary** workflow on a project. This workflow allows you to download a document to bring to a notary public for traditional notarization and then scan and upload the document back into Textura.

Note: The availability of the Bypass Electronic Notary workflow is used at a General Contractor's discretion. Not all documents or projects will benefit from this feature.

See ***Bypassing Electronic Notarization When Signing a Document.***

FAQs

Why can't I attach my notary seal? (see page 9)

Do I need to have a notary in my organization? (see page 9)

Setting Up Notary Credentials for a User

After selecting the **Notarize Documents** user permission on the **Edit User** page, a notary public can enter their credentials. State laws and rules in your jurisdiction determine how much information you need to include to become an on-system notary.

To enter their credentials, a notary public will:

- 1) Navigate to the **Edit User** page.
- 2) From the **Notary Information** section of the **Edit User** page, select the **Manage Notary** button.
A **Notary Information** pane opens on the right side of the page.
- 3) From the **Notary Information** pane, complete all required fields.
- 4) Optional. If required, add a notary seal.
Notary seals must be in a PNG format and no larger than 4MB.

Note: See ***Electronic Notarization on TPM*** (on page 3) for more information on how these requirements may vary between jurisdictions.

- 5) Select the **Save** button.

Notarizing a Document

As a notary public with an account on TPM, you will witness the Signer applying their signature to a document and then you will electronically notarize that signature from the same computer.

Note: Your notary signing process may differ slightly between projects. Project settings, invoice documents, conditional and unconditional lien waivers, and sworn statements chosen for the project affect how both

documents are signed and how you will notarize those signatures.

Complete the following steps to notarize a document from **Your Billing Workflow**:

- 1) Select the **Review & Sign** tab.
- 2) From the **Sign Billing Documents** or **Sign Lien Waivers** card, enter your username and password for your notary account.
- 3) Select the **Login Notary** button.
If your Notary login has been verified, the **Notarize** button is activated.
- 4) The Signer signs the documents by selecting the **Sign Billing Documents** or **Sign Lien Waiver** button.
- 5) Select the **Notarize Documents** button.

Notaries commissioned by the state of Colorado need to include DAN information when notarizing projects. See ***Notarizing Documents with a Document Authentication Number*** for more details.

All documents requiring notarization open up in a DocuSign portal. Instructions appear at the top of the page.

- 6) From the top of the DocuSign page, select the **Continue** button.
- 7) Optional. Select **Start** to help guide you through the signing process. Each time you apply your signature, a blue tab helps direct you towards the next step.
- 8) Select the highlighted area in the document to apply your signature.
If your state requires a Notary Seal, select the highlighted area in the document to apply your seal.
- 9) Continue through all of your documents, applying your signature to all highlighted fields.
- 10) After you apply your signature to all of the highlighted areas, select the **Finish** button at the top of the page.
When the signing user submits the invoice, the draw moves to the **Pending Payment** section on their **Project Home** page.

Notarizing Documents with a Document Authentication Number

A Notary Public in the state of Colorado must enter a unique Document Authentication Number (DAN) when notarizing a document on the system. The DAN acts as the legal equivalent of a notary seal used in paper notarization.

When the Notary is commissioned by the state of Colorado, the application initiates notarization with the DAN functionality.

Note: To include a DAN, the General Contractor must select a document that supports the DAN functionality.

- 1) The Signer selects the **Sign Document** link from the **Project Home**, **Draw Home**, or **Tasks** page.
The **Sign Document** page displays. It includes a **Confirm Notary** dialog box.
- 2) In the dialog box, enter your username and password, and then select **Authenticate**.

An **Enter Document Authentication Numbers** dialog box displays.

- 3) In the dialog box, enter the last four numbers of your DAN and select **Submit**.

Notes:

- Selecting **Cancel** instead of **Submit** causes the system to return to the **Project Home** Page.
 - If multiple documents require notarization, you may need to enter multiple DANs. DANs are unique to each document.
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- 4) The Signer selects the **Sign Invoice** button on the **Sign Document** page and signs the document in DocuSign.

The system returns to the **Sign Document** page and includes Notary fields.

- 5) Select the **Notarize** button.

A PDF version of the document displays.

- 6) Select the highlighted area in your document.

The Notary signature and DAN displays on the document.

- 7) From the top of the PDF, select **Finish** to submit the document.

After the document is notarized and the application has been sent, the draw moves to the **Pending Payment** section on your **Project Home** page.

Bypassing Electronic Notarization When Signing a Document

If a General Contractor enables the electronic notarization bypass workflow, you can skip the electronic notarization step when signing a document which needs notarization on TPM. Instead, you will scan and upload an image of your document signed and notarized in the traditional pen and paper way after you complete your signing process.

To bypass electronic notarization while signing a document:

- 1) Navigate to Your Billing Workflow for Subcontractors.

- 2) From the **Review** tab, select the **Sign Billing Documents** button.

If the document requires notarization, there will be a section for your electronic notary to add their sign in credentials. When a project allows the electronic notarization bypass workflow, you will see a message displayed at the bottom of the notary login card explaining the process.

- 3) Select the **I would like to bypass electronic notarization** link.

A **Bypass Electronic Notarization** dialog box displays.

- 4) In the dialog box, select **Ok**.

- ▶ You will see a message explaining why a hold may be placed.
- ▶ The dialog box closes.
- ▶ The page refreshes. It no longer includes a Notary login section.
- ▶ You will need to follow these steps for each document which requires notarization.
- ▶ Since you bypassed the electronic notarization step, you will need to upload your notarized document.

- 5) Continue your signing process.

See Signing Documents for Subcontractors for how to electronically sign documents on TPM.

View a video guide on how to bypass electronic notarization View a video guide on how to bypass electronic notarization.

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Frequently Asked Questions

Do I need to have a notary in my organization?

As long as a notary can physically join you at your computer and has an account on TPM, they can notarize your document. The notary does not need to be a part of your organization. If your notary does not yet have an account on TPM, you can *invite them*
https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10303341.htm.

Note: Selecting the above link will open the help page in a new browser tab.

Why can't I attach my notary seal?

Your image might not fit all requirements. To upload a notary seal, your image must be a:

- ▶ PNG file type
- ▶ Maximum of 4MB in size.

After uploading an image, it will default to a size of 270px by 105px.