defend-id

CLOSE & LAUNCH CHECKLIST · 2026

They said yes. Here's what happens next.

Work through these steps in order. Check each one off before moving on.

1 Confirm the plan in writing — PARTNER + EMPLOYER

- [ ] Business Essentials ($99/month) or Business Comprehensive ($99/month + $5.99 per employee)
- [ ] Number of employees to cover
- [ ] Name, email and phone of the employer's main contact

Get the decision by email from the decision maker so there's no confusion later.

2 Collect the employee list — EMPLOYER

- [ ] Name, date of birth and contact information for each employee, using the **Sample Census** file in the toolbox

Don't collect Social Security numbers or other data the census doesn't ask for.

3 Submit the group — PARTNER

- [ ] Log in to the partner portal at **portal.defend-id.com/account/login** and submit the group

4 Prepare HR to announce the benefit — PARTNER

- [ ] **Comprehensive:** send HR the employer-paid employee guide
- [ ] **Essentials:** send HR the Employee Enrollment Guide (voluntary plans and pricing) so employees can add Gold or Platinum
- [ ] Share the **Enrollment Experience** walkthrough so HR knows what employees will see

5 Employees enroll and activate — DEFEND-ID + EMPLOYEES

defend-id handles enrollment. Employees receive an activation email and complete enrollment online. Monitoring alerts go to the employee, not the employer.

6 Keep the roster current — EMPLOYER

The employer adds new hires and removes departures. Comprehensive pricing adjusts with headcount. That is the only ongoing admin.

Stuck on a step?

Contact defend-id at **sales@defend-id.com** or **803-232-5675**. Have the company name and the step you're on ready.