ESIGNATURE WORKFLOW SUMMARY





Start

- Email link
- Website URI
- Kiosk application
- API call

Authenticate **Participant**

- Email invitation
- · Single use PIN
- Username/password
- Knowledge-based authentication (KBA)
- · Digital certificate (PKI)
- Single sign-on (SSO)

Collect Information

- Checkhox
 - Checkhox list
 - Date picker
- Drop down list · Email address
 - Hidden field
 - Name

 - Organization
 - · Phone number Radio button list

 - · Social security number
 - Text area
 - Text box
 - Title
 - Mandatory & optional

Standard Actions

- Process explanation
- U.S. federal consumer disclosure Disclosure or
- document review
- Upload documents (e.g. copy of drivers license)
- Mandatory & optional

Custom Actions

- 3rd party application integration
- 3rd party data collection
 Click to sign
- · Dvnamic document management
- · Dynamic participant management
- Dvnamic task management
- Specialized authentication
- Mandatory & optional

Present & Sign

- · Sequential or nonsequential signing
- Click to initial.
- · Click to acknowledge
- · Signature annotation
- · Registered signature · Handwritten signature
- · Mobile signature
- · Hardware signature pad
- API call
- · Completed documents & audit trail securely stored in document database

Document Delivery

- Secure download
- Email attachment
- · Delivery of other documents (e.g. emplovee manual. product information)

Finish

- · Standard exit page
- Custom URI
- Return to 3rd party application