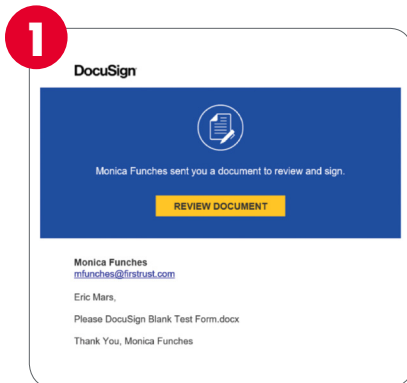# DOCUSIGN: SIGNING DOCUMENTS WITH ID VERIFICATION
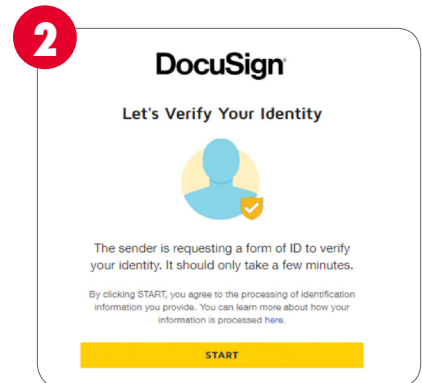
FIRSTRUST BANK

If you are an envelope recipient that has been added to DocuSign ID Verification, you must complete the identity verification process in DocuSign in order to view your loan documents. You will be prompted to select the country that issued your ID and then go through the ID presentation and validation steps.

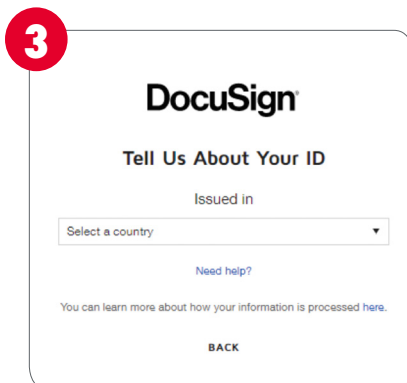## TO SIGN DOCUMENTS WITH ID VERIFICATION

1

1. From the email notification, click "REVIEW DOCUMENT" to begin the signing process.
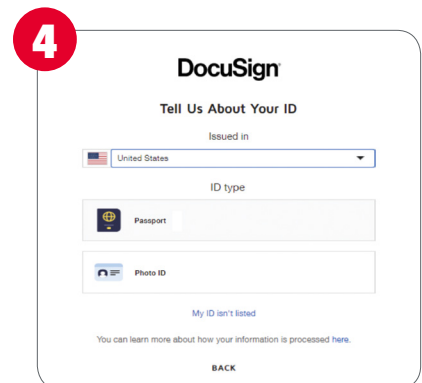
2. In the "Let's Verify Your Identity" screen, click "START".

2

3. Select the country that issued your identification documents or electronic ID.

3

4. Depending on which country you select, choose which government-approved ID you will provide.

For example, if you select United States, the ID options are Passport or Photo ID. If Norway or Denmark is selected, you may have the choice to verify your identity using an electronic ID.
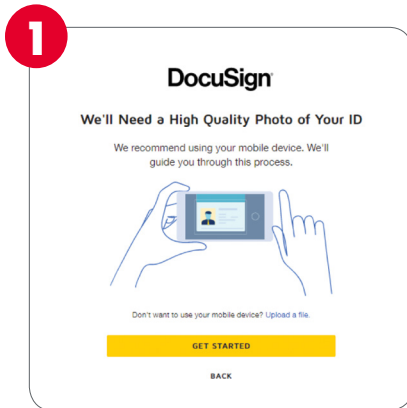
4
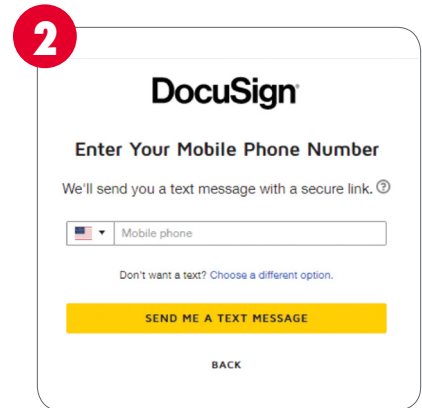
5. Depending on the ID you selected, you can either:
- use your mobile phone for capturing or uploading the image of your ID
- use your computer for capturing or uploading the image of your ID
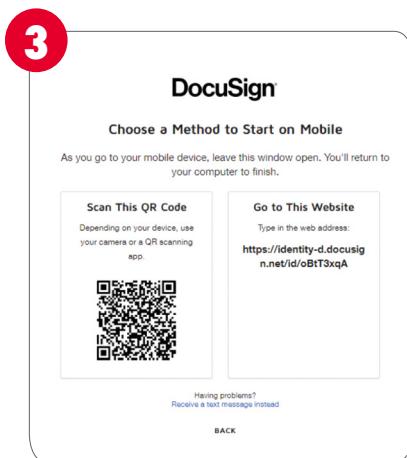- use an electronic ID to verify your identity

Note: *Screen shots from this section are based on passport verification. Passport and Photo ID verification processes are similar, however screens may differ from one method to another.*

1

1. In the "We'll Need a High-Quality Photo of Your ID" screen, click "GET STARTED".

2. Enter your mobile phone number to be redirected to the ID capture experience on your smartphone. Alternatively, click the "Choose a different option" link to be redirected to the ID capture experience without entering your phone number.

2

3

3. If you clicked the "Choose a different option" link, then the "Choose a Method to Start on Mobile" screen displays. You can access the ID capture experience either by scanning the provided QR Code or by entering the supplied hyperlink on your mobile phone.

4. If you entered your mobile phone number to be redirected to the ID capture experience, then DocuSign displays the following waiting page.

4

5

5. As you're redirected to the ID capture experience on your mobile phone, DocuSign now displays the following processing page. Ensure that you do not close this window until you are done with the verification process.

6. On your mobile phone, click "CONTINUE" in the screen that explains how to take good photos for identity verification.

6

7. To capture your ID document, you can either use the camera on your mobile phone or upload an existing image. The specifics will vary depending on the identification type you are using.

For example, a passport requires only the picture page, but a U.S. driver's license requires both the front and back of the license. For more information, see How to take a photo of your ID?
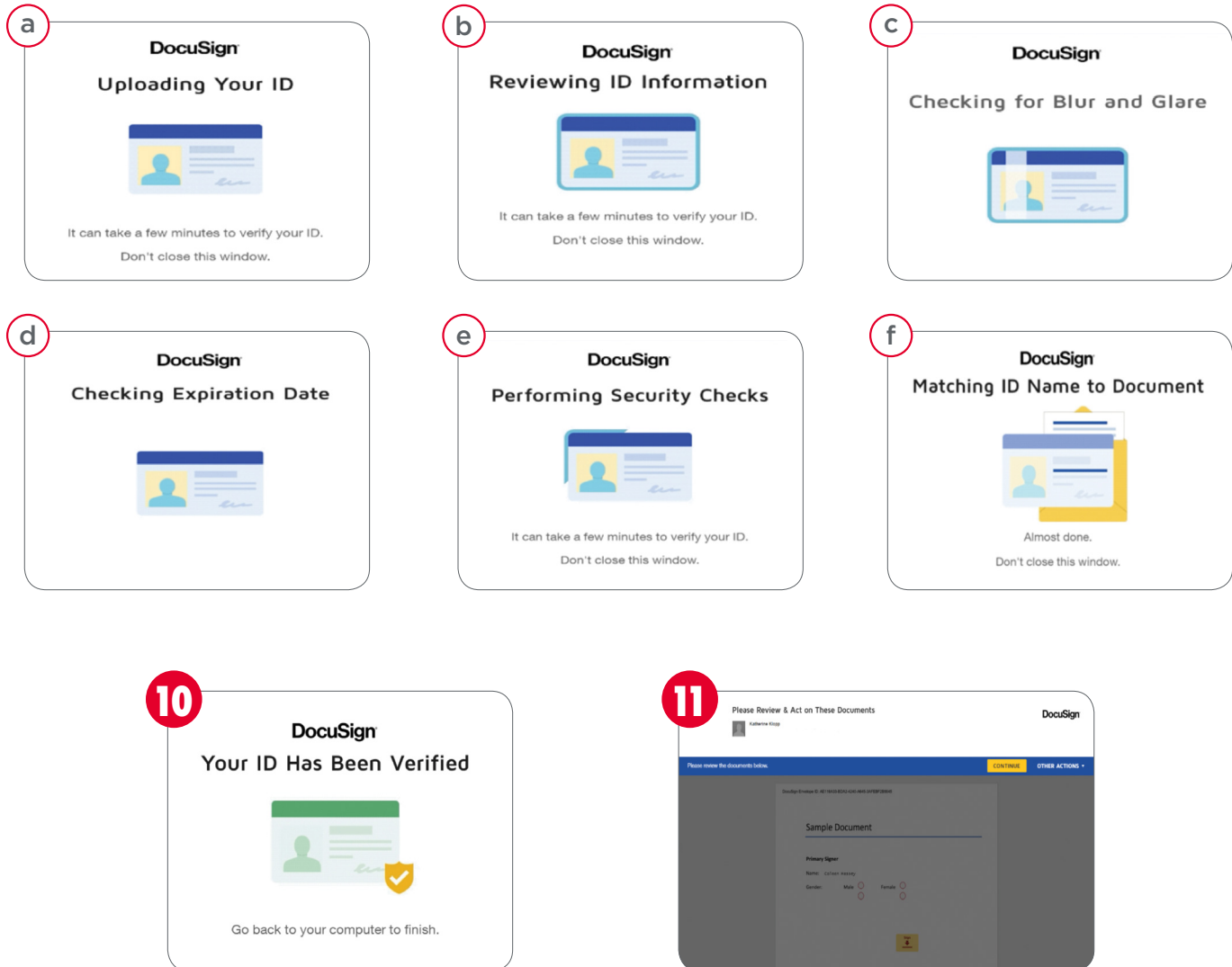
8

8. Once your ID is captured, it shows on your mobile phone. If needed, click "RETAKE PHOTO" to capture your ID document again.

9. Click "SUBMIT" to upload your image and launch the verification process. As your image is processed, the ID capture experience displays the following screens:

a

DocuSign
Uploading Your ID

It can take a few minutes to verify your ID.
Don't close this window.

b

DocuSign
Reviewing ID Information

It can take a few minutes to verify your ID.
Don't close this window.

c

DocuSign
Checking for Blur and Glare

d

DocuSign
Checking Expiration Date

e

DocuSign
Performing Security Checks

It can take a few minutes to verify your ID.
Don't close this window.

f

DocuSign
Matching ID Name to Document

Almost done.
Don't close this window.

10

DocuSign
Your ID Has Been Verified

Go back to your computer to finish.

11

Please Review & Act on These Documents   DocuSign
Katherine Kropp

Please review the documents below.   CONTINUE   OTHER ACTIONS ▾
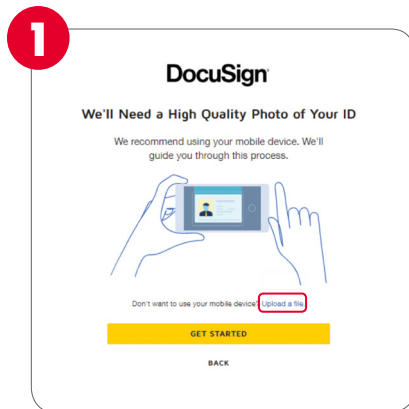
Sample Document

Primary Signer

10. If the verification process is successful, then the following screen displays.

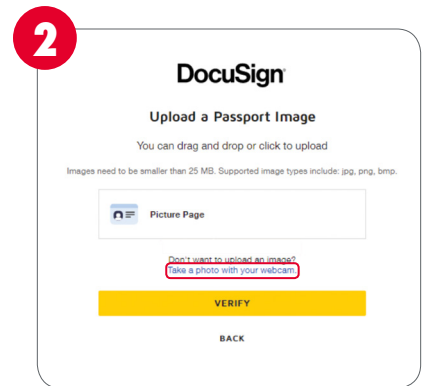**11.** Once your identity is verified, the documents you were sent to sign will open for you to review and sign.

Important: *Laptop webcams are commonly low resolution, and that is the reason why DocuSign highly recommends that you verify your ID either by uploading an existing image of your ID on your computer or using a mobile device.*

1

1. In the "We'll Need a High-Quality Photo of Your ID" screen, click the "Upload a file" hyperlink.

2. In the Upload screen, click "Picture Page" to select the image of your ID and click "VERIFY" to launch the verification process.

Alternatively, click the "Take a photo with your webcam" link to scan your ID document using the webcam of your computer.
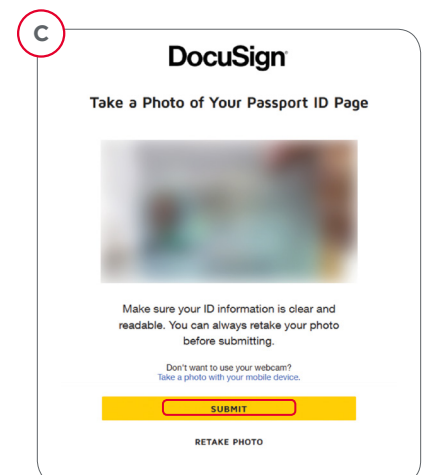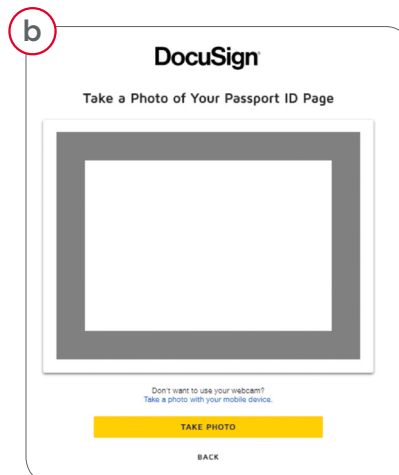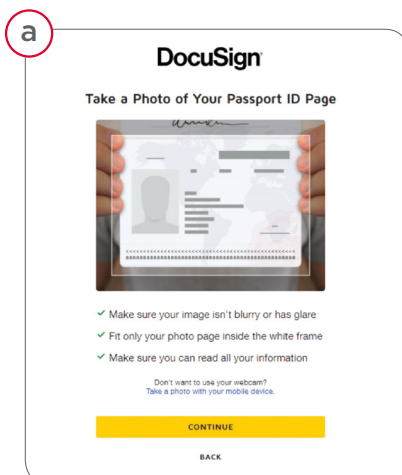
2

3. If you selected, Take a photo with your webcam:

a. Click "CONTINUE" in order to launch your webcam.

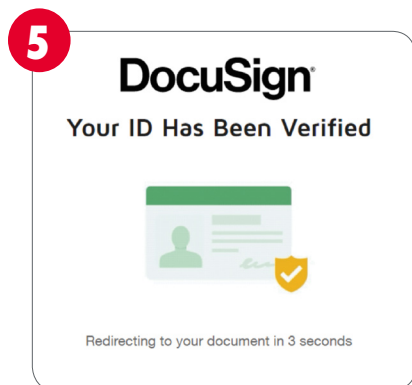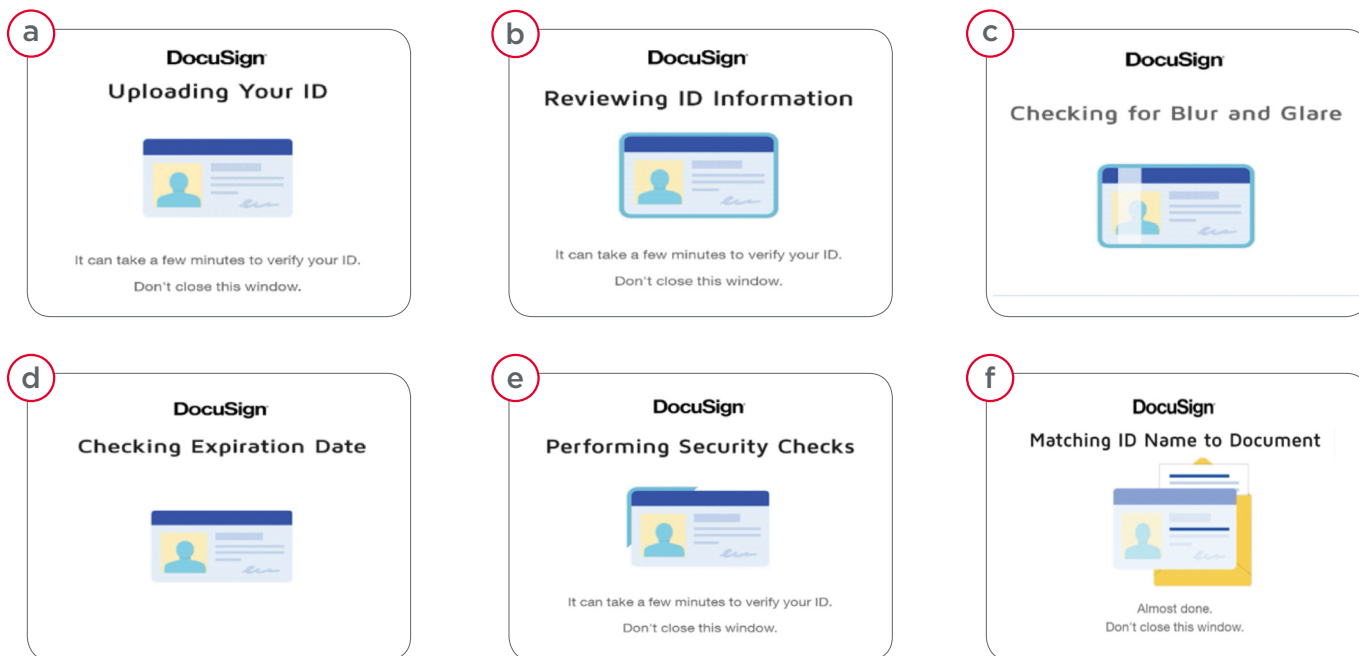**b.** Click "TAKE PHOTO" in the "Take a Photo screen" to capture your ID document. The specifics will vary depending on the identification type you are using. For example, a passport requires only the picture page, whereas a U.S. driver's license requires both the front and back of the license. For more information, see How to take a photo of your ID?

c. Review your photo, then click "SUBMIT" to upload your image and launch the verification process. If needed, click "RETAKE PHOTO" to capture your ID document again.
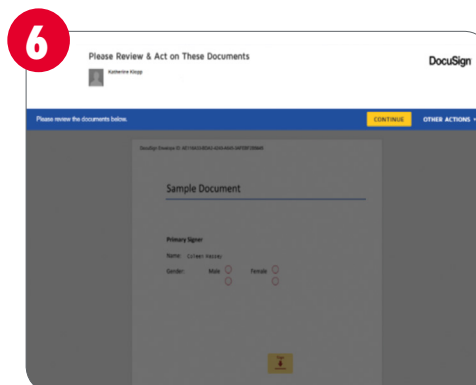
a

b

c

4. Click As your image is processed, the ID capture experience displays the following:

a

DocuSign
Uploading Your ID

It can take a few minutes to verify your ID.
Don't close this window.

b

DocuSign
Reviewing ID Information

It can take a few minutes to verify your ID.
Don't close this window.

c

DocuSign
Checking for Blur and Glare

d

DocuSign
Checking Expiration Date

e

DocuSign
Performing Security Checks

It can take a few minutes to verify your ID.
Don't close this window.

f

DocuSign
Matching ID Name to Document

Almost done.
Don't close this window.

5

DocuSign
Your ID Has Been Verified

Redirecting to your document in 3 seconds

6

Please Review & Act on These Documents   DocuSign
Katherine Klugg

Please review the documents below.   CONTINUE   OTHER ACTIONS

Sample Document

Primary Signer
Name:
Gender: Male   Female

5. If the verification process is successful, then the following screen displays.

6. Once your identity is verified, the documents you were sent to sign will open for you to review and sign.

HOW TO TAKE A PHOTO OF YOUR ID?

When capturing or uploading your ID to verify your identity, you must ensure that:

- there is no glare or blur in the captured images of your ID
- the ID takes most of the frame (consider using the landscape orientation)
- the background has a uniform color
- the ID capture shows the entire ID document with all borders and corners

HOW DOES DOCUSIGN VERIFY MY IDENTITY?

After verifying the ID of the signer, DocuSign completes by checking that the name captured by ID Verification matches up with the recipient name the sender entered in the envelope.

WHAT IF DOCUSIGN CANNOT VERIFY MY IDENTITY?

Various reasons can explain verification failure. For example, if you provide a driver's license instead of a passport or if the ID is expired, DocuSign ends the verification. Sometimes, the issue comes from the signer's name on the envelope that does not match the name on the ID. In this case, DocuSign allows senders to manually review IDs. If the sender accepts the ID, DocuSign notifies you that you can complete the envelope workflow.