CA NOTARY ACADEMY

Lesson plan & 2027 change map

Six-hour California notary course | Full schedule, amendment crosswalk and submission controls

Lesson plan revision 2 | November 2, 2026

CA-6HR-2027-REVIEW-1

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DRAFT - NOT SOS APPROVED

Proposed six-hour course | Initial application in preparation. No approval has been granted. Section 7 identifies procedures that remain incomplete.

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CA Notary Academy | Curriculum CA-6HR-2027-REVIEW-1 | Lesson plan revision 2 | November 2, 2026

1. Course purpose and application scope

CA Notary Academy proposes a six-hour asynchronous course on California notarial functions and duties. This is an initial application in preparation; no course approval has been granted. Owner and proposed certificate signatory: Rakesh Ranjan. Contact: canotaryacademy@gmail.com.

The course contains 20 modules and 170 module questions. Learners identify the actor, requested act, governing duty, required personal appearance and lawful action before selecting a fee or consequence. The companion complete-course workbook contains the lessons, written activities, scenarios, questions, choices, answer keys, explanations and source notes. Answers are printed for agency review; proposed learner delivery reveals them after an attempt.

The application covers the six-hour course only. A three-hour refresher and the separate online-notarization course are outside its scope. The course will not be offered as approved education, and proof of completion will not be issued, before the required course approval and completion controls are in place.

2. Legal basis and effective dates

Instruction uses the 2026 California Notary Public Handbook as its baseline, incorporating the chaptered amendments in AB 1597 (Chapter 39), AB 1828 (Chapter 275) and AB 1977 (Chapter 280), Statutes of 2026. The statute-to-lesson crosswalk identifies the placement, objective and assessment for each requested amendment. Sources are listed at the end of this plan.

The edition applies the January 1, 2027 fee and electronic-signature/seal amendments. AB 1828 sections 7-8 retain the existing oath-and-bond recording process during 2027 and make the replacement process operative January 1, 2028. Both versions retain the 30-day activation requirement. Future procedures are identified by their operative date.

Electronic-signature and seal provisions do not alone activate California remote online notarization. The California online-notarization framework has separate implementation, rules, registration and training requirements. Section 8231.18 addresses covered remote services involving an officer located outside California.

The lesson-plan structure has been checked against the SOS current-regulations webpage on November 2, 2026, particularly sections 20800 and 20800.1. That structural check is distinct from a full legal-content audit or course approval.

3. Instruction, participation and schedule

For each section, learners read the rule, attempt the stated exercise or guided exercise, write a reasoned response, and compare their reasoning with the model answer or checkpoints. Module scenarios ask learners to identify whose conduct is at issue, who must appear, which act is requested and what should happen next. Proposed instructional review directs inadequate responses back to the relevant rule for correction. The designated reviewer, response time and escalation procedure are not yet finalized.

The proposed allocation is 360 instructional minutes. The major-subject and detailed section schedules identify the lessons and activities. Reading and written exercises currently share each section allocation; module quiz allocations include completion, correction and discussion through written explanations. The final schedule still

needs explicit allocations for each participation activity, module scenario and test phase, consistent with section 20800.1(f). These must fit within the six-hour total rather than create additional uncounted requirements.

Lunch and breaks have zero instructional credit and no scheduled instructional allocation. Inactivity, payment and identity setup receive no instructional credit. The permitted handling of interruptions in asynchronous attendance remains subject to the attendance procedure described below. No audio/video presentations, separate visual aids or student evaluation survey are proposed. If an evaluation is later included, its form must accompany the plan and its completion must not exceed ten minutes of class time under section 20800.1(i). Optional exam-preparation activities are outside this course and its six-hour allocation.

4. Assessment and correction

The proposed course uses the 170 module questions included in the complete workbook. Each has four choices and one keyed answer. The proposed module passing threshold is all questions answered and at least 75 percent correct. This is the vendor's instructional standard, not the state examination passing standard. No separate final examination is included in this proposed lesson plan.

After an attempt, the learner receives the correct answer, an explanation and its source. Missed items direct the learner to review the relevant instruction before another attempt. Questions and written exercises address personal appearance, acknowledgment versus jurat, the actor responsible for misconduct, fee calculations and the dated filing transition. These are original instructional questions, not reproductions of the state examination.

5. Identity, attendance and confidential proof of completion

Identity procedure - unresolved: the procedure must establish that the person attending is the person named on the certificate. Verified email and self-entered identity details alone do not establish that fact. Before this plan is finalized, the vendor must specify the accepted photo-identification evidence, inspection method, linkage to the attendee, responsible reviewer, correction/rejection process and protection of the information. Identity collection and certificate issuance remain disabled while that procedure is incomplete.

Proposed attendance controls record elapsed active course time, restrict simultaneous credit from multiple sessions, stop credit during inactivity and require periodic responses to instructional checkpoints. The proposed design requests a time update every 15 seconds and requires a correctly answered checkpoint within 120 seconds to continue credit. These technical signals do not by themselves establish the attendee's identity or attention.

Section 20800.5(b) prohibits issuance when a person fails to be present during any portion of the approved course and denies credit for the time in which that person was present. This plan does not treat simply pausing a timer and retaining prior credit as an established compliant procedure. The treatment of asynchronous interruptions, restart requirements and permitted breaks must be settled before final submission and delivery.

Under the proposed issuance procedure, an authorized reviewer checks the approved course/version, required attendance, completed participation and assessments, and verified identity before authorizing proof of completion. Rakesh Ranjan is the proposed authorized signer as Owner, CA Notary Academy. The certificate must contain the approved vendor name; learner name; photo-ID type, number, expiration date and issuing state or country; course completion date; six-hour course designation; and statements that proof is valid for two years from issuance and must be attached to the notary public application when submitted to SOS. These fields and the authorized

signature follow section 20800.5(c).

Certificate confidentiality follows section 20800.1(d): information is restricted to the issuing vendor, its authorized employees/agents/instructors/contractors/subcontractors, and the named learner. The intended delivery is a private PDF to the learner's verified registered email, with no public certificate page. Recipient validation, access restrictions, attachment protection, misdelivery handling and the signature process must be finalized and tested; the email channel alone is not proof of compliance.

6. Attendee records and vendor administration

Proposed attendee records follow section 20800.6. The vendor must maintain a secure session list for two years from issuance of proof for the session. It must include the approved vendor name and vendor identification number; instructor names; course date, time and location; attendees alphabetically by surname and whether proof was issued to each; and the required photo-ID type, number, expiration and issuer. Social Security numbers must not be collected. The session/instructor/date/time/location representation for asynchronous delivery remains to be finalized.

The attendee list and its information must not be copied or released except to the Secretary of State, district attorney, city attorney or Attorney General as specified in section 20800.6(c). This restriction is distinct from delivering a learner's own certificate. Access and retention procedures must implement these requirements.

The proposed vendor administration procedure permits authorized SOS representatives to attend without prior notice and without charge under section 20800.7, upon presentation of the prescribed identification letter. Written SOS requests concerning the course must receive a written response within 30 business days under section 20800.8. Approved-vendor application information changes require NP40 notification within 30 business days and confirmation of receipt under section 20800.3. Revisions to an approved lesson plan require approval before implementation under section 20800.4.

The refund policy must be disclosed before fees are charged. For scheduled courses, section 20800.9 requires refunding all fees within 30 business days of the scheduled course date if an instructor fails to appear, or if the start is delayed more than 15 minutes and the attendee immediately requests a refund and leaves before the course starts. These regulatory conditions must be reflected in any applicable scheduled offering; the asynchronous cancellation/refund policy must also be disclosed before payment.

7. Review status and accompanying materials

This revision is a proposed lesson plan for preparation of an initial application. The complete-course workbook accompanies it under section 20800.1(h); both documents include contents and consecutive page numbers. The final submission will also include the completed and signed NP40 and applicable finalized procedures and samples.

The remaining substantive items are the identity-inspection procedure, asynchronous attendance/absence treatment, protected certificate delivery, designated instructional reviewer, asynchronous attendee-record format, and detailed activity/test timing. They have not been treated as resolved by editing the wording. The package remains a preparation draft until those items are completed. Internal development notes and the mailing checklist are maintained separately from this instructional plan.

8. Statutory amendment crosswalk

GC 8211 | AB 1597 sec. 2

Timing: January 1, 2027

Acknowledgment/proof $20 per signature; oath plus jurat $20 per person; POA copy certification $20; deposition $35 plus $12 oath plus $12 certificate. Voting and covered veteran-benefit no-fee rules remain.

Placement: II-C sections 1, 3-4 and quiz; II-B8 section 2 / Q3; II-B6 section 1; II-B7 section 3 distinction

Objective: Calculate by the lawful unit and distinguish included components, exemptions and unrelated fees.

Assessment: II-C-2027-Q1, Q2, Q7 and written invoice audit; II-B8-2027-Q3

GC 8213 | AB 1828 secs. 7-8

Timing: Existing recording process in 2027; replacement operative January 1, 2028

Retain the 30-day activation deadline. Teach the staged switch from recorder delivery/recording to clerk retention, filing fee under GC 54985 and certified bond copy. Distinguish oath retention from expiration and bond retention from filing.

Placement: I-B section 2 and final module question

Objective: Select the filing process by operative date and identify the unchanged activation deadline.

Assessment: I-B-2027-Q5; activation and filing timeline exercise

GC 8201 | AB 1977 sec. 1

Timing: January 1, 2027

Reappointment refresher provision expressly includes satisfactory completion of the written exam; retain residency/age/six-hour/initial exam qualifications and exceptions in baseline.

Placement: I-A section 2 and final module question

Objective: Distinguish education eligibility from the separate examination requirement.

Assessment: I-A-2027-Q10; status/date education exercise

GC 8201.2 | AB 1977 sec. 2

Timing: January 1, 2027; online course relates to separate staged framework

SOS course review includes the separate two-hour online-notarization course under GC 8231.3. No online-course approval is sought by this six-hour candidate.

Placement: I-A section 2; plan sections 1-2 and 6

Objective: Explain why approval for a six-hour course does not itself confer online-notarization training approval or authority.

Assessment: I-A-2027-Q10 explanation and section 2 discussion; II-B1-2027-Q8

GC 8205 | AB 1977 sec. 3

Timing: January 1, 2027

Specified certificates/acts may use notary's own handwriting or compliant electronic signature; oath-matching signature image, protected storage, secure multifactor authentication and no other-person access/use. Existing response duties preserved.

Placement: II-B1 section 7; II-B2 section 2; II-B3 section 1; II-B6 section 1

Objective: Apply electronic-signature controls while retaining appearance, identity, acknowledgment and jurat requirements.

Assessment: II-B2 final 2027 question; II-B1-2027-Q8; existing acknowledgment/jurat scenarios

GC 8207 | AB 1977 sec. 4

Timing: January 1, 2027

Separate tangible-seal physical security from electronic-seal encryption, exclusive control, protected storage and multifactor access. Retain ownership, size/border and required information; amended text expressly identifies electronic manufacturer/vendor sequential ID.

Placement: II-A section 4 and final question

Objective: Reject employer/coworker access and select security controls appropriate to the seal medium.

Assessment: II-A final 2027 question; III-C final 2027 question

GC 8207.2 | AB 1977 sec. 5

Timing: January 1, 2027

SOS authorization to purchase a stamp or electronic seal; authorized manufacturer/vendor permit with sequential ID and $100 processing fee.

Placement: II-A section 4 and penultimate question

Objective: Distinguish authorized procurement and vendor-permit charges from a signer's act fee.

Assessment: II-A penultimate 2027 question

GC 8214.1 | AB 1977 sec. 6

Timing: January 1, 2027 amendments; online-related duties depend on applicability and staged operation

Updated journal/security and loss-reporting references, specified acts, online-journal/recording duties and noncompliant platform/depository grounds. No blanket new felony classification or universal fine is inferred.

Placement: III-C section 1 and final question; III-D to III-G retained for separate penalties

Objective: Identify actor, duty and disciplinary ground before analyzing a separate civil or criminal provision.

Assessment: III-C final 2027 question and conduct/duty analysis

GC 8231.18 | AB 1977 sec. 22

Timing: January 1, 2027 amendments; distinct from California RON launch

Define covered business, principal, out-of-state officer/remote act, communications, recording, journal, encryption, record, open format and state; explain platform record/access responsibilities and limits of this provision.

Placement: II-B1 section 6 and Q8

Objective: Distinguish out-of-state remote services and platform duties from California notary authority and in-person electronic acts.

Assessment: II-B1-2027-Q8; electronic-versus-remote case discussion

9. Major-subject schedule

All 360 minutes are instructional allocations. Section rows in the next part expand, rather than add to, these totals. Quiz time includes completion, correction and explanation.

Module / topic	Lessons and activities	Quiz / correction	Total
I-A Eligibility for Appointment	12	8	20
I-B Commission	5	5	10
I-C Managing a Commission	12	8	20
II-A Tools to Function as a Notary Public	25	8	33
II-B1 Types of Notary Public Acts and How to Perform the Acts | Essential Basics	46	8	54
II-B2 Types of Notary Public Acts and How to Perform the Acts | Acknowledgments	14	8	22
II-B3 Types of Notary Public Acts and How to Perform the Acts | Jurats	13	8	21
II-B4 Types of Notary Public Acts and How to Perform the Acts | Proof of Execution by a Subscribing Witness	12	8	20
II-B5 Types of Notary Public Acts and How to Perform the Acts | Signature by Mark	5	5	10
II-B6 Types of Notary Public Acts and How to Perform the Acts | Certifying Copies	5	5	10
II-B7 Types of Notary Public Acts and How to Perform the Acts | Immigration Documents	7	6	13
II-B8 Types of Notary Public Acts and How to Perform the Acts | Protests, Depositions and Confidential Marriages	7	6	13
II-C Fees	11	8	19
III-A Conflict of Interest	5	5	10
III-B Giving Legal Advice/Practicing Law	5	5	10
III-C Reasons for Commission Revocation or Suspension, or Application Denial	14	8	22
III-D Civil Penalties	11	8	19
III-E Felonies or Possible Felonies	7	6	13
III-F Misdemeanors or Possible Misdemeanors	5	6	11
III-G Infractions by Notaries Public	5	5	10
TOTAL	226	134	360

10. Detailed section and activity schedule

I-A Eligibility for Appointment

Learning outcome: In 20 minutes, work through eligibility, education timing, application disclosures, and background review, then apply the rules in ten questions. Allow 12 minutes for the lesson and guided exercises and 8 minutes for the quiz and explanations.

1. Separate personal eligibility from completed process steps | 2 minutes

Guided exercise in the section body; written response followed by checkpoint review.

2. Choose education using status and dates | 2 minutes

Guided exercise in the section body; written response followed by checkpoint review.

3. Read the two clocks on education proof | 2 minutes

Guided exercise in the section body; written response followed by checkpoint review.

4. Complete disclosures instead of predicting the outcome | 2 minutes

Guided exercise in the section body; written response followed by checkpoint review.

5. Understand what background review establishes | 2 minutes

Guided exercise in the section body; written response followed by checkpoint review.

6. Assemble a plan that survives a delay | 2 minutes

Guided exercise in the section body; written response followed by checkpoint review.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 8 minutes. Parent total: 20 minutes.

I-B Commission

Learning outcome: Use the commission dates, county filing requirements, and geographic limits to decide whether a proposed appointment may proceed. Allow 5 minutes for instruction and 5 minutes for five questions and feedback.

1. Read the commission, then verify activation | 2 minutes

Guided exercise in the section body; written response followed by checkpoint review.

2. Distinguish filing county, location, and protection | 2 minutes

Guided exercise in the section body; written response followed by checkpoint review.

3. Plan for a missed deadline or a gap | 1 minutes

Guided exercise in the section body; written response followed by checkpoint review.

Module scenario discussion occurs within the lesson allocations. 5 quiz items and correction: 5 minutes. Parent total: 10 minutes.

I-C Managing a Commission

Learning outcome: Build a response plan for address and name changes, official requests, employer pressure, and the end of service. Allow 12 minutes for instruction and case work and 8 minutes for ten questions and feedback.

1. Turn changes into dated tasks | 2 minutes

Guided exercise in the section body; written response followed by checkpoint review.

2. Moving the business across county lines | 2 minutes

Guided exercise in the section body; written response followed by checkpoint review.

3. Changing the commissioned name in the right order | 3 minutes

Guided exercise in the section body; written response followed by checkpoint review.

4. Respond to the state with the records requested | 2 minutes

Guided exercise in the section body; written response followed by checkpoint review.

5. Separate workplace agreements from official control | 2 minutes

Guided exercise in the section body; written response followed by checkpoint review.

6. End service deliberately | 1 minutes

Guided exercise in the section body; written response followed by checkpoint review.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 8 minutes. Parent total: 20 minutes.

II-A Tools to Function as a Notary Public

Learning outcome: Build and audit a complete journal entry, protect your seal, and respond correctly to records requests. 25 minutes of reading and case work, followed by an 8-minute quiz.

1. Set up a secure working kit | 3 minutes

Spend two minutes sketching an office-to-mobile storage plan. You share a desk, coworkers have keys to its drawers, and you work at two locations. Identify who can access each tool and how you will keep a single sequence.

2. Build the journal from the facts of the act | 5 minutes

Use three minutes to draft a mock entry with invented data: October 8, 10:15 a.m.; acknowledgment of a deed of trust; signer Mia Chen; California DMV license; $15 fee. List each field and flag the information the scenario has not supplied. Do not invent a real ID number or claim a signature was collected.

3. Collect required prints and handle physical limitations | 4 minutes

Sort four cases and explain each: a power of attorney with an available right thumb; a deed of trust with a bandaged right thumb and usable left thumb; physical absence of usable fingers; a grant deed signer who simply declines a print. Spend two minutes before revealing.

4. Inspect the seal before releasing the certificate | 4 minutes

Inspect a sample seal or list its required fields from memory, then compare with the lesson. Explain why these proposed uses fail: stamping a character reference, lending the stamp to a licensed coworker, and stamping blank certificates for tomorrow. Allow two minutes.

5. Respond to journal requests and loss | 4 minutes

Use two minutes to build a response chart for (a) a complete public request, (b) a missing journal, and (c) a lawful seizure. Identify trigger, time period, recipient, and evidence to retain.

6. Audit a full appointment record | 5 minutes

Spend four minutes writing an audit note: a deed acknowledgment entry lists only 'closing,' today's date, a driver's license number, and a $50 amount combining travel and service. The signer has not signed the journal; no print appears. Identify at least six corrections or inquiries and the point at which you would pause the appointment.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 8 minutes. Parent total: 33 minutes.

II-B1 Types of Notary Public Acts and How to Perform the Acts | Essential Basics

Learning outcome: Practice identity evaluation, credible-witness screening, direct communication, certificate review, and stop decisions. 46 minutes of instruction and written simulations, then an 8-minute quiz.

1. Triage the request before touching the seal | 5 minutes

Use three minutes to write an intake script for a courier carrying a signed deed with no certificate. Ask three factual questions, identify what is missing, and explain a next step without selecting an act or promising that a witness can solve the problem.

2. Screen identification by category and condition | 6 minutes

Spend four minutes making a decision table: a current private-company photo badge; an expired California license issued three years ago with matching information; an expired California license issued seven years ago; a current military ID lacking a signature. For each, identify whether the stated facts satisfy the method and what else must still be checked.

3. Evaluate doubt rather than averaging the evidence | 5 minutes

Use three minutes to draft two responses: (1) a long-time neighbor offers no authorized ID; (2) a stranger presents an apparently permitted card whose photograph plainly conflicts with the person present. Avoid accusing either of a crime. State what would be needed to revisit the request.

4. Use one credible witness only when all conditions fit | 6 minutes

Spend four minutes creating a six-point witness interview. Then apply it: your longtime coworker knows a signer who has no authorized ID and faces genuine difficulty obtaining one, but the coworker is named as a beneficiary in the instrument. Identify the decisive issue and write the

explanation you would give.

5. Distinguish two credible witnesses from one | 5 minutes

Use three minutes to compare two cases. In A, both witnesses personally know the signer and satisfy all other conditions, but neither knows you. In B, one witness knows the signer and the other met the signer today. For each, identify whether the method is available and whose journal signatures and ID details are needed.

6. Inspect completeness and communicate directly | 5 minutes

Spend three minutes identifying the separate barriers in this appointment: the signer appears by video, a relative offers to translate every response, and the instrument's payment amount is blank. Write a response that explains each barrier without filling the amount or selecting a different legal act.

7. Reconcile certificate, journal, and actual events | 6 minutes

Spend four minutes auditing this mock file: signer Elena appeared in Orange County on October 10; the document is dated October 7; the acknowledgment says Los Angeles County, October 7, and names Elena and her absent spouse. Write the correct facts for a certificate being prepared now. Then explain what changes if the erroneous act was already completed and delivered.

8. Run the complete appointment simulation | 8 minutes

Spend six minutes writing an appointment plan for a physically present signer requesting a jurat on a completed declaration signed yesterday. The signer has a qualifying current California ID and can communicate directly. A supervisor asks for yesterday's certificate date. Include the new signing, oath, journal, venue, certificate date, fee record, and refusal of the requested shortcut. Use the remaining two minutes to change the case to an acknowledgment and compare what differs before reading the debrief.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 8 minutes. Parent total: 54 minutes.

II-B2 Types of Notary Public Acts and How to Perform the Acts | Acknowledgments

Learning outcome: Distinguish acknowledgment from signature witnessing, complete truthful certificate facts, and recognize prohibited capacity statements. 14 minutes of instruction and case work, then an 8-minute quiz.

1. Establish what the signer acknowledges | 4 minutes

Use two minutes to rehearse the conversation with a signer who signed yesterday. Then change the facts: the signer says the signature belongs to a spouse who is absent. State what can proceed in each version and why.

2. Complete the California certificate | 4 minutes

Spend two minutes drafting the factual fields: the document was signed August 2; the signer appears August 9 in Fresno County; the notary filed the oath in Alameda County. List the correct date and county, and explain why neither earlier signing nor the seal's county controls.

3. Separate capacity wording from capacity certification | 3 minutes

Use one minute to compare these certificate demands: 'personally appeared Jordan' and 'I certify Jordan is the duly authorized president of this corporation.' Explain which additional assertion creates a problem for the California notary.

4. Rehearse a refusal and a corrected plan | 3 minutes

Use two minutes for the case below. Write a two-sentence explanation of what is allowed and what must be declined; do not choose a different legal act for the signer.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 8 minutes. Parent total: 22 minutes.

II-B3 Types of Notary Public Acts and How to Perform the Acts | Jurats

Learning outcome: Carry out a complete jurat and distinguish sworn participation from merely checking a signature. 13 minutes of instruction and practice, then an 8-minute quiz.

1. Identify the additional acts a jurat requires | 4 minutes

Spend two minutes explaining the process to a customer who signed a requested jurat document at home. Include what must happen now and why recognizing the old signature is insufficient.

2. Make the oath or affirmation an actual exchange | 3 minutes

Use one minute to write the question you would ask a signer who requests an affirmation and cannot raise a hand. Then explain what you would do if the signer refuses any assurance of truth.

3. Complete the certificate without enlarging its meaning | 3 minutes

Use one minute to separate three facts: the signer swore the statement was true; the notary witnessed the signature; the notary independently proved the statement's business claims. Which two belong to the notarial encounter, and why is the third different?

4. Find the omitted step before the signer leaves | 3 minutes

Spend two minutes auditing this case: a signer appears, shows qualifying ID, signs, and leaves; the notary realizes no oath or affirmation was administered. Explain why a phone call later and a backdated certificate do not reproduce a complete properly conducted jurat.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 8 minutes. Parent total: 21 minutes.

II-B4 Types of Notary Public Acts and How to Perform the Acts | Proof of Execution by a Subscribing Witness

Learning outcome: Screen the instrument, distinguish witness roles, and trace the required oaths and journal entries. 12 minutes of instruction and case work, then an 8-minute quiz.

1. Screen the document before recruiting witnesses | 3 minutes

Use one minute to sort an ordinary grant deed, a power of attorney, and an otherwise eligible non-real-property agreement. Which can even be considered for proof, assuming no other exclusion?

2. Establish the subscribing witness's knowledge | 3 minutes

Spend two minutes drawing three people: principal, subscribing witness, credible witness. Under the subscribing witness, list four assertions needed about the principal and the signing. Then explain why a courier who only collected an envelope cannot fill that role.

3. Use the required identity chain | 3 minutes

Use two minutes to evaluate: the subscribing witness has a passport; a second person knows that witness but has never met you. Is the identity chain complete? What relationship and evidence are missing?

4. Rehearse without merging the roles | 3 minutes

Spend two minutes writing the sequence for the case below, beginning with instrument screening. Identify whose appearance the certificate can truthfully describe and whose journal signature is required.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 8 minutes. Parent total: 20 minutes.

II-B5 Types of Notary Public Acts and How to Perform the Acts | Signature by Mark

Learning outcome: Apply the document and journal procedures without treating inability to write a conventional signature as inability to participate. 5 minutes of instruction and practice, then a 5-minute quiz.

1. Witness the mark and identify the signer | 3 minutes

Use one minute to label the roles when an identified signer makes a mark witnessed by two friends. Which people supply document witness signatures, and does their presence eliminate the identity check?

2. Complete the journal mark separately | 2 minutes

Spend one minute comparing the two locations of the mark. List what accompanies the document mark and what accompanies the journal mark before checking the debrief.

Module scenario discussion occurs within the lesson allocations. 5 quiz items and correction: 5 minutes. Parent total: 10 minutes.

II-B6 Types of Notary Public Acts and How to Perform the Acts | Certifying Copies

Learning outcome: Separate power-of-attorney copy certification, public-record copies, and a custodian's sworn statement. 5 minutes of instruction and practice, then a 5-minute quiz.

1. Do not assume general copy-certification authority | 3 minutes

Use one minute to compare a power of attorney with its original available, a birth-certificate photocopy, and a diploma photocopy. Identify the statutory authority or appropriate referral rather than stamping all three alike.

2. Understand tangible electronic-record certification | 2 minutes

Explain in one minute why a buyer who directly benefits from the recorded instrument cannot simply be treated as the disinterested custodian in this procedure.

Module scenario discussion occurs within the lesson allocations. 5 quiz items and correction: 5 minutes. Parent total: 10 minutes.

II-B7 Types of Notary Public Acts and How to Perform the Acts | Immigration Documents

Learning outcome: Distinguish notarization from form assistance, screen advertising, and apply the special data-entry fee rule. 7 minutes of instruction and case work, then a 6-minute quiz.

1. A commission does not authorize immigration assistance | 3 minutes

Use one minute to classify three requests: a lawful jurat on a completed statement; typing the client's dictated answers into immigration forms while qualified only as a notary; recommending which immigration status to pursue.

2. Review the message an advertisement conveys | 2 minutes

Spend one minute auditing an ad headed 'Notario Publico - Immigration Specialist' with a small non-attorney disclaimer. Identify two problems that the disclaimer does not cure.

3. Separate data-entry fees from notarial fees | 2 minutes

For one individual and one set of four forms, calculate the maximum covered data-entry fee before notarizations. Then explain why four pages do not produce four fees.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 6 minutes. Parent total: 13 minutes.

II-B8 Types of Notary Public Acts and How to Perform the Acts | Protests, Depositions and Confidential Marriages

Learning outcome: Recognize the limits on protests, distinguish a deposition from a routine jurat, and separate marriage-license authorization from solemnization. 7 minutes of instruction and case work, then a 6-minute quiz.

1. A protest is a specialized commercial act | 2 minutes

Explain in one minute why a freelance notary should not advertise a 'protest service' for ordinary overdue invoices solely on the strength of the commission.

2. A deposition involves its own procedural setting | 2 minutes

Calculate in one minute the maximum for all three stated deposition components, then explain why that amount does not apply to a routine affidavit jurat.

3. Confidential license issuance is not a wedding commission | 3 minutes

Use two minutes to build an authority checklist for a notary asked to issue a confidential license and perform the ceremony tomorrow. Name the approving authority and separate qualification to verify; draft a response if neither has been established.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 6 minutes. Parent total: 13 minutes.

II-C Fees

Learning outcome: Apply per-signature and per-service limits, recognize mandatory free acts, and audit an itemized invoice. 11 minutes of reading and calculation practice, then an 8-minute quiz.

1. Identify the unit before multiplying | 3 minutes

Use two minutes to calculate: three acknowledged signatures on one instrument; one person's jurat on a ten-page declaration; one certified power-of-attorney copy. Then compare the respective maximums with a proposal to charge $20 per page.

2. Check the mandatory no-fee categories | 3 minutes

Use two minutes to sort a vote-by-mail signature, a veteran's benefit claim, and that veteran's unrelated business lease acknowledgment. Explain which facts determine a mandatory zero notarial fee and record what the journal should say.

3. Keep ancillary charges and record requests distinct | 2 minutes

In January 2027, Phil quotes John $75: two acknowledged signatures at $20 each and $35 genuinely agreed travel. Itemize the invoice and identify the actual notarial fee to record.

4. Audit a quote before collecting payment | 3 minutes

Use two minutes to audit: one person's jurat is quoted at $20 plus $5 for the included seal, an acknowledged two-signature instrument at $40, and a two-page public journal copy at $20. Identify each incorrect line, replace it with the applicable maximum, and explain the unit.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 8 minutes. Parent total: 19 minutes.

III-A Conflict of Interest

Learning outcome: Distinguish a direct personal interest from acting as an employee, and identify when another notary is required. 5 minutes of instruction and case work, then a 5-minute quiz.

1. Look for the notary as an individual party | 3 minutes

Spend one minute comparing a notary named individually as buyer in a deed with an employee notarizing a customer's document for the employer. Identify the decisive fact, not merely who pays the salary or fee.

2. Handle family requests without a blanket shortcut | 2 minutes

Use one minute to explain why 'I will notarize my own lease as lessee for free' still fails, and why 'the signer is my cousin' does not by itself answer the conflict question.

Module scenario discussion occurs within the lesson allocations. 5 quiz items and correction: 5 minutes. Parent total: 10 minutes.

III-B Giving Legal Advice/Practicing Law

Learning outcome: Recognize document-selection and legal-advice requests, give useful procedural explanations, and refer unresolved legal decisions. 5 minutes of instruction and practice, then a 5-minute quiz.

1. Distinguish explanation from recommendation | 3 minutes

Use one minute to rewrite: 'You should use a quitclaim deed and an acknowledgment; that will protect your share.' Preserve useful assistance while removing document selection and the promised legal result.

2. Do not let disclaimers disguise unauthorized work | 2 minutes

Spend one minute classifying: explaining acceptable ID; recommending how to transfer property; explaining the oath in a requested jurat; filling a missing legal ownership percentage. Identify which requests need referral.

Module scenario discussion occurs within the lesson allocations. 5 quiz items and correction: 5 minutes. Parent total: 10 minutes.

III-C Reasons for Commission Revocation or Suspension, or Application Denial

Learning outcome: Recognize grounds for denial, suspension, and revocation; preserve records and understand that multiple consequences can coexist. 14 minutes of instruction and case work, then an 8-minute quiz.

1. Trace the duty instead of waiting for a criminal charge | 4 minutes

Spend two minutes pairing conduct with duties: a material conviction omitted from an application; a jurat completed without an oath; and a seal kept in an unlocked shared drawer. For each, explain why 'no complaint yet' does not resolve the issue.

2. Separate deliberate falsehood from an unresolved error | 4 minutes

Use two minutes to draft a refusal to a manager asking you to backdate a certificate by two days. Then write the factual note you would preserve about the request, without inventing a completed act or accusing anyone beyond the facts known.

3. Cooperate with official requests while protecting records | 3 minutes

Spend one minute explaining why these two statements are wrong: 'The journal is mine, so no official may access it' and 'I resigned, so the state cannot examine what I did.'

4. Understand the process without predicting its result | 3 minutes

Use two minutes to write a case assessment for a notary who overcharged and omitted an oath, then resigned when a complaint arrived. Identify possible administrative issues, records to preserve, and why the final sanction cannot be inferred solely from this short account.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 8 minutes. Parent total: 22 minutes.

III-D Civil Penalties

Learning outcome: Distinguish statutory penalty ceilings, damages, and commission sanctions using concrete cases. 11 minutes of instruction and comparison exercises, then an 8-minute quiz.

1. Separate a penalty ceiling from damages | 3 minutes

Use one minute to explain why a person who causes $40,000 in proven damages cannot conclude that a $15,000 bond necessarily limits personal liability to $15,000.

2. Compare the section 8214.15 tiers | 3 minutes

Spend two minutes building four rows: overcharging; negligent general failure of duty; willful general failure of duty; knowingly false certificate under section 8214.15. Give the relevant ceiling under that section, then identify why that does not settle all possible exposure.

3. Learn the distinct $2,500 and $10,000 provisions | 3 minutes

Spend two minutes matching: an omitted required deed thumbprint; a willful false appearance statement in an acknowledgment; willful refusal of authorized peace-officer journal access. Name each applicable provision and ceiling, then add a factual condition that must be verified.

4. State the conclusion with its limits | 2 minutes

Use one minute to rewrite 'Every false certificate costs exactly $10,000 and that is the most the notary can lose.'

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 8 minutes. Parent total: 19 minutes.

III-E Felonies or Possible Felonies

Learning outcome: Recognize specific real-property fraud and forgery provisions without labeling every error a felony. 7 minutes of instruction and case work, then a 6-minute quiz.

1. Read every element of the deed-of-trust provision | 3 minutes

Spend one minute listing the elements in this case: a notary knows a deed of trust on a qualifying residence is forged and deliberately completes the act to help obtain fraudulent loan funds. Then state which facts would be missing from a case describing only an accidental wrong digit.

2. Distinguish uncommissioned conduct and forgery | 2 minutes

Use one minute to compare an expired-commission person purporting to notarize a qualifying residential deed with someone forging a notary's seal for fraud. Identify why the offenses involve different facts even if the same transaction could contain both.

3. Respond to fraud indicators without inventing a verdict | 2 minutes

Spend one minute drafting a refusal when a broker offers extra money to notarize an absent owner's signature on a deed of trust and says the owner will appear tomorrow.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 6 minutes. Parent total: 13 minutes.

III-F Misdemeanors or Possible Misdemeanors

Learning outcome: Recognize specified misdemeanor conduct by notaries and others, and distinguish intent from an unsupported accusation. 5 minutes of instruction and case work, then a 6-minute quiz.

1. Records and seals are more than office property | 3 minutes

Use one minute to compare destroying an invalid seal with shredding journal pages to hide missed entries. Explain why the first may fulfill a duty while the second violates one.

2. Others can violate notary-related law too | 2 minutes

Use one minute to identify who may have a problem when a manager knowingly orders a false acknowledgment and an uncommissioned assistant uses the absent notary's stamp. Separate each person's conduct.

Module scenario discussion occurs within the lesson allocations. 10 quiz items and correction: 6 minutes. Parent total: 11 minutes.

III-G Infractions by Notaries Public

Learning outcome: Apply the address and name-notification rules without confusing them with amended-commission filing deadlines. 5 minutes of instruction and case work, then a 5-minute quiz.

1. Address notice has an explicit 30-day deadline | 2 minutes

Spend one minute assessing a notary who knowingly decides to defer a home-address update until renewal eight months later. Identify the required action, triggering event, and stated maximum fine for willful failure.

2. Name notice and amended filing are different steps | 3 minutes

Use two minutes to draw three events: personal name change, amended commission issuance, amended oath-and-bond filing. Attach the required application, the filing clock, and the seal clock to the correct event. Then explain why the name change does not restart a four-year term.

Module scenario discussion occurs within the lesson allocations. 5 quiz items and correction: 5 minutes. Parent total: 10 minutes.

11. Source register and provenance

S1 - Baseline handbook

https://notary.cdn.sos.ca.gov/forms/notary-handbook-current.pdf

2026 handbook baseline; download path may later serve a new edition. Retain the edition actually reviewed.

S2 - Education regulations

https://www.sos.ca.gov/administration/regulations/current-regulations/business/notary-public

Current-regulations webpage checked November 2, 2026. Lesson plan requirements: 20800.1(a)-(i); related vendor duties: 20800 through 20800.9. The page body repeats the Proof of Completion heading for 20800.6; its contents list and provisions identify attendee records.

AB 1597 - Chapter 39, Statutes of 2026

https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=202520260AB1597

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AB 1828 - Chapter 275, Statutes of 2026

https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=202520260AB1828

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AB 1828 - chaptered text reproduction

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AB 1977 - Chapter 280, Statutes of 2026

https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=202520260AB1977

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