

Secured Signing Certification

What signer and Notary need for RON session

Document best practices:

- Keep the information that needs to be provided DURING the signing session to a minimum, ie: all document blanks except for signatures, initials, dates should be filled in prior to uploading the document to the Secured Signing platform.
- Have the final version of the documents ready at least 24 hour prior to the start of the session to allow time for tagging and setting up the RON session.
- Try not to combine documents into one file, this affects the signing process (ie: all pages will have to be signed together).
- allowed file types: pdf .doc .docx .odt .rtf . xls .xlsx .ods
- Please, do not try to upload password protected or locked files, the system will not be able to decipher them
- File Size: We support various file sizes but a 50MB file limit per document is the default.
- For session with multiple documents, split them into 10 document packages per session, this will allow more flexibility in tagging and signing.
- Notarized Documents available for 7 consecutive days from date of signing

Device requirements:

- Computer: Desktop or Laptop Computer with webcam and microphone are preferable, signers can join from a smart phone or tablet but will experience the platform differently.
- Browser: Chrome, Firefox & Safari (on iOS) are supported but stick to your favorite browser and familiarize yourself with how to allow access to webcam, microphone, screen sharing, screen recording & pop-ups.
- WiFi - Consistent, Reliable and Fast enough to allow video streaming (Broadband preferred)
- Smart phone capable of sending/receiving SMS texts and emails. Smart phone capable of photographing an ID and uploading it to the portal through a browser
- Test your system ahead of time [here](https://networktest.twilio.com/): <https://networktest.twilio.com/>

Notary should ALWAYS be on a desktop/laptop

Signers can join from mobile devices

Mobile device users will not share their screen during signing.

For meeting attendees

- Every signer should have their own email address.
- FireWall/VPN: If you have a Firewall or using a VPN, please make sure you can access our servers.
- Computer/Camera/Webcam: You can use Chrome/Firefox or Safari (on iOS), please make sure the browser allows camera/webcam/screen sharing/screen recording/pop-ups. For a much simpler experience, all browser tabs should be closed except for Email prior to starting the session.
- Equipment Test: Please test your equipment at least 3 hours prior to your session. <https://networktest.twilio.com/>

Familiarize yourself with the process by watching these videos 3 hours prior to your session

- The signer experience: <https://vimeo.com/539378970>
- How to do Knowledge Based Authentication and Credential Verification. <https://vimeo.com/512301637>

Knowledge Based Authentication (KBA) requirements

- Signer(s) must be a US Person over 18 years of age with a valid social security number and a US work/financial/residential history of at least 5 years.
- KBA quiz starts with the invitee entering their identification information, this includes their legal name, address for the last 90 days and last four digits of their social security number
- Signer(s) must pass Knowledge Based Authentication Quiz and answer 4 out of 5 questions correctly within **2 minute**.
- Signer(s) can attempt the KBA Quiz only twice within a **24 hour** time frame.
- If the signer fails to answer correctly both times, the session can only be rescheduled after waiting a minimum of 24 hours.

ID Verification

- Signer must have a valid Government issued photo ID such as Driver License (DL), Passport or Passport Card.
- Signer must have a Mobile Phone Number with a connection to the internet.

Tips:

Make sure you have adequate lighting, doing the process next to a window or even outside makes it easier.

Put your ID against a dark background.

Follow the instructions on the screen and keep a steady hand for better pictures.