INSURANCE TECHNOLOGIES

Validate Identity Verification Changes
FIRELIGHT BASE

FireLight®

Platform

INSURANCETECHNOLOGIES.COM

Insurance Technologies, LLC

Insurance Technologies, LLC
Two South Cascade Avenue
Colorado Springs, CO 80903
USA
Phone: 719.442.6400
FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com
Website: http://www.insurancetechnologies.com

Table of Contents

iConnect Design Approach - Validate Identity Verification Changes

Project Overview

Validate Identity Verification (VIV) is currently set up as an organizational setting. This can cause some organizations who use it to have applications stall with signatures that do not have the SSN/DOB within the application. For this enhancement, FireLight will now support sending a passcode for defined signature controls which will allow firms to bypass the normal DOB and SSN verification. To support this, an override for the Validate Identity Verification at the signature control level was added with a checkbox to indicate "passcode only". When checked for that signature control, it will override the Validate Identity Verification for that specific signature control only and only require the passcode.

Impacts:

Validate Identity Verification Functionality - can be overridden by signature controls

Signature/ Field Properties - adding a checkbox that will override the VIV functionality

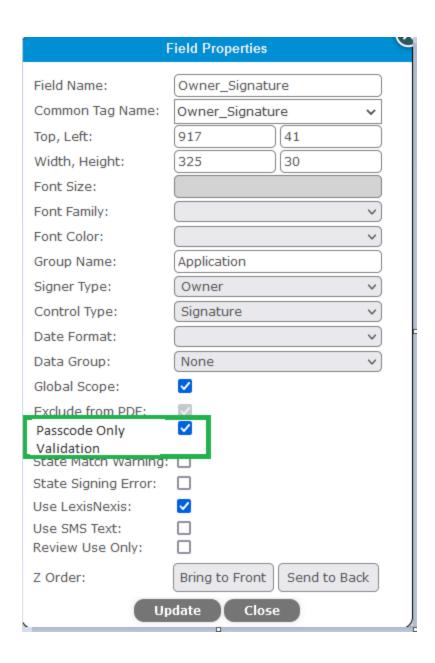Passcode Functionality - Allowing the use of passcode functionality when checked in a signature control

1 Add a checkbox to Signature Control to override Validate Identity Verification

We will want to add a checkbox to the Signature control that will override the Validate Identity Verification functionality if it is checked in the Organization settings. This checkbox will be named "Passcode Only Validation".

Field Properties

Field Name:	Owner_Signature
Common Tag Name:	Owner_Signature
Top, Left:	917 / 41
Width, Height:	325 / 30
Font Size:	
Font Family:	
Font Color:	
Group Name:	Application
Signer Type:	Owner
Control Type:	Signature
Date Format:	
Data Group:	None
Global Scope:	☑
Exclude from PDF:	☑
Passcode Only Validation	☑
State Match Warning:	☐
State Signing Error:	☐
Use LexisNexis:	☑
Use SMS Text:	☐
Review Use Only:	☐
Z Order:	Bring to Front / Send to Back

Update   Close

Acceptance Criteria

- In the Signature control field properties, a new checkbox called "Passcode Only Validation" will appear

2   Use of the Passcode Only Validation in Field Properties

If this checkbox is checked when the Validate Identity Verification is checked in Organization Settings, it will then use the passcode validation functionality for this specific signature. All other signatures that do not have this checkbox checked will use the Validate Identify Verification. If this checkbox is checked when Validate Identity Verification is not checked in the organization settings, the passcode validation functionality will still occur for that signature.

If Passcode Validation is turned on at the organization level, then this checkbox will be disabled.

Acceptance Criteria

- If Validate Identity Verification is checked in the organization settings, the passcode only validation in the field properties will be enabled and ready for use
- If Validate Identity Verification is checked in the organization settings, and the passcode only validation in the field properties is checked, then the Passcode Only functionality will override the Validate Identity verification functionality for that signature only.
- If Passcode Only Validation is checked in the organization settings, the Passcode Only validation on the field properties will be disabled.
- If neither Validate Identity Verification or Passcode Only Validation are checked in organization settings, the Passcode Only Validation on the field properties will be enabled and available for use on a single signature
- Test case: have org setting on, select signer and check, then uncheck in the validate identity in org. What will the disabled checked box do in signer?
- DocuSign and TeleSign is out of scope
- React and legacy signing - testing