

From: [FRIESEN Lori L * OED](#)
To: [HEPP Martin * OED](#); [KAILUWEIT Jan * OED](#); [ANDERSON Connor * OED](#)
Subject: FW: ID.me questions for costs
Date: Wednesday, January 6, 2021 10:32:00 AM

FYI: keeping you in the loop and updated 😊

From: FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>
Sent: Wednesday, January 6, 2021 10:31 AM
To: LEAHY Lindsi K * OED <Lindsi.K.LEAHY@oregon.gov>
Cc: CROMWELL Sara D * OED <Sara.D.CROMWELL@oregon.gov>; FLORES Sarah R * OED <Sarah.R.FLORES@oregon.gov>; TRUEX Bill L * OED <Bill.L.Trueux@oregon.gov>; VILLANI David * OED <David.VILLANI@oregon.gov>; HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>; FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>
Subject: ID.me questions for costs

Hi Lindsi,

Below are answers to some questions that were raised at our ID.me Check-in yesterday after some back-n-forth w/ID.me. Please note the pricing differences below for prepaid credential verifications vs pay as we need are [REDACTED] per credential. And this is before SHI's markup.

Here are some big questions we need answered to get a better ideas of costs:

- how many credentials do we want to pre-purchase?
 - o What credentials and how? All new claims? All claims in BPC? Just PUA and MEUC? Do we just have ID.me validate the claimants we flag in BPC we're concerned with?
- Merr mention's below that they're minimal contract is 24 months. I believe we discussed a 12 month. Is this something we want to push back on?

Your thoughts?

Lori

From: Mere Work <mere.work@id.me>
Sent: Wednesday, January 6, 2021 7:58 AM
To: VILLANI David * OED <David.VILLANI@oregon.gov>
Cc: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>; FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>; Geoff Dailey <geoff.dailey@id.me>
Subject: Re: Quote for OED

Hi Dave-

No problem--see my answers below. **Since you are utilizing NASPO SVAR, I'm sure you know that there will be a slight markup to the amount I am using below--just wanted to make sure you realized this is our base price--there is a markup through the reseller.

Based on what we've seen from states of a similar population size to Oregon, we've seen a range of pre-purchase of 20,000 credentials up to 100,000 credentials, with an average of

60,000 credentials. Of our 14 live states, half have had to purchase additional credentials due to massive volume in the last 4 months. We understand that the amount is dependent on budget, uncertainty, risk (from the state perspective) and a variety of factors. Prior to answering your questions, I will offer three additional points:

- A lot of our state partners have had success utilizing COVID emergency funding for identity verification/fraud prevention. I'm not sure if that is an option for OED, but wanted to mention it.
- Many states have started small, with a pilot and a smaller PO--after a few months and getting comfortable/seeing the demand/need/functionality of the product, they have issued a larger PO and done a direct integration (Arizona, Indiana, FL; PA and GA in process)
- One very small state was able to successfully leverage an additional enterprise-wide identity project at the state to increase the budget/amount pre-purchased for the specific project.

Credentials:

○ Do we pay for the credentials up front or as they are used? **You can do either; however, the pay-as-you-go fee starts at [REDACTED] per credential. The pay upfront allows you to lock in the current tier price [REDACTED]. For the record, we do not have a single state partner that has opted for pay-as-you-go.**

▪ If we pay upfront, at the end of the contract term, would OED get paid for the remainder of unused credentials? **No; honestly this has not occurred for any of our federal or state clients to date. The license terms are 24 mo (and I can adjust to 36 months if you are interested in a larger up front purchase).**

▪ If we pay upfront, is there any process or requirement for OED to request money paid for the unused credentials? **No; see previous answer.**

▪ If we pay as we use them, do we pay for unused credentials? **No; you would pay [REDACTED] for each verified credential**

○ Are we able to purchase more credentials if we use more than we anticipated?

▪ Is there a penalty or additional fee for adding or exceeding the number of credentials? **No; this happens all the time.**

• General:

○ Because we are purchasing through SHI, would SHI or ID.me send monthly invoices with the amount spent? **ID.me can send SHI invoices--SHI send them to you. OED will also get verification results daily for 2 weeks and then weekly after.**

▪ In the bit of reading I got in before the end of the day yesterday it looks like ID.me will be sending monthly invoices. (yes)

- That being the case I assume we would also get something from SHI.
- So a better question is, would ID.me send an invoice to both OED and SHI?

Please let me know if anything else comes up!

Thank you,

Mere Work

Senior Account Executive

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McLean, VA, 22102

mere.work@id.me



On Wed, Jan 6, 2021 at 10:31 AM VILLANI David * OED <David.VILLANI@oregon.gov> wrote:

Good morning Mere,

We are working on the number of credentials we would like to purchase. This discussion raised a couple of questions. I will be going back through the documentation you sent to see if I can answer them, but figured I'd also ask you in hopes of getting an answer faster than me reading in-between meetings.

- Credentials:
 - Do we pay for the credentials up front or as they are used?
 - If we pay upfront, at the end of the contract term, would OED get paid for the remainder of unused credentials?
 - If we pay upfront, is there any process or requirement for OED to request money paid for the unused credentials?
 - If we pay as we use them, do we pay for unused credentials?
 - Are we able to purchase more credentials if we use more than we anticipated?
 - Is there a penalty or additional fee for adding or exceeding the number of credentials?

- General:

- Because we are purchasing through SHI, would SHI or ID.me send monthly invoices with the amount spent?

- In the bit of reading I got in before the end of the day yesterday it looks like ID.me will be sending monthly invoices.
 - That being the case I assume we would also get something from SHI.
 - So a better question is, would ID.me send an invoice to both OED and SHI?

Thanks in advance

Dave Villani

From: Mere Work <mere.work@id.me>

Sent: Tuesday, January 5, 2021 7:59 AM

To: VILLANI David * OED <David.VILLANI@oregon.gov>

Cc: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>; FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>; Geoff Dailey <geoff.dailey@id.me>

Subject: Re: Quote for OED

Hi Dave-

Yes, X=confirmed successful credentials. The memo I sent you all a few weeks back lays out our licensing in-depth; the credentials are valid for 24 months from go-live (sometimes PO happens a significant amount of time before go-live), and there is no monthly minimum.

For example, if OED pre-purchases 200,000 licenses and goes live in Feb 2021, and then uses 150,000 over the year, the remaining 50,000 would be available until Feb 2023.

Thank you,

Mere Work

Senior Account Executive

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On Tue, Jan 5, 2021 at 9:57 AM VILLANI David * OED <David.VILLANI@oregon.gov> wrote:

Thanks for the quick response Mere.

I interpret "X number of credentials" as confirmed ID's, is that correct? Also when we are determining how many to purchase, are we looking at a specific time frame like X per month?

Dave

From: Mere Work <mere.work@id.me>

Sent: Monday, January 4, 2021 4:42 PM

To: VILLANI David * OED <David.VILLANI@oregon.gov>

Cc: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>; FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>; Geoff Dailey <geoff.dailey@id.me>

Subject: Re: Quote for OED

Hi Dave!

Happy New Year to you and the OED team! We're excited to kick off 2021 with this project with you all. In order to accurately give SHI a quote, I need the number of verification credentials you will be purchasing.

While we do charge 2 different fees based on if the user is a new or returning (previously verified by ID.me) user, it's difficult to ascertain what percentage of your users will be pre-verified. All of our other partners have purchased X number of credentials, and then, in addition to daily/weekly reporting, we send monthly invoices that show how the credentials have been broken down between new issuances/network renewals. Does that make sense?

For the other items:

- I've attached an example csv file and the integration guide, which contains step-by-step directions (we also go over this in-depth during an onboarding call). For the [REDACTED] the time stamp is set to UTC and the naming convention for the file is:
- **Hosted Landing Page:** The banner image is 1300px X 450px and the logo is 60px X 60px (jpg or png preferred). Here are a few examples (please do not verify through them!): [Washington](#), [Georgia](#), [Indiana](#)
- **Help.ID.me Page:** We recommend creating an OED specific help page on [Help.ID.me](#). If you can provide the copy/images in word format we can easily add the page [here](#). North Dakota has received great feedback from claimants on their page, so we do recommend that specific one. Other states have also preferred to keep it very generic and point back to their own state FAQ page.

Please let me know if you have any questions.

Thank you,

Mere Work

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On Mon, Jan 4, 2021 at 5:20 PM VILLANI David * OED

<David.VILLANI@oregon.gov> wrote:

Hi Mere, I hope you had a good couple of holiday's. The Oregon Employment Department is looking forward to working with ID.me. We would like to get our procurement process started and would like a quote provided through SHI. The quote would be for a State landing page, per match cost (new and existing ID), and a statement of work. If there is more you need to generate the quote, just let us know. I have include Nameun from procurement and Lori who will be our project manager.

I also receive some additional questions from our IT shop. What method/s does ID.me use to send us results? I believe you told us [REDACTED] but I wanted to verify. When possible, they would also like a sample file or file layout so we can start setting our systems up internally to process the file.

Thanks in advance

Dave Villani

Operations and Policy Analyst

Oregon Employment Department

(503) 947-1356

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