CUANSWERS Imaging Solutions

# 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.**

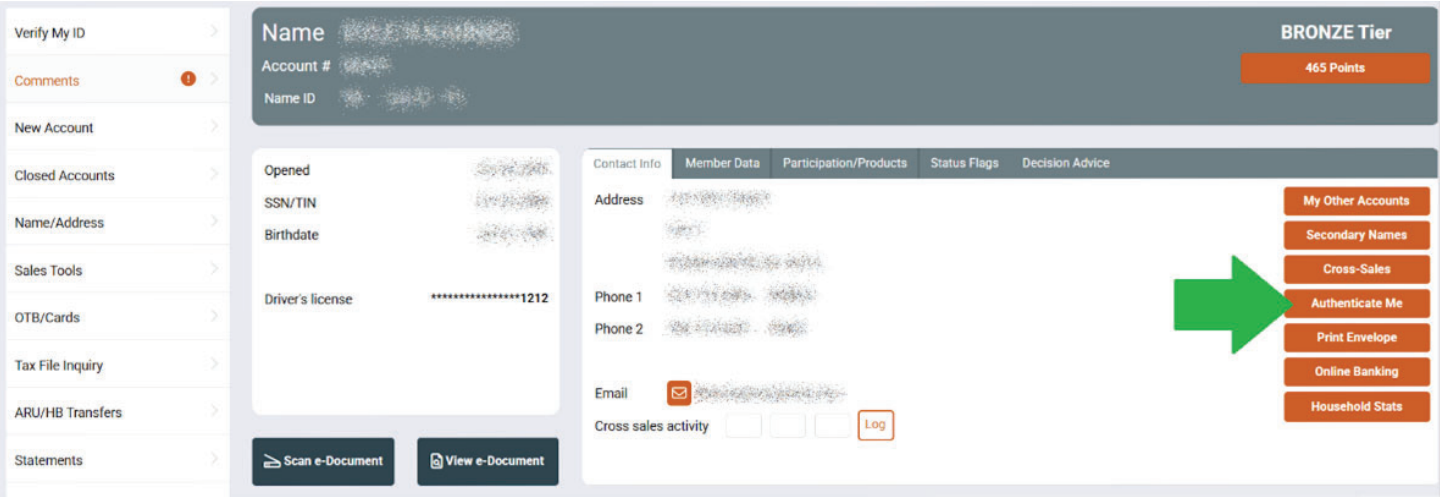
→ *Let's Get Started!*

# How Credit Union Staff Uses Authenticate Me

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

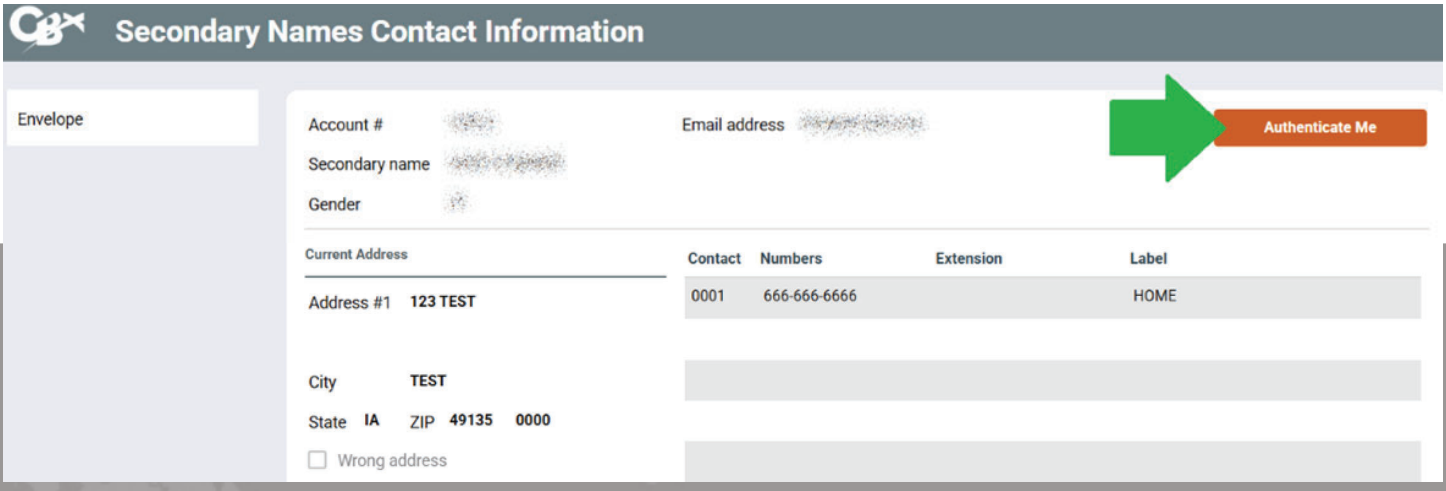
## Phone Operator/Inquiry

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




## Secondary Names via Phone/Inquiry

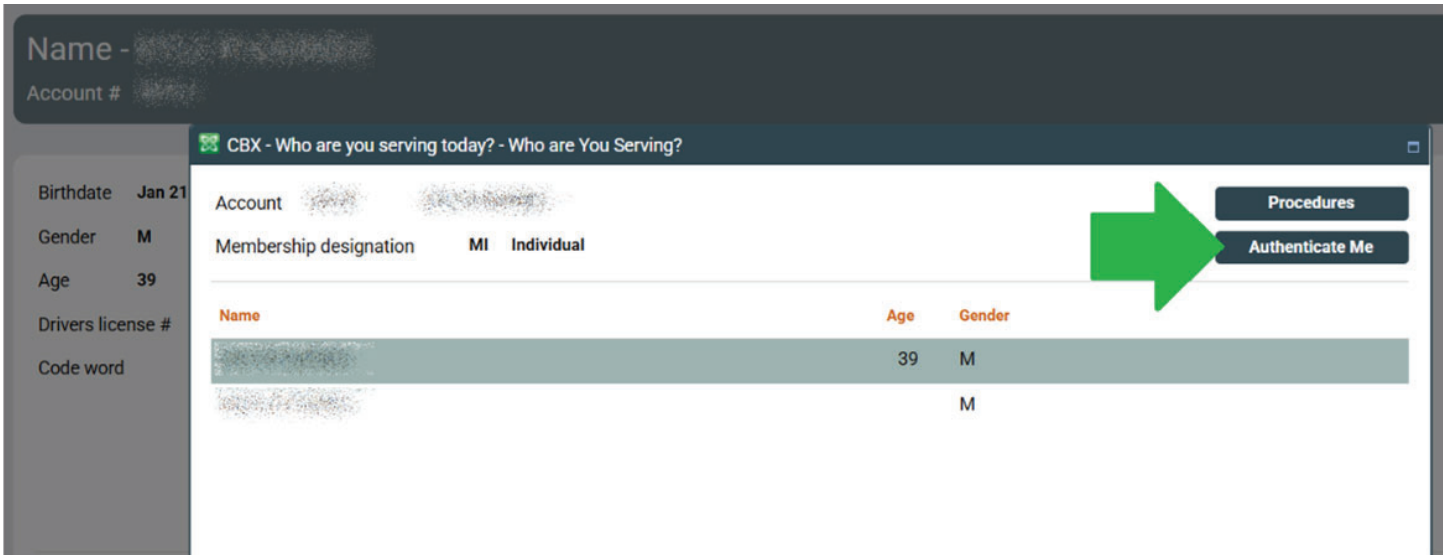
To verify a joint member, select *Secondary Names* and next to the member you're serving. Then click **Authenticate Me.**



# How Credit Union Staff Uses Authenticate Me

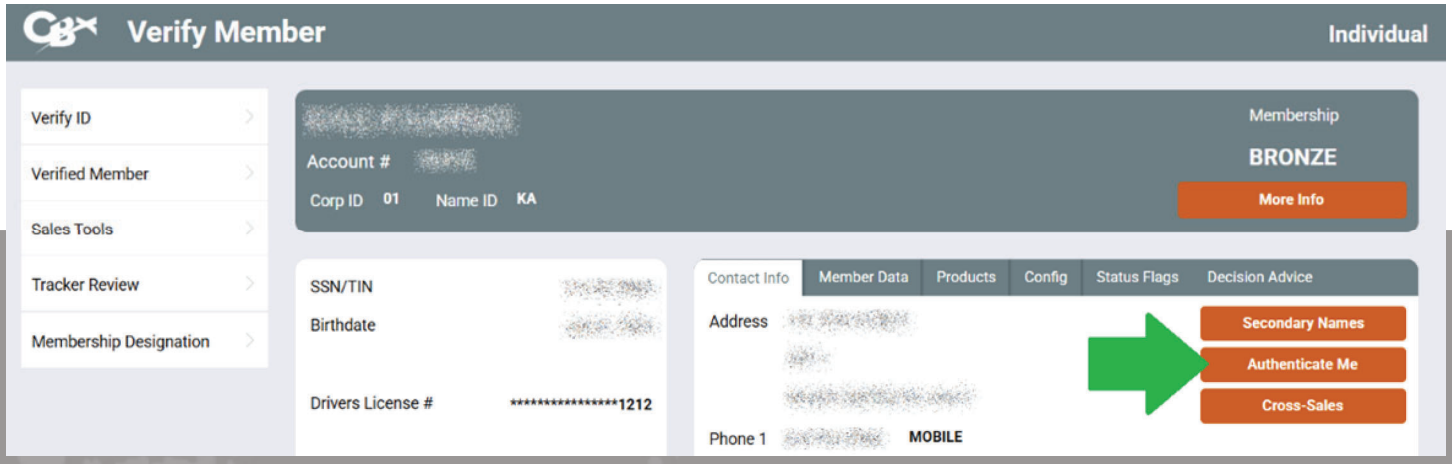
## Xpress Teller

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




## Standard Teller

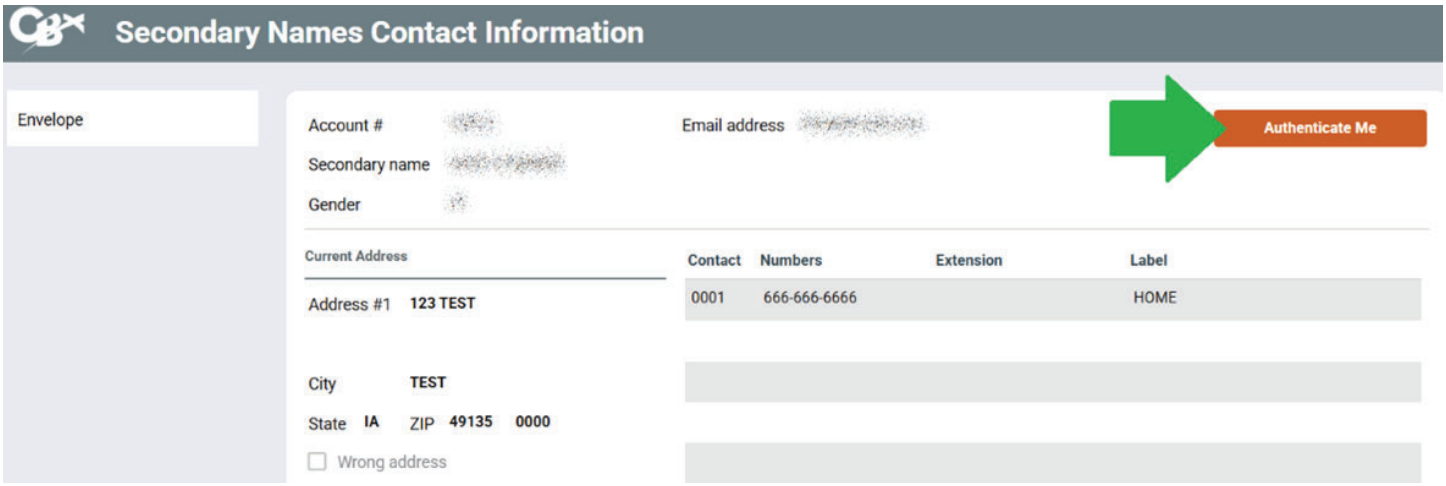
On the *Verify Member* screen, select **Authenticate Me.**



# 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.**



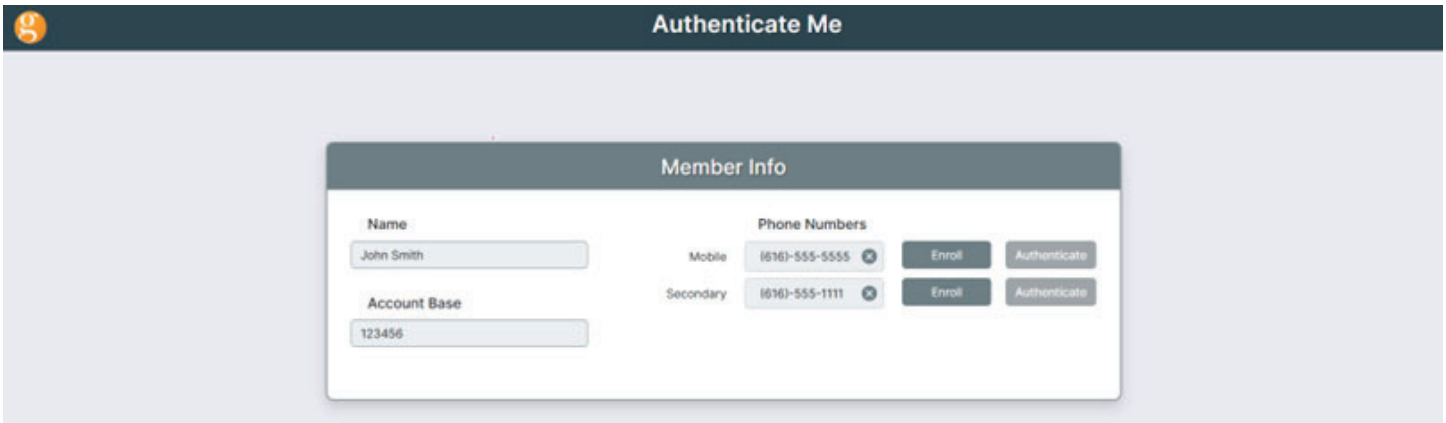

## Member Transfer

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.**

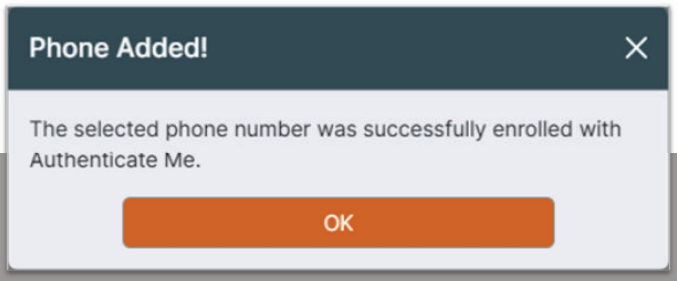
# How Credit Union Staff Uses Authenticate Me

## Authentication Me Enrollment/Authenticate

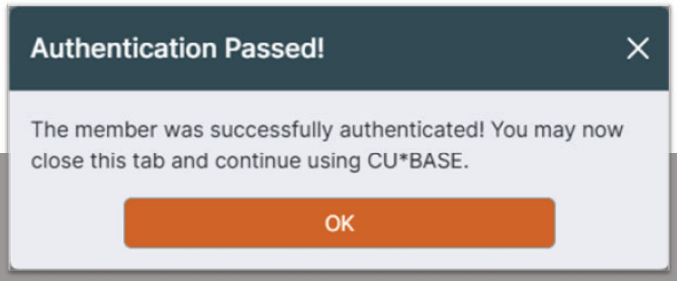
Once on the **Authenticate Me** website, enroll a member by clicking *Enroll* or if the member is already enrolled, click *Authenticate* next to the phone number they want to use. Both options will send the member a text message to start the authentication process on their end.




The 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.**




**Enrollment Message**



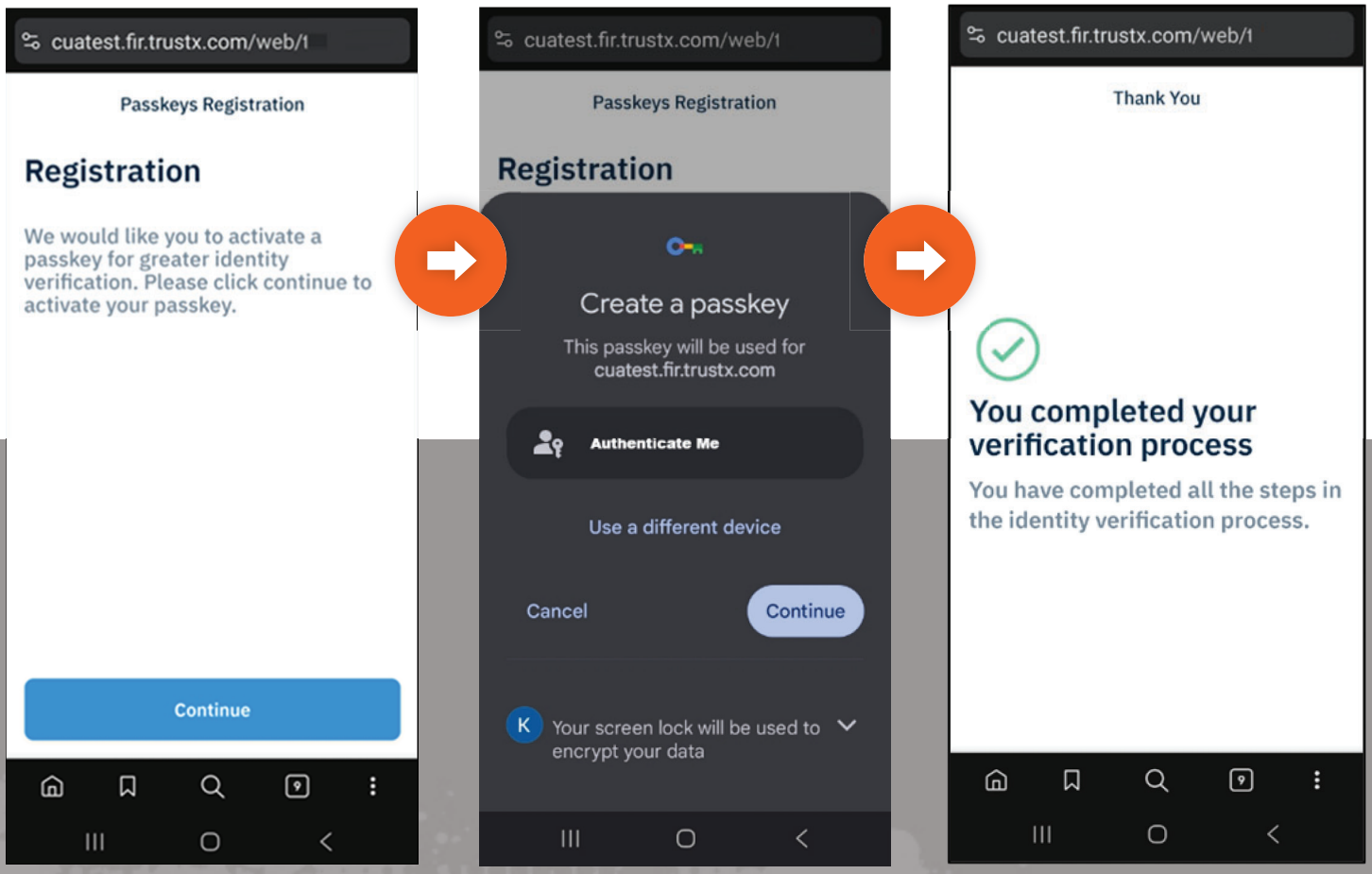

**Authentication Message**

→ *Member Enrollment Process*

## 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.*

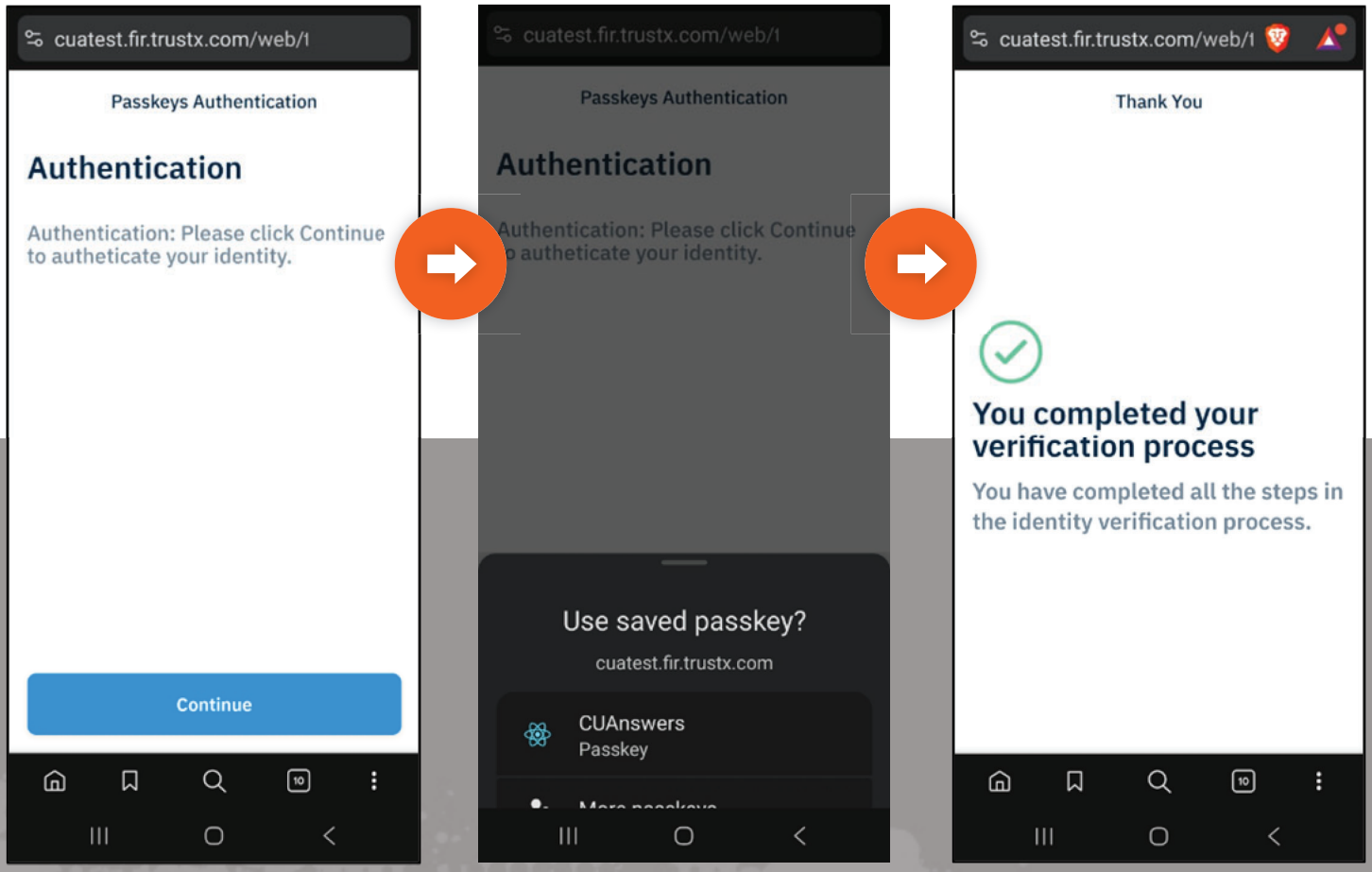



→ *Member Authentication*

## 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

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