
Validate Identity Verification Changes

FIRELIGHT BASE

FireLight®

Platform

VALIDATE IDENTITY VERIFICATION CHANGES

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Insurance Technologies, LLC

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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:	<input type="text" value="Owner_Signature"/>	
Common Tag Name:	<input style="background-color: #f0f0f0;" type="text" value="Owner_Signature"/>	
Top, Left:	<input type="text" value="917"/>	<input type="text" value="41"/>
Width, Height:	<input type="text" value="325"/>	<input type="text" value="30"/>
Font Size:	<input style="background-color: #f0f0f0;" type="text" value=""/>	
Font Family:	<input style="background-color: #f0f0f0;" type="text" value=""/>	
Font Color:	<input style="background-color: #f0f0f0;" type="text" value=""/>	
Group Name:	<input type="text" value="Application"/>	
Signer Type:	<input style="background-color: #f0f0f0;" type="text" value="Owner"/>	
Control Type:	<input style="background-color: #f0f0f0;" type="text" value="Signature"/>	
Date Format:	<input style="background-color: #f0f0f0;" type="text" value=""/>	
Data Group:	<input style="background-color: #f0f0f0;" type="text" value="None"/>	
Global Scope:	<input checked="" type="checkbox"/>	
Exclude from PDE:	<input checked="" type="checkbox"/>	
Passcode Only Validation	<input checked="" type="checkbox"/>	
State Match warning:	<input type="checkbox"/>	
State Signing Error:	<input type="checkbox"/>	
Use LexisNexis:	<input checked="" type="checkbox"/>	
Use SMS Text:	<input type="checkbox"/>	
Review Use Only:	<input type="checkbox"/>	
Z Order:	<input type="button" value="Bring to Front"/> <input type="button" value="Send to Back"/>	
<input type="button" value="Update"/> <input type="button" value="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