

Doxim CCM

Secure Document
Delivery (SDD)

Secure Delivery of Regulatory Documents by Email or SMS/Text

Today, service providers typically present digital versions of regulated documents to customers through a portal account in order to meet security and compliance requirements surrounding the handling of PII.

Consumers, however, are growing weary of having to create and maintain a host of customer accounts and login credentials, which can be especially inconvenient in situations where engagement is one-off or infrequent. Consumers want a secure yet more convenient way of receiving and reading their documents without the necessity of another portal account. They also prefer engagement directly on their mobile device, which is typically available in their purse or pocket.

A Modern, Frictionless Experience

Doxim's Secure Document Delivery (SDD) solution gives consumers the modern, frictionless experience they desire. Consumers can securely gain access to their regulated documents when notified by email or SMS/text without the requirement to create and login to a portal account. They can instantly access their documents and bills on their desktop or mobile device – for a fast and easy response.

Heightened Security

When customers engage by email or SMS, there are many layers of protection. They have the security offered by their device and the security offered by their email or SMS provider. In addition, Doxim's SDD uses a secure one-time password (OTP) to verify the recipient and release access to the document.

- **Secure document message** – a communication is sent to the consumer by email or SMS which contains a link to the regulated document stored in Doxim ECM.
- **Verification message** – after clicking the link in the secure document message, a verification message containing a one-time password is sent to the consumer via email or SMS.
- **Enter the OTP and access the document** – a password screen appears prompting the consumer to enter the one-time password. After the OTP is verified, the document is presented to the consumer in their browser. When the session ends, the user will need to revalidate to access the document again.

For ultimate security and protection, we recommend that any and all PII remain within the document securely stored in Doxim ECM, rather than within the text/SMS or email message.



Secure Delivery of Regulatory Documents by Email or SMS/Text

- Convenient engagement on mobile devices
- Delivery without the need for customer portal login
- Increased opens and clicks
- Faster responses
- Improved customer satisfaction
- Secure and compliant
- Delivery and access reporting

Ideal for One-Off or Infrequent Engagement

SDD can be used for any type of document that is stored in the Doxim ECM. However, the solution solves a unique challenge for one-off or less frequent engagement when it is difficult for consumers to remember the portal account login.

While the documents linked to in the text/SMS or email communication must be stored in Doxim ECM they can include hyperlinks to a variety of other web properties and processes, including payments.

Some one-off or infrequent use cases where direct engagement, without the use of a portal, creates a better experience include:

- **Municipal** communications – parking tickets, dog licenses, construction applications
- **Insurance policy** communications – ANOC errata, home policy changes, renewals
- **Claims** communications from insurers - EOB, MSN, letters
- **Wealth** communications – account opening, statements, confirms, fund reports, letters, tax
- **Financial services** – letters or other communications requiring eSignature
- **Utilities** – Bills, letters, disconnect notices, payment reminders
- **Consumer finance** – bills, statements, notices, renewals, refinancing or collections
- **Collections** communications – model validation notice, letters, tax time settlement offers

Set-Up and Day-to-Day Delivery

During onboarding, Doxim implementation specialists perform the initial set up. Doxim Professional Services will configure SDD as part of your regular batch communications cadence whether it be daily, weekly monthly or ad hoc.

Engagement Traceability & Reporting

For compliance reasons, many clients need to demonstrate that the regulated document they sent was delivered and accessed by the recipient. In order to meet this requirement, reporting is available through our dashboard and includes:

- Records Loaded Report – the total number of individuals who received (aggregate)
- Notifications Sent Report – the list of everyone who was sent the secure document
- Delivery Report – the total number of sends, opens, bounces, undeliverable with ability to search for an individual (aggregate numbers)
- Job Viewed Report – the list of people who viewed the documents

Doxim CCM Secure Document Delivery (SDD)

Digital Delivery of Regulatory Document by Email or SMS – with One-Time Password (OTP)

Features

Included

Administration

Set-up and configuration during client onboarding

✓

Ongoing processing/delivery by Doxim

✓

Contact and List Management

Batch process

✓

Delivery and Access Reporting

Records loaded

✓

Notifications sent

✓

Delivery report

✓

Documents viewed

✓

Security & Compliance

Available two-factor authentication (2FA)

✓

Identity verification via Doxim enrollment process

✓

ADA and AODA compliant documents supported

✓

Documents encrypted at rest

✓

Complete audit trail of events

✓

SOC1 and SOC2 compliant

✓

Integrations

Doxim ECM required

✓

Integration to CCM Job Processing available (if CCM used)

✓

Integration to DBM available (if DBM is used)

✓

Book a meeting to learn more about the secure delivery of regulatory documents to your customers by email or SMS/text - for a convenient, portal-free experience.

[Request Demo](#)



Doxim is the customer communications management and engagement technology leader serving highly regulated markets, including financial services, utilities and healthcare. We provide omnichannel communications and payment solutions that maximize customer engagement and revenue, while reducing costs. Our software and technology-enabled managed services address key digitization, operational efficiency, and customer experience challenges through a suite of plug-and-play, integrated, SaaS software and technology solutions. Learn more at www.doxim.com.