



## CertifiO for Professionals

# Signing up for a digital signature

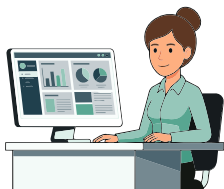
The Notarius digital signature, CertifiO for Professionals, is a digital signature certificate that confirms your identity, professional designation, Member ID and status with your designated professional regulatory organization.

## Signing Up

*For smaller organizations, the entire process can be completed by the individual applicant.*

*For larger companies, there may be more people involved based on the security level settings of the organization. This document outlines the roles and responsibilities of all participants involved in the onboarding of a new CertifiO for Professionals applicant.*

## Key Roles



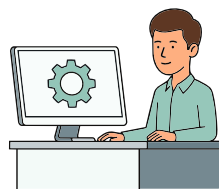
Company Project  
Manager



Applicant



Notarius IVA



Company IT  
Support



Notarius  
Customer  
Support

# Key Steps

1



Optional

5 min

## Project manager opens a corporate billing account

Companies with 5 or more users can open a corporate account. A company Project Manager must be named to handle the corporate deployment of digital signatures.

### Important:

For companies with less than 5 subscriptions, payment must be completed online by credit card.

Link to open corporate billing account form:

[notarius.com/corporatebilling](https://notarius.com/corporatebilling)

| If you have completed Step 1, wait until the account is created before going to Step 2.

2



5 min

## Applicant fills out personal subscription form for authorized association

The Applicant must individually sign up to register for their personal CertifiO for Professionals digital signature.

### Important:

This step can only be completed by the Applicant. It includes a series of personal questions/answers that are used to identify the applicant and access their online account.

Link to applicant subscription form:

[portagecybertech.com/en/products/certifio](https://portagecybertech.com/en/products/certifio)

3



10 min

## Applicant schedules face-to-face id vetting for a CertifiO for Professionals digital signature

Once the personal subscription form is completed by the Applicant, an email is sent to schedule a face-to-face online meeting with a Notarius appointed Identity Verification Agent (IVA).

### Important:

The simplest and most efficient way to conduct an ID vetting session is with a smart phone equipped with a camera and microphone.

Link to preparation and online face-to-face identity verification:

[notarius.com/idverification](https://notarius.com/idverification)

4



15 min

## Company IT Support installs CertifiO Suite software for Applicant

Notarius provides a complete set of software tools, CertifiO Suite, to activate and use CertifiO for Professionals digital signatures. However, since CertifiO Suite requires administrative rights to install, the intervention of a Company IT Support resource will be required to complete this step.

### Important:

CertifiO Suite is included for free with CertifiO for Professionals and can be installed on any corporate computer.

If CertifiO Suite is not installed, the applicant will not be able to activate their CertifiO for Professionals digital signature.

### Link to download CertifiO Suite:

[notarius.com/  
downloadCertifiOsuite](https://notarius.com/downloadCertifiOsuite)

5



5 min

## After approval, Applicant must activate CertifiO for Professionals digital signature

CertifiO for Professionals digital signature will not be emailed to you, but rather activated by entering a reference code and answering secret questions that only the Applicant would know the answers to.

### Important:

At the end of this process, the Applicant will have a fully functional CertifiO for Professionals digital signature that can be used to authenticate electronic documents.

Certain ports must be opened or a proxy must be configured to allow CertifiO Suite to reach the Notarius Certificate Authority and activate the CertifiO for Professionals digital signature.

### Link to minimum requirements:

[notarius.com/  
CertifiOrequirements](https://notarius.com/CertifiOrequirements)

# Troubleshooting

Technical issue	Potential cause	Solution	Link
Cannot activate CertifiO for Professionals digital signature	CertifiO Suite is not installed	Contact Company IT Support to install CertifiO Suite	<a href="https://portagecybertech.com/en/resources/downloads#Certifi-oSuite">portagecybertech.com/en/resources/downloads#Certifi-oSuite</a>
Cannot activate CertifiO for Professionals digital signature	Firewall or Proxy not configured to communicate with Notarius' Certificate Authority	Contact Company IT Support to configure Firewall or Proxy	<a href="https://notarius.com/proxy-configuration">notarius.com/proxy-configuration</a>
Cannot install CertifiO Suite	Applicant lacks administrative rights to install software on their computer	Contact Company IT Support to install CertifiO Suite	<a href="https://notarius.com/install-certifio-suite">notarius.com/install-certifio-suite</a>
Software Suite takes 20 minutes to install	Firewall or Proxy not configured to communicate with Notarius' Certificate Authority	Contact Company IT Support to configure Firewall or Proxy	<a href="https://notarius.com/proxy-configuration">notarius.com/proxy-configuration</a>



## Customer Care

Notarius serves a large community of users from coast to coast.

As such, our digital signature service includes a variety of training tools and assistance, free of charge.

### Help/FAQ Section:

[notarius.com/help](https://notarius.com/help)

### ConsignO Desktop Training Videos:

[notarius.com/videos](https://notarius.com/videos)

### ConsignO Desktop User Guide:

[notarius.com/guide](https://notarius.com/guide)

### Support via Email:

[support@notarius.com](mailto:support@notarius.com)

### Support via Phone:

[1-855-505-7272](tel:1-855-505-7272)