Tech Tip #16: Sending documents to multiple signers sharing the same email address?

John & Jane Docland
jdocland@doclandevents.com

You're sending a loan package out for esign to John and Jane Docland that they both need to sign, but they share the same email address. How do you insure that the intended signer signed the document? Below are ways to approach this situation.

1. Signer Best Practices

To protect identity during the signing process, we recommend one signer per email address. When that is not possible, to accommodate signers that share an email address, we recommend the following Best Practices.

On the eDOCSignature *Select Signers* screen:

- Assign the first signer to Group 1.
- Assign the second signer to Group 2.
- Call each signer separately to deliver their authorization codes.

This process will send the eSign notice to the first signer, and once the first signer has signed, a notice will be sent to the second signer.

2. Require an ID check

If you check *ID Check* (optional service) on the *Select Signers* screen, each signer will be presented with questions that are easy for them to recall but obscure enough that others would not be able to answer. These questions are generated automatically and are specific to the user from data already collected in databases such as the users' financial transactions, vehicle registrations, and other records. By asking a series of relevant, multiple-choice questions, you can confidently confirm that John Docland really is John Docland.

3. Enable setting in ProDOC

The following setting in ProDOC will allow you to use the same email for two signers. This change can be made on one or all workstations at the credit union via the Upgrade folder.

In the ProDOC.ini:

[Setup]

EsignAllowDupEmail=Y

If you need assistance enabling this feature, please contact support at 800-425-7766 Option 2 or complete our online support request here.