ID.me

10 Best Practices

For ID.me Healthcare Partners

To ensure the smoothest possible partner onboarding, go live, and rollout of the coordinated software solution, ID.me has developed this list of best practices. These best practices are data-driven and based on lessons learned from onboarding over 10% of our nation's healthcare providers via numerous healthcare partners.

1

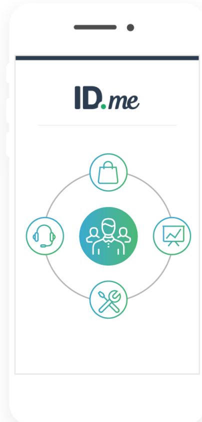
COMMUNICATE!

Above all, the key to making this partnership successful (and to sail through the other best practices) is to communicate early and often.

Your ID.me team is here to help. Please think of us as your resource to ensure that the technical integration, non-technical coordination, and ultimate go live are smooth and successful. Reach out any time to express concerns, ask questions, or make requests.

Your customer success manager (CSM) is your advocate and main point of contact at ID.me. Your integration engineer is your main technical point of contact. Keep these two people apprised of any changes so that they can make the necessary modifications to support your evolving project goals.

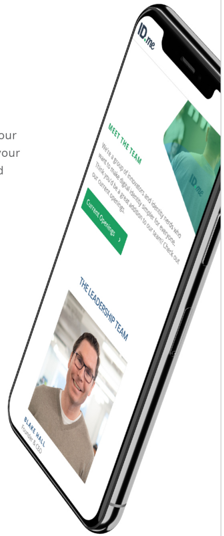
Frequent communication is also an avenue for further collaboration and achieving creative solutions. ID.me is always looking to improve our processes and product, and thus we appreciate any constructive feedback. Some of our best ideas and product enhancements have come from partner input, so please be open with our team!



2

TEAMWORK MAKES THE DREAM WORK

Hand in hand with communication is teamwork. At ID.me, we are ready to work towards your project goals. However, we will need your help to ensure that all of the internal teams on your side are aware of and aligned with the business goals, including the go-live target date and plans for launch.



Lack of appropriate internal team coordination leads to delays in product launch. **Consider including the following internal teams in the project:**

- Project Manager: The project manager will be responsible for communicating with all teams and will serve as the main point of contact between ID.me and your internal teams. They will inform ID.me and relevant internal teams of changing goals, especially shifts in deadlines.
- Engineering: Your engineers will need to work with the ID.me sales integration engineers to configure the coordinated solution and have it ready for launch by the target go-live date.
- Customer Support: Customer support will need to be aware of the partnership with ID.me and trained on the new support process and ID.me product in order to assist end-users. Prior to initial go live, you may need to dedicate additional support resources to helping end-users navigate the ID.me process depending upon expected initial volumes.
- Prescriber Training Team: Also called the implementation or onboarding team, they are responsible for communicating with the end-users. They must be aware of the go-live date and initiate communications informing end-users of the partnership with ID.me. They will also be responsible for explaining the reason for the new prescriber verification requirement.
- Decision Makers: Decision makers from all contributing parties should be involved in the solution launch process early and often. Lack of a decision maker's involvement may lead to delays. Examples include:
  - Product quality or UX/UI lead
  - Integration policy lead
  - Lead engineer
  - Marketing lead
  - Solutions architect

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EVERYTHING YOU NEED IS IN THE WELCOME KIT

The ID.me Welcome Kit is filled with battle-tested content that effectively communicates ID.me's workflow and value to specific audiences. It was developed based upon lessons learned from onboarding over 100,000 healthcare providers.

Utilizing these resources will enable the solution rollout to be as smooth and frictionless as possible. Not using these resources or modifying pre-approved ID.me instructions can result in a poor user experience and workflow problems. If you would like to create your own resources or modify ours, ID.me must review and approve the changes.

Included resources for you to use:

- Onboarding Lifecycle sheet
- Email templates
- ID.me contact information
- FAQs for partner teams

Included resources for your stakeholders to use:

- End-user guides
- FAQs for end-users

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FOLLOW THE YELLOW-BRICK LIFECYCLE

ID.me has a robust onboarding program for new partners. We know that the number of meetings involved in launching a new solution can be time-consuming, but each meeting is in place for your benefit. They will not be a waste of your time.

Partners that don't attend our suggested meetings and touchpoints often experience troubled integrations and create frustrating user experiences. Skipping informational meetings can lead to significantly lower success rates or even a completely broken solution in production.

Please do your best to ensure that all relevant parties attend the appropriate meetings. A few of the crucial meetings are outlined below:

a. **Kickoff Call:** This is where the onboarding process is defined. You will meet your ID.me CSM and learn about the steps required to go live.

b. **Marketing & Communications Process:** The communications to both end-users and internal parties are developed during this meeting. Collaborating on communication materials and messaging during the meeting results in a quicker approval process.

c. **Support Process:** The support process meeting defines how your support and ID.me's support will work to ensure smooth service for end-users.

d. **QA Screenshare:** The QA screenshare is the last opportunity to test the coordinated solution before it is pushed to production. This is where any last technical functionality issues or non-technical inputs, suggestions, or modifications can be discussed.

e. **Weekly Touchpoint:** This weekly meeting is a chance for you and ID.me to review implementation progress and discuss any outstanding items on the go-live checklist. If there is any new information for you, ID.me will share it here. If you have updates for ID.me, please share them here!

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THE FRONTLINE: TRAINING SUPPORT TEAMS

Your support team will remain the first line of support for any issues experienced by your end-users. It is absolutely critical that the support teams:

1. Know who ID.me is

2. Know what ID.me does

Support will likely initially receive questions from your customers about who ID.me is and why they are being required to verify their identity. Some end-users may be confused as to what ID.me does for you and may believe ID.me is responsible for features of your system that are wholly separate.

It is important that the support team is able to determine whether the issue actually involves ID.me, in which case they may need to pass the end-user onto ID.me support in accordance with the agreed-upon support process. If the issue does not involve ID.me, the support team will need to clarify that for the end-user and provide the appropriate help from your organization.

ID.me requires a Team Training for support teams and other frontline teams to educate them on the ID.me workflow. ID.me recently made this training mandatory due to miscommunication issues from support teams to end-users at partners that did not require the training. The miscommunications not only resulted in poor end-user experience, but also lessened the users' trust of both the partners and ID.me. The Team Training only lasts one hour and is led by your CSM. It will cover the ID.me workflows and includes a Q&A.

In addition to the team training, ID.me has included a sample email to introduce ID.me to your internal support teams. The email outlines who ID.me is, what we are responsible for in your system, and some common end-user questions.

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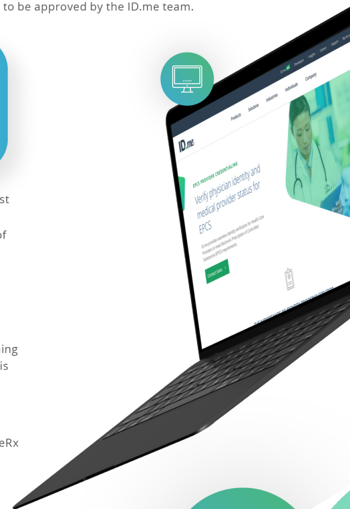
MARKETING MATERIALS

All the materials you'll need to communicate with your end-users are included in the Welcome Kit. If you choose to create your own materials that reference ID.me, they will need to be approved by the ID.me team.

Partners that utilize ID.me's Welcome Kit of resources have overall success rates in the 90th percentile immediately upon go live. Partners that do not utilize approved ID.me content to inform their end-users have had success rates as low as the 50th percentile.



End-users need to understand who ID.me is, why they should trust us, and why they need to complete identity verification. Failing to inform or misinforming the end-users can lead to a low number of users completing verification through ID.me.

ID.me provides:

a. Email Templates to:

- Introduce ID.me: End-users must be notified of the upcoming change in process. It should be communicated that ID.me is your new trusted credential service provider (CSP).
- Explain Why Verification is Required: End-users will likely have questions about why they must complete identity proofing. Explain the requirement is to comply with EPCS/eRx guidelines and that it is a one-time event.

b. User Guides to help end-users navigate through the ID.me workflow.

c. Accessing EPCS & eRx FAQs to help end-users answer their own questions on the identity proofing process in the healthcare space without having to go through customer support.

On all marketing materials, you should list your support team's contact information first, followed by a hyperlink to the Accessing EPCS & eRx FAQs.

7

USE EXPERIENCE WHEN BUILDING USER EXPERIENCE

DON'T:

- **Discourage users from verifying with ID.me:** This could result from making the ID.me button difficult to find, not providing explanation as to who ID.me is and the necessity of verification, or even making ID.me seem "scary" by using all-caps, big, red letters (we've seen it happen).
- **Modify the ID.me button:** There are several ways partners have tried to modify the ID.me button that have resulted in negative consequences.

Removing the ID.me name has created confusion when providers are then redirected to an ID.me page. Changing the color, like to red, has led to users not wanting to click the button because it presents as an alert.

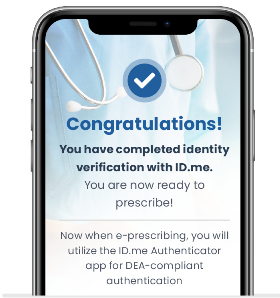
- **Use negative language when introducing ID.me:** While many partners introduce ID.me in email, some introduce ID.me within the healthcare platform. Users are sensitive to the language used in an introduction, which can influence whether or not they trust ID.me for their verification.

Example: Adding a redirect alert that a user will be leaving the platform site if they continue makes it seem like ID.me is not a trusted partner. Even adding a "Warning" message that users won't be able to prescribe using the platform if they don't verify can easily be misread or misinterpreted as a warning of ID.me itself.

- **Leave providers hanging:** Once users complete the ID.me verification process, they will be returned to your healthcare platform. While ID.me presents a screen when the user has been successfully verified, users may miss that message or may expect further confirmation from you that there is nothing more they need to do. Sending them to a page without a final confirmation results in confusion.

DO:

- **Make the ID.me verification button easy to find:** While providers are often required to use ID.me to continue prescribing, they shouldn't be expected to comb through the platform to find the verification button. Often sending providers a direct link to start the ID.me verification process is most straightforward.
- **Use an ID.me-branded button:** Options for this button will be provided by your ID.me engineering team.
- **Reference the Welcome Kit when writing copy:** The language in these materials has already been approved by ID.me. The messaging has been tailored to end-users and has proven to be effective at driving individuals to complete the verification process.
- **Build a page that providers will land on after they verify with ID.me:** The text on this page or popup should explain that the end-user has completed the identity verification process and that there are no further steps required of them before they can e-prescribe.
- **Make authentication when e-prescribing simple:** Showcase the ID.me button or mention authenticating with ID.me or authenticating with the ID.me Authenticator app in your UX copy. Showcasing in the UX what the provider is expected to do and where they'll be expected to take action will increase success rates and decrease friction.



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PILOT TEST

The pilot test (or beta test) will ensure that we don't launch something that is broken. During the pilot test, real end-users will run through the coordinated ID.me + partner solution in production.

This initial test offers:

a. **The first look at the real-time calls to authoritative databases**

b. **A functionality check before the fully integrated solution is advertised to end-users**

c. **A chance to observe any friction points that have previously gone unnoticed**

The pilot test is conducted by having an end-user join a video conference call, share their screen, and showcase the clickthrough workflow as they attempt to complete the coordinated solution.

Attendees to the pilot test should include a decision maker from each contributing party. We recommend a lead contributing engineer as well as a minimum of one business-side point of contact, like a project manager or customer success manager.

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TECH TIP: STORE ATTRIBUTES

Each time an end-user verifies their identity or authenticates to e-prescribe, ID.me will send a data payload with the end-user's attributes.

Your organization can choose to receive any of the following attributes:

- Email
- First name
- Last name
- Date of birth
- Social security number
- DEA number and schedules
- NPI number

These attributes should be stored to create an audit trail. Sending these attributes from your engineering team to other internal teams can be helpful to track end-user onboarding data. The ID.me sales integration engineers will work with your engineering team to automate storing these attributes.

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DEADLINE OR DEAD END

Working toward our agreed upon and coordinated target go live date is important to ID.me. We allocate team resources to support the target dates and deadlines that you communicate.

We recognize that sometimes priorities within an organization change, and as a result we are flexible and do our best to shift resources around. However, we can only accommodate these changes if we have adequate time to reallocate resources to your changing deadlines.

Please communicate any updates or unforeseen issues that affect target timeline and deadlines as soon as possible. If there is a hard deadline, such as your previous identity provider sunsetting their services, we need to know about it upfront in order to best support you.