Getting Started with the ZipID App
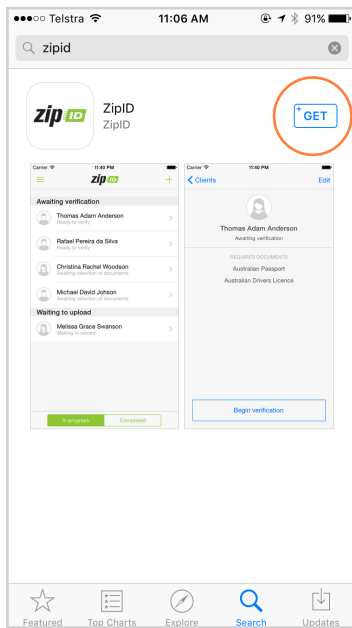
zipID
From Equifax

What is the ZipID App?

The ZipID App allows you to professionally and securely verify your client's identity. The App takes you through the process start to finish, and you end up with a secure compliant report in your inbox.

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1 **DOWNLOADING THE APP**

The ZipID App is free to download from the App Store.

Search for ZipID on the App Store and tap the **Get** button to download it to your iPhone or iPad.
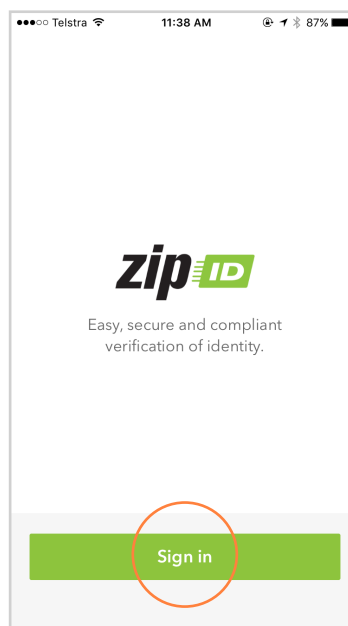
REQUIREMENTS

✔ Your device must be running iOS 8 or higher to use or download the App.

✔ To access the App, you will need to be registered with ZipID. If you have not registered with ZipID, visit **zipid.com.au/signup** or contact **support@zipid.com.au**.
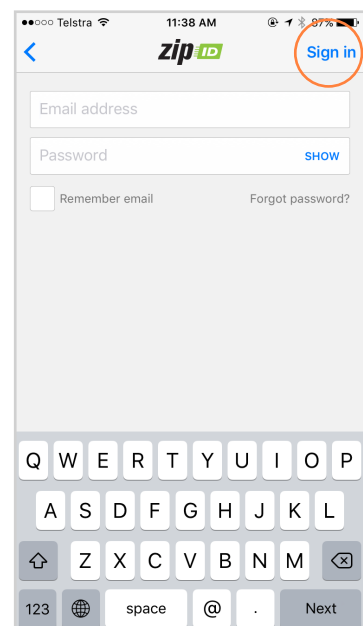
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2 **SIGNING IN**

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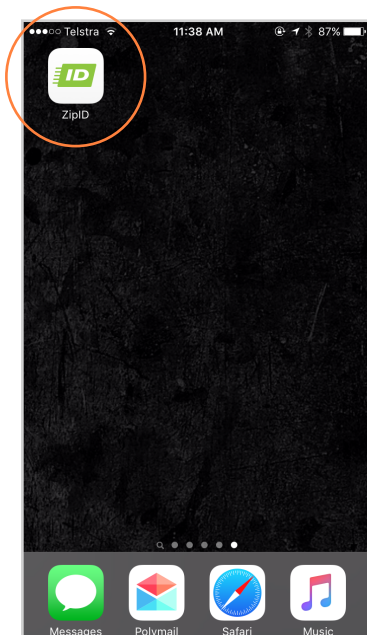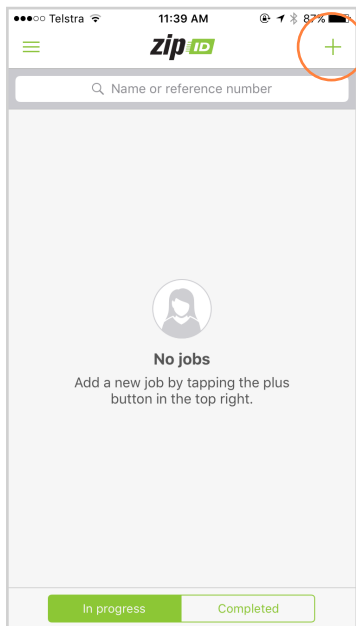
Tap the **ZipID App Icon** on your device.
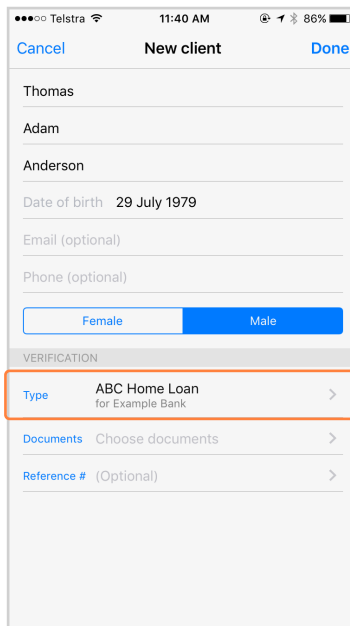
Tap on the green **Sign in** button.

Enter your email address and password then tap **Sign in**.

NOTE: ✔ Your device will need to be connected to the internet to sign into the App.
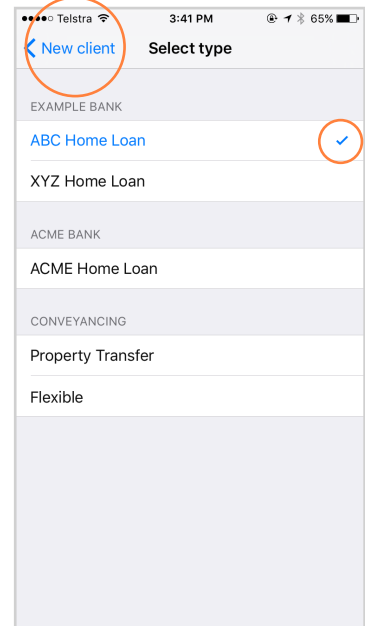
3 CREATING A CLIENT
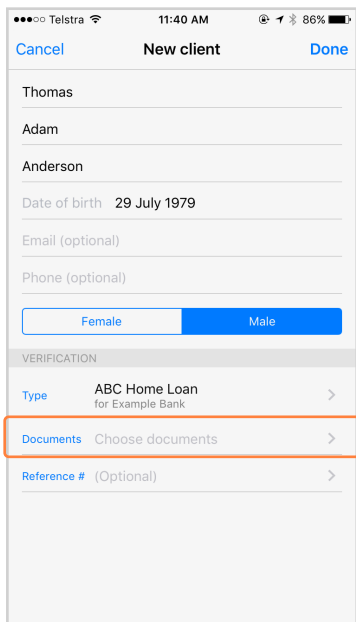
Tap the **green plus button** to create a new client.

Enter your client's full name, date of birth and gender.

Tap on the **Verification Type** to choose the appropriate standard or product option for your client.
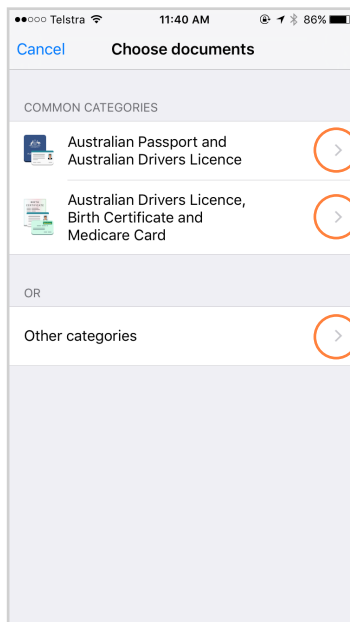
The list of available verification types is configured for your account.

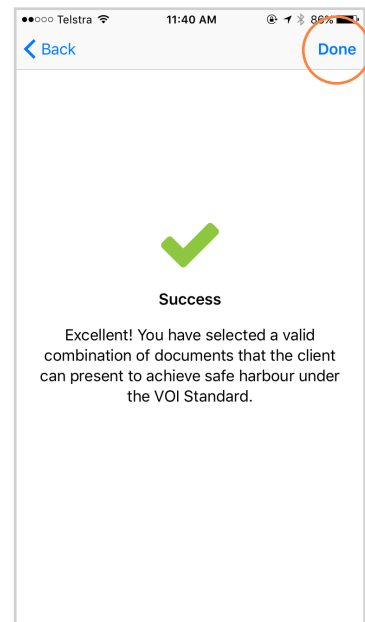Select the appropriate option and then tap **< New client**.

Tap **Choose documents** which will bring up the IDWizard to guide you through selecting a compliant set of ID documents.

Follow the steps in the IDWizard to ensure your client has a compliant set of ID documents.
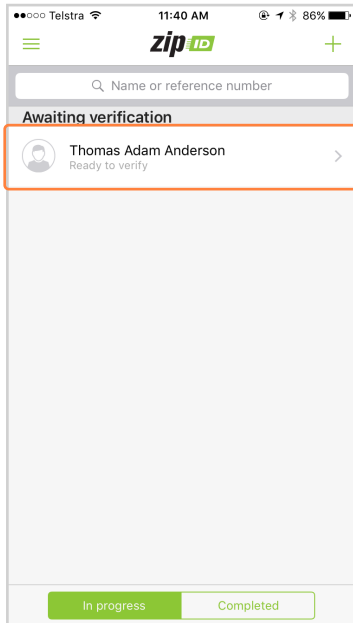
Shortcuts to the most common combinations are provided on the first screen.
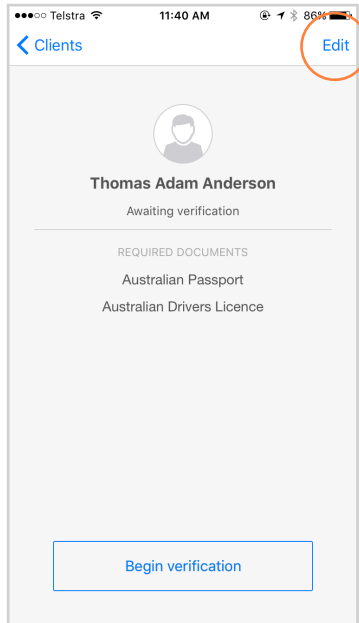
Once you have a valid set of documents tap **Done**.

This will take you back to the Client screen where you can now tap **Done** to save the client.

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4 EDITING A CLIENT'S DETAILS

To edit any of the details you entered tap on the **client's name**.

On the next screen tap **Edit**.

This will allow you to change the client's full name, date of birth, gender or selected documents.

SAVE FOR LATER

✔ If you cannot complete the verification at that time, you can exit the App and your client's details will remain for completion at a later stage.

This is useful if you would like to pre-enter client details to reduce the interview time.

5 COMPLETING THE VERIFICATION
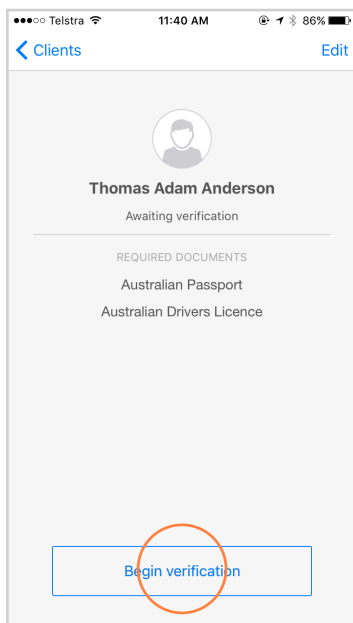
Once you are ready to begin the verification, tap on the client. On the next screen tap **Begin verification**.
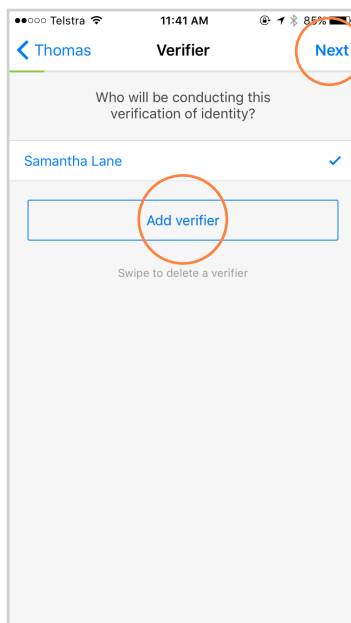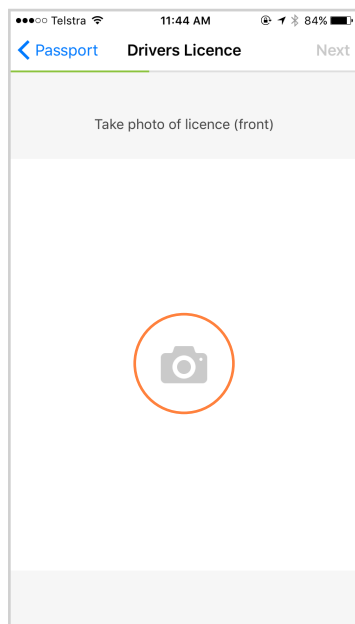
Select your name from the list of verifiers and tap **Next** to continue.

If your name doesn't appear in the list simply add yourself by tapping **Add verifier**.
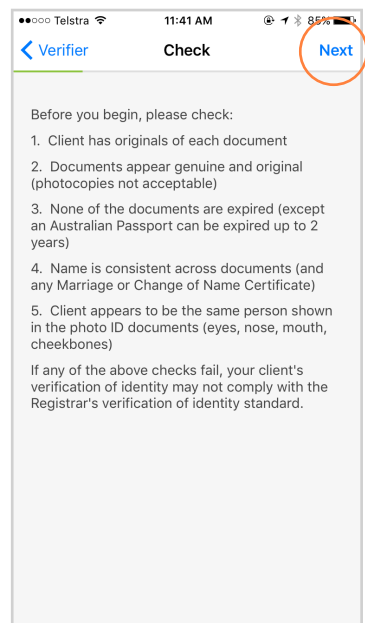
Follow the steps in our best practice 5 point check to ensure the ID documents presented are valid.

If everything appears to be valid tap **Next** to continue.
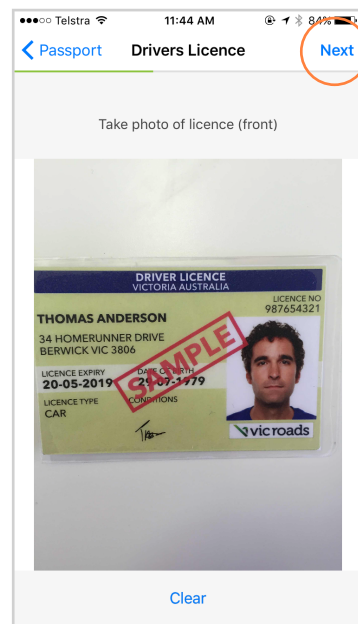
5. Completing the verification continued

The App will now guide you through imaging each of the documents you selected when you created your client.

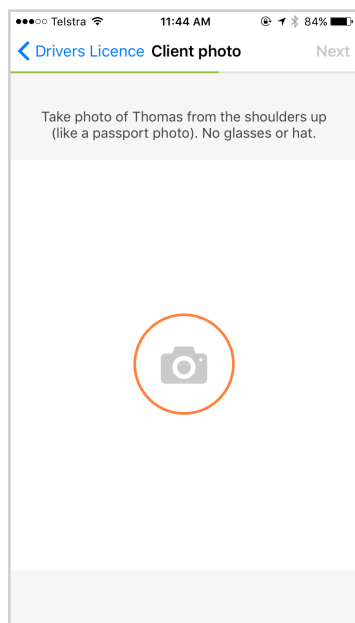Tap on the **camera icon** to activate the camera.

Take the photo and then closely review the photo. If all details are legible then tap **Use Photo**.

Otherwise, tap **Retake** to try again.

Remember clear images are important evidence included in your report.

Tap **Next** until you have taken images of all of the required ID documents.
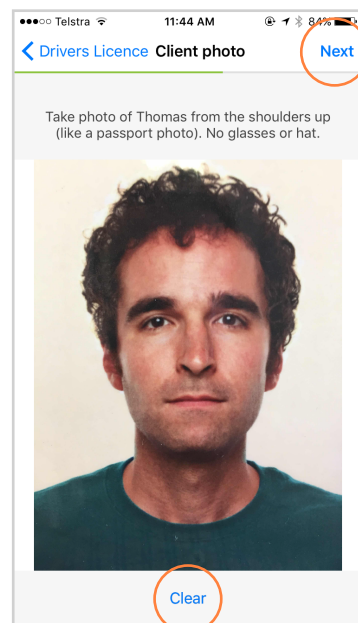

As part of the Report you need to include a photo of your client.

Tap on the **camera icon** to activate the camera.

Take the photo of your client and then review the image. If the image is acceptable then tap **Use Photo**.

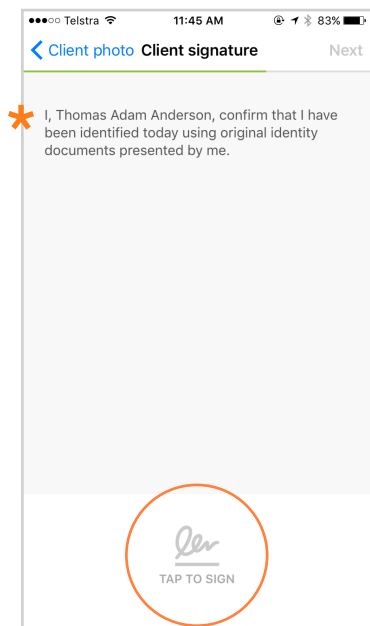Otherwise, tap **Retake** to try again.

You can tap **Clear** at the bottom of the screen if you need to retake the photo.
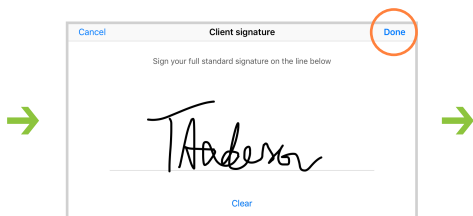
Otherwise, tap **Next** to continue.

NOTE: ✔ The client photo should be framed like a passport photo. Ensure the client isn't wearing glasses or a hat.

5. Completing the verification continued

Pass the device to your client. Ask your client to **read** the statement on the device then tap on **Tap to Sign**.
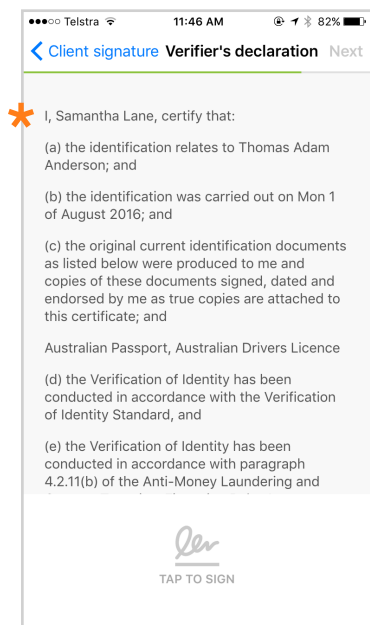
(Note that this statement may differ based on the type of verification you are conducting)

Ask the client to **sign on the screen** using their finger or a stylus. If the client needs to repeat, tap **clear** at the bottom of the screen.

Once completed, tap **Done**.

Tap **Next** to continue.

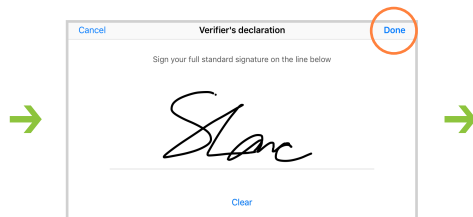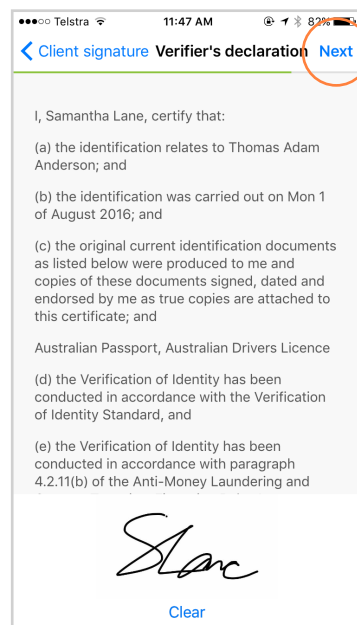*Note: if using the App on a phone the screen will rotate to landscape when signing.*
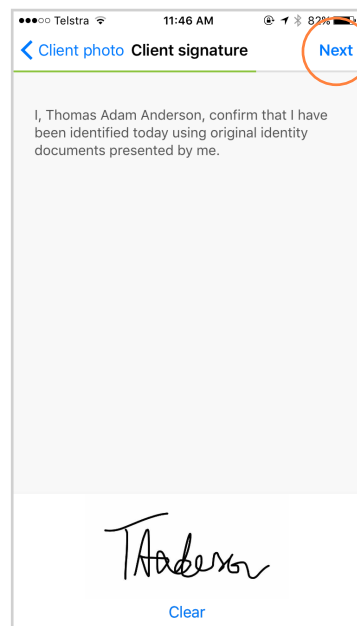
Read the declaration which confirms that you have conducted this verification according to the required standards and/or policies.

If you agree, tap on **Tap to Sign**.

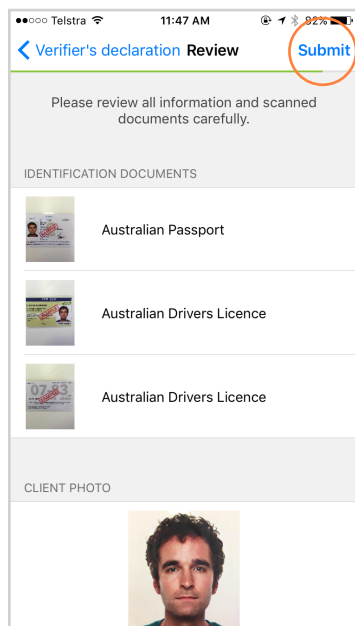(Note that this declaration may differ based on the type of verification you are conducting)

Sign on the screen using your finger or a stylus. If you need to repeat, tap **clear** at the bottom of the screen.

Once completed, tap **Done**.

Tap **Next** to continue.

Note: if using the App on a phone the screen will rotate to landscape when signing.
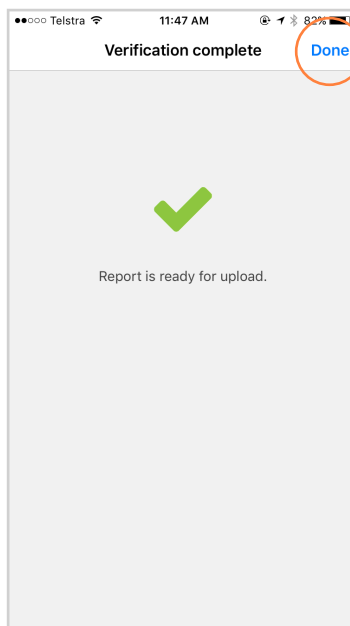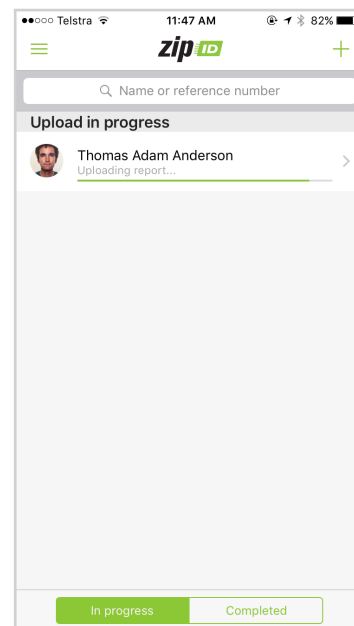
5. Completing the verification continued

Review all of the document images, the client photo and the signatures.

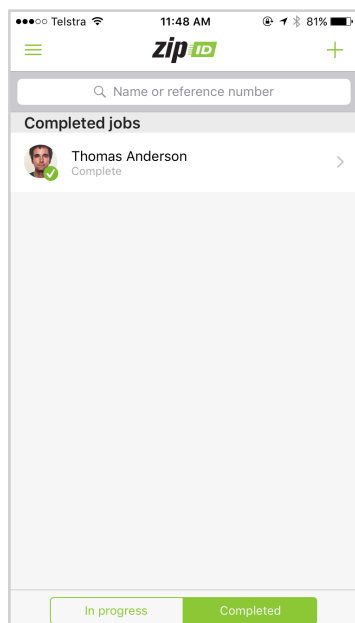Scroll down using your finger to see all the images if necessary.

Tap **Submit**.

After a couple of seconds the report will be ready to upload securely to the ZipID Portal. Tap **Done** to continue.

The report will upload automatically if your device currently has an internet connection. A green progress bar appears below the client's name.

Once the report has finished uploading the client will be marked as Complete.

WHAT IF MY DEVICE IS NOT CONNECTED TO INTERNET?

✔ If your device doesn't have an internet connection when you finish the process the report will be marked as **waiting for upload**.

Once your device is online again tap on the **client's name** and then tap **Upload report**.

DATA SECURITY

✔ The ZipID app is designed to securely perform interviews and collect ID data.

ID data is securely encrypted and permanently removed from the device after the report has been uploaded.

6 ACCESSING THE REPORT

ZipID will email a secure link to access the report.

Tap **Download report** to go to the ZipID Portal.

You will need to login with your email address and password to access the report.

The downloaded PDF report includes:

- Client details
- Photo of the client
- Photos of each ID document
- Signed verifier's declaration
- Signed client consent

✔ If you have any questions, require assistance or would like to suggest an improvement, please email **support@zipid.com.au**.