State Agency Onboarding Guide

Kickoff Call
- ❏ ID.me to schedule a kickoff call with the following stakeholders:
    - ❏ State Team: Executive Sponsor, Project Owners and Managers, Unemployment Leaders, Security, Communications Team, Technical Integration Leads
    - ❏ ID.me Team:
        - ❏ Business POC: Mere Work mere.work@id.me
        - ❏ Technical POC: Andy Leonard andy.leonard@id.me
        - ❏ Customer Success Manager: Geoff Daily geoff.daily@id.me
        - ❏ Customer Success Manager: Paul Graham paul.graham@id.me
- ❏ The purpose of the kickoff call is to:
    - ❏ Introduce the teams
    - ❏ Finalize technical integration for go-live
    - ❏ Cover ID.me's communications best practices (high level)
        - ❏ Set up additional communications meeting
    - ❏ Implement ID.me's security best practices
    - ❏ Share ID.me's reporting format
        - ❏ *After go-live, ID.me CSM will provided dedicated reporting meeting to go over the reports*
    - ❏ Define core team and establish:
        - ❏ Daily check-ins for expedited timeline
        - ❏ Weekly check-ins post go-live

Integration & Technical Components
- ❏ ID.me's Solutions Integration Engineer to be the main point of contact for all integration and technical questions
    - ❏ Andy Leonard andy.leonard@id.me
- ❏ ID.me's **Employment Benefits Integration & Workflow** guide outlines the steps required for integration
- ❏ ID.me and the State to determine a timeline for upgrading to the direct integration solution within 90 days of go-live, if applicable
- ❏ **Redacted** example + File format

ID.Me [id.me] Redacted (Redacted format)

Item	Description	Attribute	Length	Comment
1	email	Redacted	Redacted	Redacted
2	Redacted	Redacted	Redacted	Redacted
3	first_name	Redacted	Redacted	Redacted
4	last_name	Redacted	Redacted	Redacted
5	dob	Redacted	Redacted	Redacted
6	ssn	Redacted	Redacted	Redacted
7	address	Redacted	Redacted	Redacted
8	city	Redacted	Redacted	Redacted
9	state	Redacted	Redacted	Redacted
10	zip	Redacted	Redacted	Redacted

11	phone	Redacted	Redacted	Redacted
12	created_at	Redacted	Redacted	Redacted

Communications + Call Center

- ❏ ID.me creates the HLP and populates the page with example copy
  - ❏ State provides copy edits (review during final QA screenshare)
  - ❏ State sends specific image for HLP: **The banner image is 1300px X 450px. The logo is 60px X 60px**
- ❏ State drafts the email directing claimants to the ID.me HLP
  - ❏ ID.me reviews the email and shares it with ID.me's member support team.
  - ❏ Any additional correspondence being sent to claimants (e.g. second email or letter)?
- ❏ State and ID.me pre-determine email cadence for the first two weeks following go-live.
- ❏ ID.me creates an FAQ page on help.id.me with state inputs
- ❏ State determines is press release will be made (ID.me can share examples)
  - ❏ State and ID.me determine action for press request for comment (POC)
- ❏ ID.me to share a user guide, FAQ guide, and other artifacts
- ❏ ID.me to provide information to aid call center in directing people to ID.me for account help

Security & Business Recommendations

- ❏ ID.me and the State to establish processes for flagging high risk credentials and escalating fraudulent activity to law enforcement (ID.me is already working directly with the FBI, as well)
  - ❏ POC
  - ❏ **Redacted**
- ❏ ID.me requires the following best practices to deter fraudulent activity:
  - ❏ Match claimant DOB, SSN, first, and last name at a minimum submitted to ID.me with the claimant info submitted to the state when filing
  - ❏ Set a one week buffer period after ID.me verification prior to claims payment (if able)

Data & Reporting

- ❏ The CSM to be the point of contact for all data and reporting needs
  - ❏ For the first 2 weeks, ID.me to provide a daily report
  - ❏ After the first 2 weeks, ID.me to provide a weekly report
- ❏ In addition to weekly reporting, ID.me to share a comprehensive monthly report + monthly invoice with types of credential
- ❏ In the case that the State must report to leadership on findings, the ID.me team can compile data points to assist the State