SMART ID – ROLL-OUT UPDATE

Smart ID is up and running in 709 branches as of mid-January. We are now ramping up the roll-out across the agency network, with the first group of 2018 due to go live at the end of this month.

This will continue throughout 2018, with the whole network due to be live by mid-November.

Later this year we will start deleting the old Horizon IDs for branches that are live with Smart ID, so branch colleagues will no longer be able to use them. We'll issue reminders to the branches.

We'll be adding some improvements over the next few months as well.

These include reminders on Horizon screens for colleagues to complete their training. And if a colleague's training has expired and they would therefore be locked out of Horizon sales, they will get a prompt when they try to log in asking them to complete the training right away, and their training record will be updated immediately. This will be introduced in good time before the training tracker is switched on.

We're also planning to introduce a dual login so a branch user could have more than one session open on multiple Horizon terminals at the same time (but only have one session active at any one time). They could switch between sessions without having to log in and out of each one. This would mean branches no longer need the current Restricted Use ID we've given them for certain transactions.

We plan to switch on the training tracker for Smart ID branches starting from July/August (date is to be confirmed) in phases. This is when an individual will be locked out of Horizon, or unable to sell certain products, if they have not completed their compliance training on time using their new ID. We will issue plenty of reminders and chasers as well as the usual training reminders.

The key is for branches to get into the habit of doing their training on time and in the right way now (if they're not already doing so), so they won't need to worry about it.

SMART ID ON YAMMER

When people were supporting branches at Christmas, a few questions came up about the new Smart ID system and the right way to get set up and log on in a Smart ID branch. Here's the correct information around the points people raised:

- You'll already need to have a Post Office ID before you can be set up as a user in a Smart ID branch
- Tell the branch manager/postmaster your Post Office ID, and they'll use it to set up your Horizon User ID
- The Horizon User ID will be auto-generated (replacing the manual process in non-Smart ID branches) – it's a combination of your Post Office ID plus a number
- The branch manager/postmaster will set up your initial password
- Then when you log on to Horizon for the first time using your Horizon User ID you will be prompted to change your password – please don't share your new password with anyone
- There's no change to Global IDs - you can continue to use them to log in at any branch and create users if needed as part of a branch audit
- As for the different terminology you might hear, please use Smart ID when you talk about this with branches. EUM (Enhanced User Management) is just the internal name of the project to roll out Smart ID
- Smart ID gives you an ID that's unique to you and is linked to your individual training records
- You can use it at any Post Office till as it belongs to the individual rather than to the branch

POST OFFICE IDs – FREQUENTLY ASKED QUESTIONS

You'll have seen these back in August when we issued your POIDs, so here's a refresher to jog your memory:

Enhanced User Management/Smart ID background

Enhanced User Management (known as Smart ID out in our branch network) is a new way of controlling access to Horizon and products based on an individual being vetted and having completed their regulatory compliance training.

Once a branch has migrated to Smart ID, any new users who need to be created on the Horizon system will require a Post Office ID (POID), which is a unique identifier for the individual and is linked to their training record. As there are occasions during the course of an audit or on-site training where a Postmaster/Branch Manager will need to create a NOA as a new user in the branch, we have issued you with your own POID for this purpose.

What do I do with my POID when I receive it?

Keep the POID safe. You will only need to use the POID if you go into a branch that has migrated to Smart ID and you need the Postmaster/Branch Manager to create you as a user on the system.

How will I use my POID in branch?

You will need to tell the Postmaster/Branch Manager your POID so they can create a new Horizon Username for you (full details of how the Postmaster/Branch Manager does this can be found on Horizon Online Help – Back Office [F10], Smart ID [F10], Create New User [F3]). The Horizon Username created will be linked to your POID as part of the creation process, but for all other purposes will operate the same as now.

Does my POID expire after a period of no use?

No, the POID does not expire.

What happens if my training expires?

Your POID (and any Horizon Usernames linked to it) will be attached to your training record. So it is important you keep your compliance training up to date. Failure to do so will mean when you try to log in at a Smart ID branch you will either be prevented from logging in entirely or from being able to sell certain products.

Does any of this impact my Global User ID?

No, this does not impact the operation of your Global User ID.

Where do I find more information?

There is a Smart ID section on Horizon Online Help (Back Office [F10], Smart ID [F10]) which contains all the current branch information.

HOW YOU CAN HELP

There are some things you can do too to make sure your branches are using Smart ID and no one gets locked out when the training tracker is switched on:

- If you spot someone in a Smart ID branch still using their old Horizon ID, please explain to them that they need to use the new one, and what they need to do
- If you're aware that some people haven't completed their training on time and using their new ID, please encourage them to do this and explain why

- Help spread the word – ask people in branch if they are aware of Smart ID and, if not, tell them about it and what they'll need to do when we contact them asking for their details in the coming weeks and months
- As we get close to switching on the training tracker for each group of branches, we might need your support with branches that still aren't using Smart ID

FUTURE UPDATES AND QUESTIONS

If you have further questions or would like regular updates:

- We can arrange for someone from the programme team to join a future team call and answer your questions if you wish
- EUM Product Owner Shaun Turner runs regular stakeholder drop-in sessions (Tuesday and Friday at 11.30) – you are welcome to have a Network Operations representative on the calls, and you don't need to join every call but can dial in when you need to – please let Shaun know (shaun.turner@ GRO) if you'd like a nominated representative to be included on the invitation.