

Authenticate Me

Getting Started Guide



What is Authenticate Me?

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Authenticate Me

Getting Started Guide

What is Authenticate Me?

Authenticate Me allows credit union staff to validate a member's identity using their cell phone. The feature is powered by DAON TrustX. The **Authenticate Me** button is available in CBX Inquiry, Phone Operator, and Xpress Teller tools as well as the Secondary Names and Member Transfer screens. Staff can begin the process by simply clicking the **Authenticate Me** button in any of these areas. This button launches the authentication screen, where staff can enroll members in the process or quickly authenticate previously enrolled members.

Enroll a Member

After selecting Authenticate Me and moving to the subsequent web browser screen, select the *Enroll* button and enter the information. This will begin the process by sending the member a text message; the member can then click on the link in the text message and agree to the process to opt in. Once authenticated, the credit union user gets a message that the member is authenticated.

Authenticate a Previously Enrolled Member

After using the Authenticate Me button, on the subsequent browser screen simply click *Authenticate* next to a phone number that was previously enrolled to initiate a text message to the member. The member following the link in the text message to authenticate. Once the process is complete the credit union user gets a message that the member is authenticated.

Member Requirements

Requirements for Activation

The member must have a mobile phone that supports:

- text messaging
- internet browsing
- access to a mobile or Wi-Fi network
- biometric authentication - this refers to a lock screen activated by using a code, face recognition, or fingerprints
- a supported cell phone browser: Safari (iOS), Chrome, or Firefox
- **Note that landline phones are not supported.**



Let's Get Started!

How Credit Union Staff Uses Authenticate Me


Credit union staff can access **Authenticate Me** through the following processes in CBX

Phone Operator/Inquiry

To verify a member, click the **Authenticate Me** button in the *Contact Information* tab.

The screenshot shows the CBX member profile interface. On the left is a sidebar with navigation links: Verify My ID, Comments (with a red notification icon), New Account, Closed Accounts, Name/Address, Sales Tools, OTB/Cards, Tax File Inquiry, ARU/HB Transfers, and Statements. The main content area has a header with member details: Name, Account #, Name ID, and BRONZE Tier with 465 Points. Below this is a tabbed interface with 'Contact Info' selected. The 'Contact Info' tab shows fields for Address, Phone 1, Phone 2, Email, and Cross sales activity. To the right of the 'Contact Info' tab is a vertical menu with buttons: My Other Accounts, Secondary Names, Cross-Sales, **Authenticate Me** (highlighted with a green arrow), Print Envelope, Online Banking, and Household Stats. At the bottom of the 'Contact Info' tab are buttons for 'Scan e-Document' and 'View e-Document'.

Secondary Names via Phone/Inquiry

To verify a joint member, select *Secondary Names* and  next to the member you're serving. Then click **Authenticate Me**.

The screenshot shows the 'Secondary Names Contact Information' page. On the left is a sidebar with a button labeled 'Envelope'. The main content area has a header with the CBX logo and the title 'Secondary Names Contact Information'. Below the header are fields for Account #, Email address, Secondary name, and Gender. To the right of these fields is a green arrow pointing to an 'Authenticate Me' button. Below the fields is a table with columns: Current Address, Contact, Numbers, Extension, and Label. The table has one row with data: Address #1 123 TEST, 0001, 666-666-6666, and HOME. Below the table are fields for City (TEST), State (IA), and ZIP (49135 0000). At the bottom is a checkbox labeled 'Wrong address'.

How Credit Union Staff Uses Authenticate Me

Xpress Teller

Access **Tool #1600 Xpress Teller**. Select the member you're serving and click **Authenticate Me**.

The screenshot shows the Xpress Teller interface. On the left, there's a sidebar with fields: Name, Account #, Birthdate (Jan 21), Gender (M), Age (39), Drivers license #, and Code word. The main area has a header 'CBX - Who are you serving today? - Who are You Serving?'. Below this, there's a section for 'Account' and 'Membership designation' (MI Individual). A table lists member details with columns 'Name', 'Age', and 'Gender'. A green arrow points to the 'Authenticate Me' button in the top right corner.

Name	Age	Gender
[Redacted]	39	M
[Redacted]		M

Standard Teller


On the *Verify Member* screen, select **Authenticate Me**.


The screenshot shows the Standard Teller 'Verify Member' screen. The top bar includes the 'Verify Member' title and 'Individual' status. A sidebar on the left lists: Verify ID, Verified Member, Sales Tools, Tracker Review, and Membership Designation. The main area displays member information: Account #, Corp ID (01), Name ID (KA), and Membership (BRONZE). Below this, there's a section for 'SSN/TIN', 'Birthdate', and 'Drivers License #'. A green arrow points to the 'Authenticate Me' button in the bottom right corner.

Contact Info	Member Data	Products	Config	Status Flags	Decision Advice
Address	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
Phone 1	[Redacted]	MOBILE			

How Credit Union Staff Uses Authenticate Me

Secondary Names via Teller

To verify a joint member, select *Secondary Names* and  next to the member you're serving. Then click **Authenticate Me**.


Secondary Names Contact Information

Envelope

Account #

Email address

Secondary name

Gender

Current Address

Address #1 123 TEST

City TEST


State IA ZIP 49135 0000


☐ Wrong address

Contact	Numbers	Extension	Label
0001	666-666-6666		HOME

Authenticate Me

Member Transfer

Access **Tool #516 Member Account Transfer**. Enter the *From account* and the *Transfer amount*, then select *Verify Member*. On the *Verify Member* screen, click **Authenticate Me**. To verify a joint member, click *Secondary Names* and  next to the member you're serving. Then click **Authenticate Me**.


Verify Member

Individual

Verify ID

Verified Member

Sales Tools

Tracker Review

Membership Designation

Account #

Corp ID 01 Name ID KA

SSN/TIN

Birthdate

Drivers License # *****1212

Membership

BRONZE

More Info

Contact Info

Member Data

Products

Config

Status Flags

Decision Advice

Address

Phone 1 MOBILE

Secondary Names

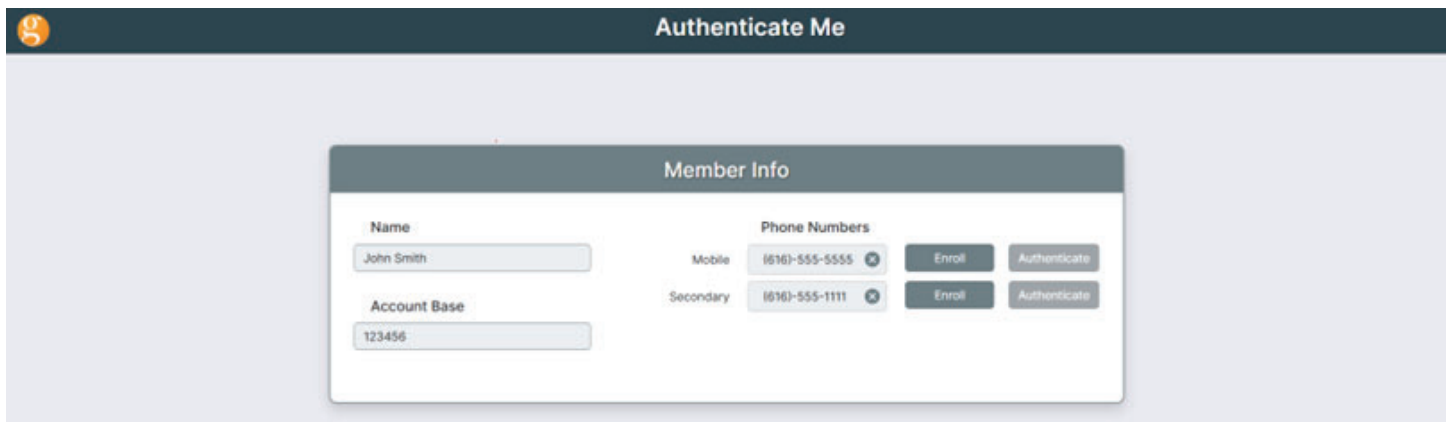
Authenticate Me

Cross-Sales

How Credit Union Staff Uses Authenticate Me

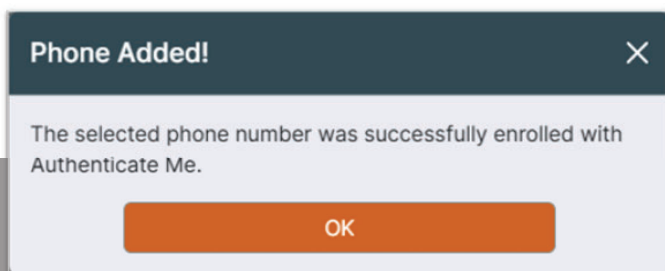
Authentication Me Enrollment/Authenticate

Once on the **Authenticate Me** website, enroll a member by clicking *Enroll* or if the member is already enrolled, click *Authenticate* next to the phone number they want to use. Both options will send the member a text message to start the authentication process on their end.



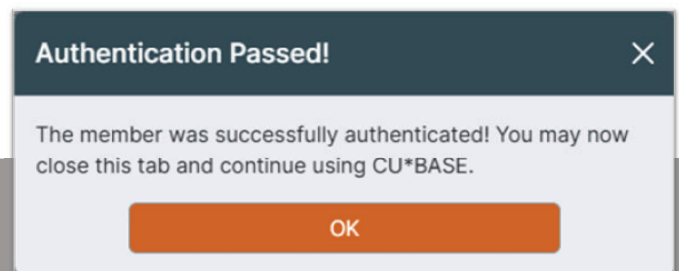
The screenshot shows the 'Authenticate Me' website interface. At the top is a dark blue header with the 'g' logo and the text 'Authenticate Me'. Below this is a light gray background with a white 'Member Info' form. The form has two sections: 'Name' and 'Account Base' on the left, and 'Phone Numbers' on the right. The 'Name' field contains 'John Smith'. The 'Account Base' field contains '123456'. The 'Phone Numbers' section has two rows: 'Mobile' with the number '(616)-555-5555' and 'Secondary' with the number '(616)-555-1111'. Each row has an 'Enroll' button and an 'Authenticate' button.

The member will receive a text message with a link to enroll or authenticate themselves. When the member responds on their mobile device, the employee will see one of the following confirmation messages in the **MemberPass Authentication site**.



The screenshot shows a confirmation message box titled 'Phone Added!' with a close button (X) in the top right corner. The message text reads: 'The selected phone number was successfully enrolled with Authenticate Me.' At the bottom is an orange button labeled 'OK'.

Enrollment Message



The screenshot shows a confirmation message box titled 'Authentication Passed!' with a close button (X) in the top right corner. The message text reads: 'The member was successfully authenticated! You may now close this tab and continue using CU*BASE.' At the bottom is an orange button labeled 'OK'.

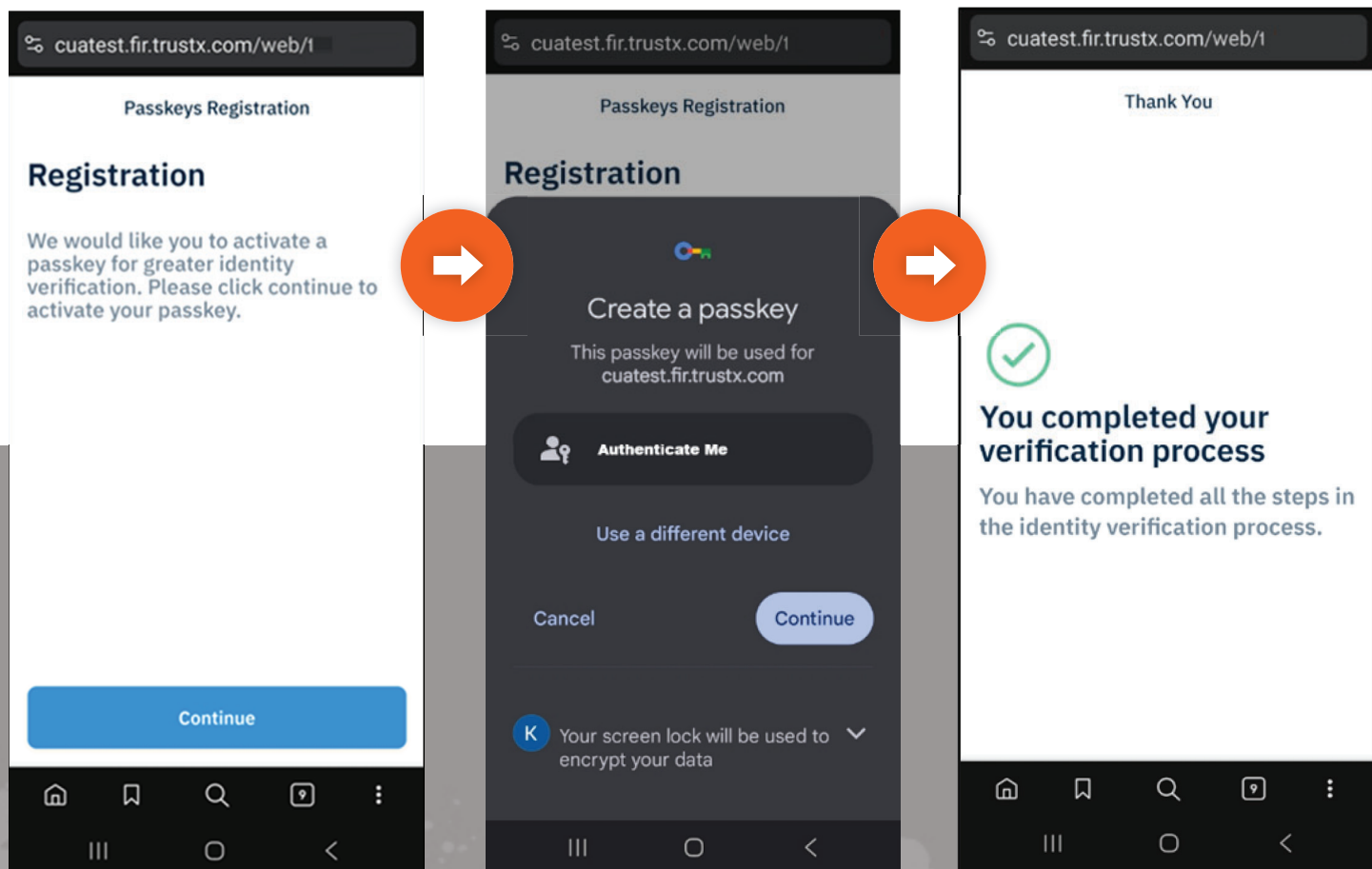
Authentication Message



Member Enrollment Process

After the member clicks the link in the text message, a web browser will open with the following screens displayed. The member will then need to select **Activate** to enroll this device to their phone.

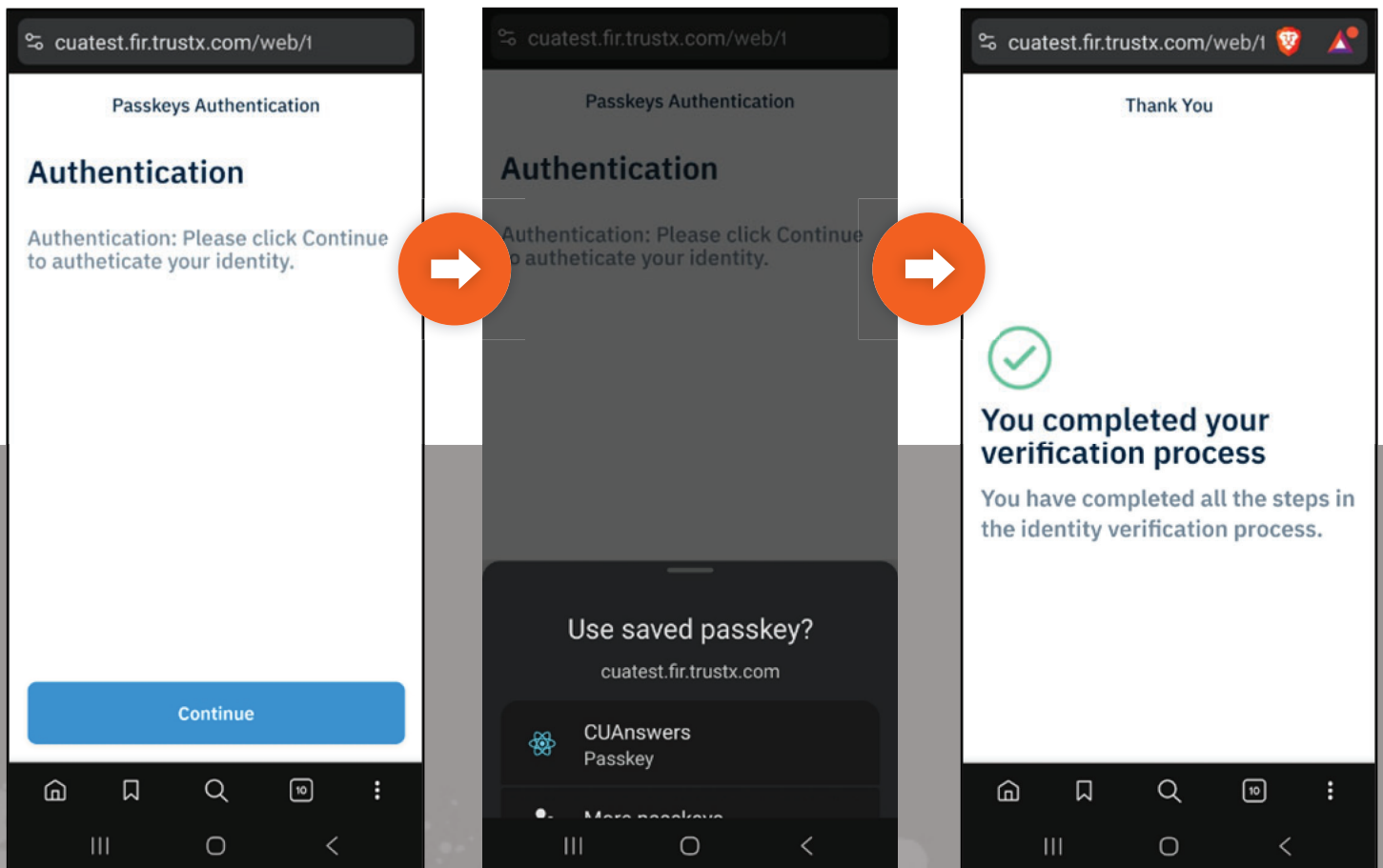
The following example was on an android operating system, but apple devices are very similar.



Member Authentication After Enrollment

After the member clicks the link in the text message, a web browser will open with the following screens displayed. The member will select **Activate** to send the message to the credit union verifying themselves.

The following example was on an android operating system, but apple devices are very similar.



Recommendations

Special Considerations and Recommendations

This is great tool to authenticate your members! Be prepared for when this tool doesn't work and ensure your staff is ready to start the next authentication method in case of the following issues...

Technology Issues

- Member's cell phone does not support:
 - biometric authentication
 - web features
 - texts
- Texts are not received in a timely manner

Human Issues

- Member does not have a cell phone
- Member does not have their cell phone on them
- Member doesn't want to use the product

How to get Support

If you have questions or are having issues with Authenticate Me please reach out using the contact information below.

Call: 616-285-5711 x255

Reach out to us through AnswerBook: <https://kb.cuanswers.com/cuanswers>