

Validate Identity Verification Changes

FIRELIGHT BASE



VALIDATE IDENTITY VERIFICATION CHANGES

Document Version: 1.1

Published: March 24, 2022



Insurance Technologies, LLC

Copyright © 2020 Insurance Technologies, LLC, all rights reserved.

Insurance Technologies, ForeSight[®] and FireLight[®] are registered or unregistered trademarks of Insurance Technologies, LLC (IT) in the USA and/or other countries.

ACORD, ACORD ObjX, ACORD OLifE, AL3, ACORD Advantage, ACORD XML, and "Association for Cooperative Operations Research and Development" are registered or unregistered trademarks of ACORD Corporation in the USA and/or other countries.

Microsoft, Microsoft SQL Server, Microsoft Internet Information Server, Windows, and other Microsoft names and logos are either registered or unregistered trademarks of Microsoft Corporation in the U.S.A. and/or other countries.

All other trademarks are the property of their respective owners.

The information contained in this document is current as of the date of the publication. Because Insurance Technologies, LLC must respond to changing market conditions and technology advances, Insurance Technologies, LLC cannot guarantee the accuracy of any information presented after the date of publication.

INSURANCE TECHNOLOGIES, LLC MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS DOCUMENT AND HEREBY DISCLAIMS ANY AND ALL SUCH WARRANTIES.

The material contained in this document is considered confidential and the intellectual property of Insurance Technologies, LLC. The recipient is given access to this material on the condition that the recipient (1) will keep the information confidential at all times, and (2) will not copy or modify or share the materials, except as expressly authorized by Insurance Technologies, LLC. The recipient should limit its disclosure of the information and materials only to its employees who have a clear business purpose and need to receive such information and materials and who are bound by confidentiality obligations to the recipient that are at least as protective of such information and materials as those contained herein.

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

iCon	nnect Design Approach - Validate Identity Verification Changes	4
1	Add a checkbox to Signature Control to override Validate Identity Verification	4
2	Use of the Passcode Only Validation in Field Properties	6





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

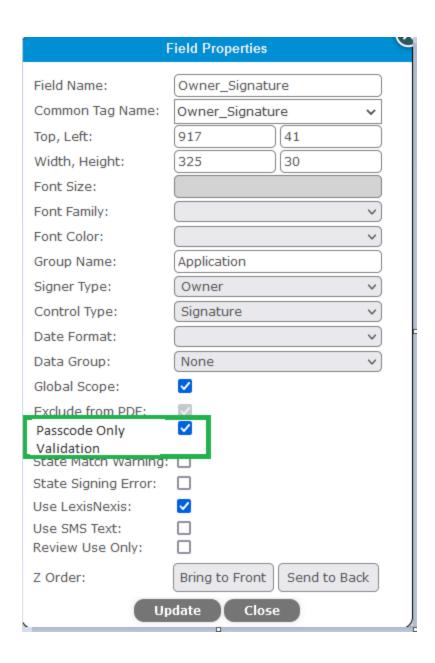
Passcode Functionality - Allowing the use of passcode functionality when checked in a signature control

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".







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