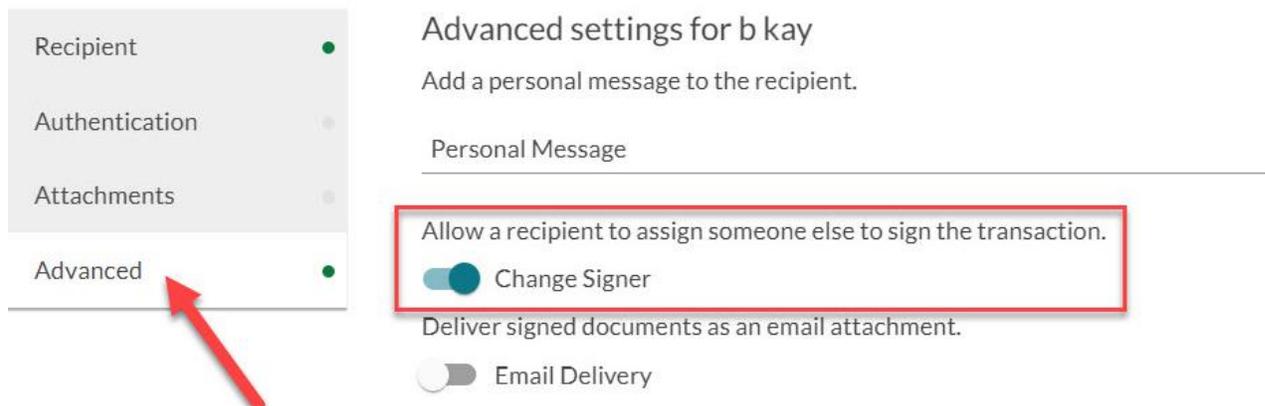


Reassigning Recipients in a OneSpan Transaction

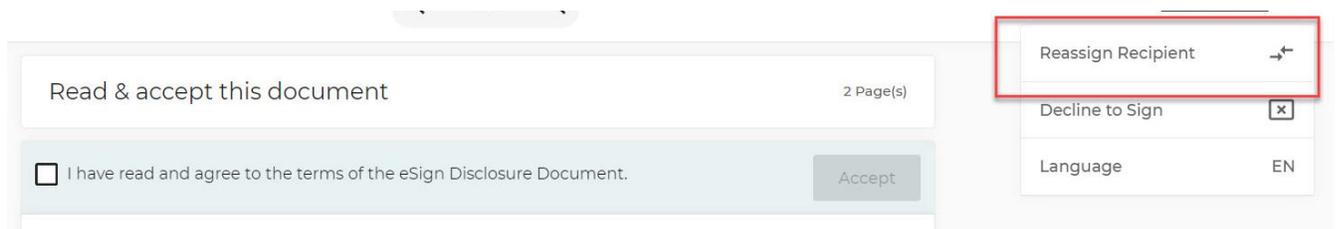
When setting up a transaction, a recipient can be given the ability to assign a different signer to the document. To do this, the sender/initiator can modify the Recipient Settings when creating the transaction. Select the ellipse next to the recipient name.



Select the Advanced settings and toggle the Change Signer option.



The original recipient will receive the email message inviting them to sign the document. When they open the document(s) to review, **they should not accept the consent agreement, because this will prevent the recipient from reassigning the documents to someone else.** Instead, they should click the More Actions drop-down in the upper right-hand corner of the screen, and then select Reassign Recipient.



The Reassign Recipient form will open. The original recipient will need to provide the first name, last name, and email address of the new recipient. They are also encouraged to provide a

REASSIGN RECIPIENT X

Reassigning a recipient will make the person defined below the new recipient, instead of you. A notification will be sent to the new recipient and to the sender of this transaction. You will also receive a copy of the final signed documents.

New recipient details

First Name (Required)

Last Name (Required)

Email (Required)

Title

Company

Personal Message

personal message to the new recipient that explains why they are receiving the document(s) to sign. Then, they need to click the next button.

Next, the original recipient will be asked to select an authentication method for verifying the new recipient's identity. If email is selected, the new recipient will receive an email message with a link that can be used to open and sign the document. This is the default setting. If Q&A is selected, provide questions and answers that the new recipient can be quizzed on to verify their identity. If SMS is selected, the new recipient's cell phone number must be provided so the portal can send the new recipient a text message to verify their identity. After the authentication method is selected, click the Reassign button.

REASSIGN RECIPIENT X

Authentication method

Please select an authentication method for verifying the recipient's identity.

Email

Q&A

SMS

The identity of the recipient is verified using their secure name and password when logging into their email account.

Note: if the new recipient is not the appropriate signer, the new recipient has two options:

1. The new recipient can decline to sign the document.
2. The new recipient can reassign it to the correct person following the instructions above.

When the transaction is complete, the Evidence Summary will show that a reassignment occurred.