A Notary Visit for a Loved One in a Hospital or Nursing Home

California preparation guide and appointment checklist

Please read before scheduling. California requires the signer to appear personally and communicate with the notary for the requested acknowledgment or oath. I must be able to communicate directly with the signer and be satisfied that the signer knows they are signing the document presented and wants to proceed. If I cannot do that, I cannot complete the notarization.

What the signer needs to be able to do

At the appointment, the signer must be able to communicate with me directly. They may use speech, writing, a communication board, eye movement, or another method they use reliably. I will speak to the signer, ask neutral questions, and confirm their choice myself. A family member, caregiver, or nurse may help position a communication aid, but cannot answer for the signer or interpret unclear signals for them.

The signer must also understand that this is the document they are choosing to sign. They do not need to explain its legal effect to me. I cannot explain or choose legal documents, assess medical or legal capacity, or decide whether a document is right for them. If the signer seems unsure, does not know what is being signed, cannot communicate a clear choice, or is too tired or distressed, I will pause and cannot proceed.

Before the visit

Tell the signer that a notary is coming and why. If possible, schedule for a time when they are usually alert and comfortable. Bring the full document, acceptable identification, and any communication aid the signer routinely uses. Coordinate visitor access and any facility requirements.

Do not sign or initial the document before I arrive. The signer must personally complete each required signature or mark. A family member or staff member cannot sign the signer’s name or journal entry for them.

If the signer cannot sign their name

California permits a signer who cannot sign their name to use a Signature by Mark if they can intentionally make a mark themselves. This requires specific witnesses for the document, and the signer must also make a separate mark in the notary journal. See page 3.

This guide prepares the visit. It does not replace the signer’s personal participation or the notary’s decision at the appointment.

Pre-Appointment Readiness Checklist

A family member or appointment arranger may complete this checklist before the visit. It helps us prepare, but it does not decide whether the signer can proceed. I must communicate with the signer directly at the appointment. If you are unsure about any item, contact me before I travel.

Appointment details

Signer name (optional for this checklist)

Hospital or nursing home / unit / room

Appointment date and time

Please check each item you can confirm

- ☐ The signer has been told that a notary will visit and knows the general reason for the visit.
- ☐ The signer wants to meet with the notary. I understand the notary will confirm this directly with the signer.
- ☐ I can tell the notary how the signer usually communicates (speech, writing, yes/no signals, communication board, or other aid).
- ☐ The signer has their usual glasses, hearing aids, communication board, or other aid available, if needed.
- ☐ I have the complete document and all pages. Required signature and notary spaces are still blank.
- ☐ The signer has acceptable identification available, or I have contacted the notary to discuss identity requirements.
- ☐ The facility knows about the visit and has confirmed any visitor, room-access, or timing requirements.
- ☐ If the signer may use Signature by Mark, two adult witnesses can be present to witness the signer make the document mark. The notary will explain the process.

> At the appointment: The signer must personally communicate with me, know they are signing the document presented, and choose to proceed. The signer must personally sign or make a mark. A checked box on this form cannot replace any of those steps.

Person completing checklist / relationship to signer

Best phone number for appointment coordination

If a notarization cannot be completed

If I have already departed for a local appointment within 3 miles and cannot perform the notarization because the signer is unavailable, not ready, unable to communicate a clear choice, cannot confirm they know what document they are signing, or cannot personally sign or make a mark, a $35 visit/travel fee will apply. This is separate from any notarial fee. No notarial fee is charged for a notarial act that is not performed. For locations more than 3 miles away, I will disclose the visit/travel fee and obtain agreement before departure. If the appointment is canceled before I depart, no visit/travel fee is due.

California Signature by Mark

A Signature by Mark is an option only when the signer cannot sign their name in writing but can personally and intentionally make a mark. It does not allow another person to create the signer's mark, signature, or initials.

Document: two witnesses

Two people must witness the signer make the mark on the document and subscribe their own names as witnesses. One witness writes the signer's name next to the mark and signs their own name as a witness. These witnesses verify that they saw the signer make the mark; they do not establish the signer's identity. The notary still verifies identity under California requirements.

Notary journal: a separate mark

The signer must also personally make a mark in the notary's journal. One person witnesses that journal mark, writes the signer's name next to it, and signs their own name as witness. This journal step is separate from witnessing the mark on the document.

> The signer must control the mark. Do not move or guide the signer's hand to create a mark. If the signer cannot make any mark or signature, stop and ask the document preparer or attorney about possible next steps.

What if the signer cannot proceed?

I will not complete the notarization if I cannot communicate directly with the signer, confirm that they know they are signing the document presented and want to proceed, establish identity, or witness the signer personally sign or make a mark. A blinked "yes" to one question may not be enough if I cannot reliably understand the signer's yes/no responses. I will use neutral questions and the signer's usual communication method. If the response is unclear or inconsistent, I will pause.

A family member or agent may not answer the notary's questions for the signer. A power of attorney or other representative arrangement is document-specific; please confirm any alternative signing process with the drafting attorney or organization receiving the document before the visit. I cannot decide whether someone else may sign in a particular transaction.

Thumbprint note

California generally requires a journal thumbprint for a power of attorney and certain real-property documents. If the signer is physically unable to provide a thumbprint or available fingerprint, the notary records that fact and an explanation in the journal, as required by law.

Official references

2026 California Notary Public Handbook, "Signature by Mark" (pp. 16-17), communication requirement (p. 23), and journal fee note; California Civil Code section 14; California Government Code section 8206(a)(2). Open the California Secretary of State handbook.

Visit Fee Acknowledgment

Please review this page before the appointment. The person arranging the visit should check the applicable box and sign below. This is a service and travel-fee acknowledgment only. It is not a notarized document and does not authorize anyone to sign for the patient.

Local non-completion visit/travel fee: $35 for appointments within 0-3 miles. If the visit is more than 3 miles away, the fee will be quoted and agreed before I depart. This charge covers the dispatched visit when no notarial act can be completed for the readiness reasons listed on page 2. No fee for a notarial act will be charged unless that act is performed.

Please check each statement

- ☐ I have read the preparation guide and understand the signer must communicate directly with the notary.
- ☐ I understand the signer must know they are signing the document presented, want to proceed, and personally sign or make a mark.
- ☐ I understand the notary will stop if these requirements are not met, even if the appointment has been scheduled.
- ☐ I agree to the visit/travel fee stated above if the notary has departed and cannot complete the appointment for a reason covered by this guide.

Agreed visit/travel fee (if more than 3 miles): $

_____

Name of person arranging and agreeing to the visit

_____

Signature of person arranging the visit

_____

Relationship to signer / date

_____

Scheduling reminder

Please send the completed checklist and fee acknowledgment before the appointment. Keep all document signature and notary certificate spaces blank until the appointment. If the signer’s alertness or communication changes, contact me before I travel so we can discuss rescheduling.

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