<u>*Examples - Setting Up Your Account and Gaining Provider Access*</u>

Create Your Account

If you have received an <u>Invitation E-mail containing a PIN and you don't yet have an I&A account</u>, follow the instructions in section *How New I&A Users Register from a Staff End Users (SEU) or* Access Manager (AM) Invitation.
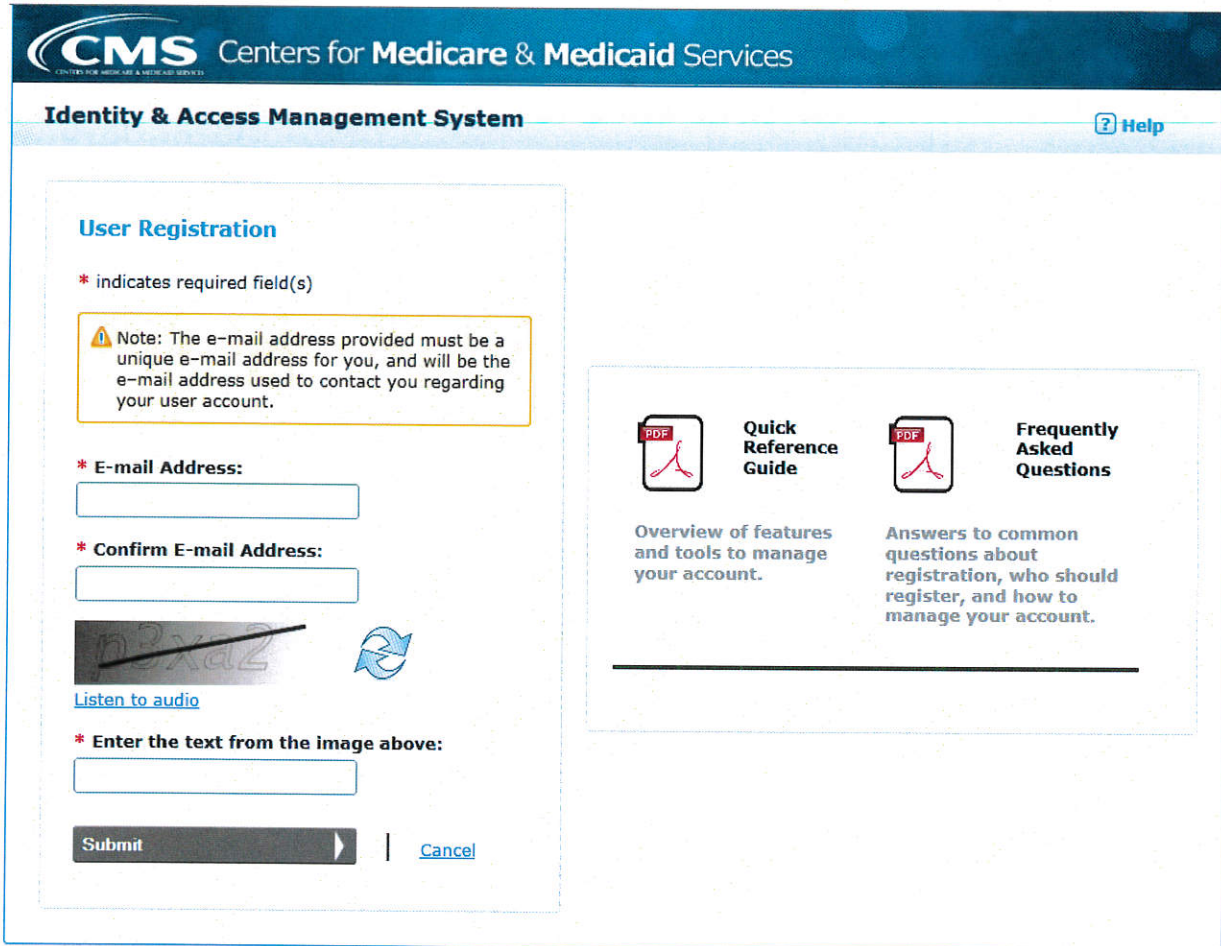
If you have received an <u>Invitation E-mail containing a PIN and you already have an I&A account</u>, follow the instructions in section *How an Existing I&A User Responds to a Staff End Users (SEU) or* Access Manager (AM) Invitation *Access Manager (AM)*.

1. select **Create Account Now** ▶ button or select the <u>register</u> link on the I&A login page and you will be navigated to the User Registration page.

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2. Enter your email address and the text seen in the image on the User Registration page. If you have trouble seeing the image you can either select the Listen to Audio link or select the icon to have the image refreshed.

Once you have successfully entered the required data, select the *Submit* button

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Identity & Access Management System   ? Help

User Registration

* indicates required field(s)

⚠ Note: The e-mail address provided must be a unique e-mail address for you, and will be the e-mail address used to contact you regarding your user account.

* **E-mail Address:**

[   ]

* **Confirm E-mail Address:**

[   ]

n3Xa2

Listen to audio

* **Enter the text from the image above:**

[   ]

| Submit ▶ | | Cancel |

PDF **Quick Reference Guide**

Overview of features and tools to manage your account.

PDF **Frequently Asked Questions**

Answers to common questions about registration, who should register, and how to manage your account.

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3. Enter the required data on the User Security page and select the *Continue* button.
   Security Questions and Answers cannot be duplicated. You must select 5 different questions, each having a unique answer (different from the other 4 answers).

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User Registration - User Security

Step 1	Step 2	Step 3	Final
User Security	User Info	MFA Setup	Review

* indicates required field(s)

User ID Compliance:
- Must be 6-12 alphanumeric characters and unique within the Identity & Access Management System and NPPES.
- Must not contain more than four numeric characters, any spaces, or any special characters.
- Must not contain personally identifiable information such as SSN or NPI.

* **User ID:**

* **Password:**

Password Compliance:
- ✖ Must be 8-12 alphanumeric characters.
- ✖ Must contain at least one letter.
- ✖ Must contain at least one number.
- ✖ Must contain at least one valid special character.
- ✖ Must not contain any invalid special characters.
- ✖ Must not start with numeric characters.
- ✖ Must not contain three repeating characters.
- ✖ Must not be the same as your User ID.
- ✖ Password must match Confirm Password.

* **Confirm Password:**

Please select five different security questions and enter their answers below:

* **Question 1:**
Select ▾

* **Answer 1:**

* **Question 2:**
Select ▾

* **Answer 2:**

* **Question 3:**
Select ▾

* **Answer 3:**

* **Question 4:**
Select ▾

* **Answer 4:**

* **Question 5:**
Select ▾

* **Answer 5:**

Continue ▸ | Cancel

4. Enter the required data on the User Information page and select the **Continue** button.

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Identity & Access Management System   ? Help

User Registration - User Information

| Step 1 ✔ User Security | Step 2 User Info | Step 3 MFA Setup | Final Review |

Please provide the details below. They will be used to verify your identity.   « Back to Previous Page

* indicates required field(s)

* First Name:

Middle Name:

* Last Name:

Suffix:
[▾]

* Business Phone Number:

Fax Number:

* Date of Birth: *(MM/DD/YYYY)*

* SSN:

Primary E-mail Address:
sam.elliot@email.com

* Personal Phone Number:

* Home Address Line 1:

Home Address Line 2:

* City:

* Country:
[United States ▾]

* State/ Province/ Territory:
[SE - Select One ▾]

* Postal/ZIP Code:

[**Continue** ▶] | Cancel

5. The system will attempt to standardize your address to meet USPS standards. If the standardized address is different from what you entered. The system will alert you. We encourage you to use the standardized address unless it is incorrect.

Select your address ⊗

⚠ **Important Note: Your address has been standardized.**
Your address has been standardized to USPS standards to your ensure contact information is accurate. Both the address you entered and your standardized address are displayed below. If the standardized address is incorrect, you may choose to use the address you entered by selecting it below. If you wish to modify the address, select Cancel to return to the address entry page.

◉ **Use Standardized Address:**

719 W Holly Ave
Sterling, VA 20164-4621
United States

○ **Use The Address I Entered:**

719 W Holly Ave
Sterling, VA 20164
United States

Continue

6. You will be required to set up at least one Multi-Factor Authentication (MFA) method. And will be given the option to set up a second (alternative) method. Select your Primary Authentication Method from the dropdown list and select **Continue**.

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Identity & Access Management System   ? **Help**

User Registration – Multi-Factor Authentication (MFA) Setup

Step 1 ✓ User Security   Step 2 ✓ User Info   Step 3 MFA Setup   Final Review

* indicates required field(s)   « Back to Previous Page

We need a way to deliver a temporary code to you to verify your identity. We can do this via a phone number (either by voice or Text/SMS) or you can choose to have it sent to you in an e-mail. You must enter this code on the next page.

You must identify at least one method for receiving your verification code; however, you may provide up to two different methods.

Please note the following Text/SMS and Voice Call Details:

- International phone numbers are not supported.
- Standard message and data charges may be applied by your carrier.
- By entering a Mobile Phone Number, you are certifying that you are the account holder or have the holder's permission to use the phone number to receive a Text/SMS message.

Please select a Multi-Factor Authentication Method:

* **Authentication Method:**

[Select Primary Authentication Method   ▾]

Continue ▶ | Cancel

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* **Authentication Method:**

Select Primary Authentication Method
Phone Number Text/SMS
E-mail Address
Phone Number Voice Call

7. If you select E-mail Address, the e-mail address will be pre-populated with your primary e-mail address you entered when you started registration, however you may change it.

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Identity & Access Management System   **?** Help

User Registration - Multi-Factor Authentication (MFA) Setup

| Step 1 ✓ | Step 2 ✓ | Step 3 | Final |
| User Security | User Info | MFA Setup | Review |

* indicates required field(s)   « Back to Previous Page

We need a way to deliver a temporary code to you to verify your identity. We can do this via a phone number (either by voice or Text/SMS) or you can choose to have it sent to you in an e-mail. You must enter this code on the next page.

You must identify at least one method for receiving your verification code; however, you may provide up to two different methods.

Please note the following Text/SMS and Voice Call Details:

- International phone numbers are not supported.
- Standard message and data charges may be applied by your carrier.
- By entering a Mobile Phone Number, you are certifying that you are the account holder or have the holder's permission to use the phone number to receive a Text/SMS message.

Please select a Multi-Factor Authentication Method:

* **Authentication Method:**

E-mail Address ▼

You can use the E-mail Address associated with your I&A account or enter a new one.

* **E-mail Address where you will receive your verification code**

sam.elliot@email.com

Select the Send E-mail button to verify that it works.

Send E-mail ▶ | Cancel

If you select Phone Number Text/SMS, you must enter your 10 digit phone number.

Please select a Multi-Factor Authentication Method:

* **Authentication Method:**

| Phone Number Text/SMS ▾ |

* **Phone Number:**
Enter your 10 digit phone number the way you normally dial it.

| (703) 555-1212 |

Send Text/SMS ▶ | Cancel

If you select Phone Number Voice Call, you must enter your 10 digit phone number, and have the ability to enter an extension.

Please select a Multi-Factor Authentication Method:

* **Authentication Method:**

| Phone Number Voice Call ▾ |

* **Phone Number:**
Enter your 10 digit phone number the way you normally dial it.

| (703) 555-1212 |

Extension:
Enter your phone number extension if applicable.

| 12345 |

Call ▶ | Cancel

8. Enter the code you receive and select *Verify Code.*
   If for some reason you do not receive a code, select the link (*Resend E-mail, Resend Text/SMS or Call Again)* to have a new code sent to you. If you need to change your method or update your e-mail address (Phone Number, if you selected Text/SMS or Voice Call) select the *Back to Setup Page* link to start the set up again.

If you selected Phone Number Text/SMS, you will see the following on the verification page
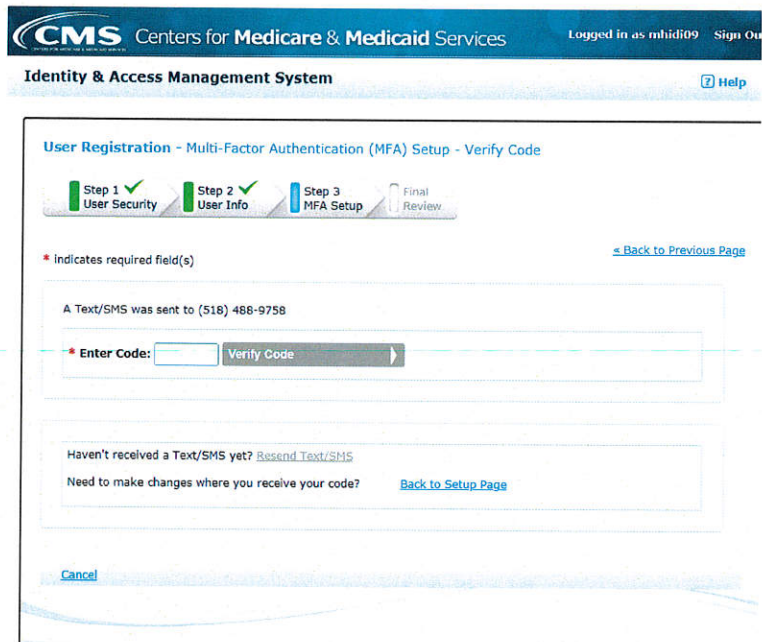
If you selected Phone Number Voice Call, you will see the following on the verification page

* indicates required field(s)

A call was made to (518) 488-9758

* **Enter Code:** [   ] **Verify Code** ▶

Haven't received a call yet? Call Again

Need to make changes where you receive your code?   **Back to Setup Page**
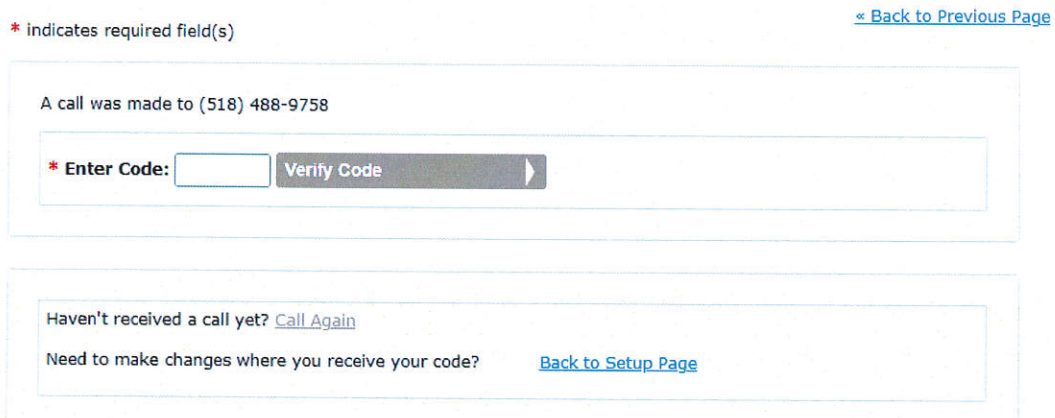
9. Your Primary MFA Method was successfully set up. You may now choose to either set up an alternative (second) method, or Complete your registration.
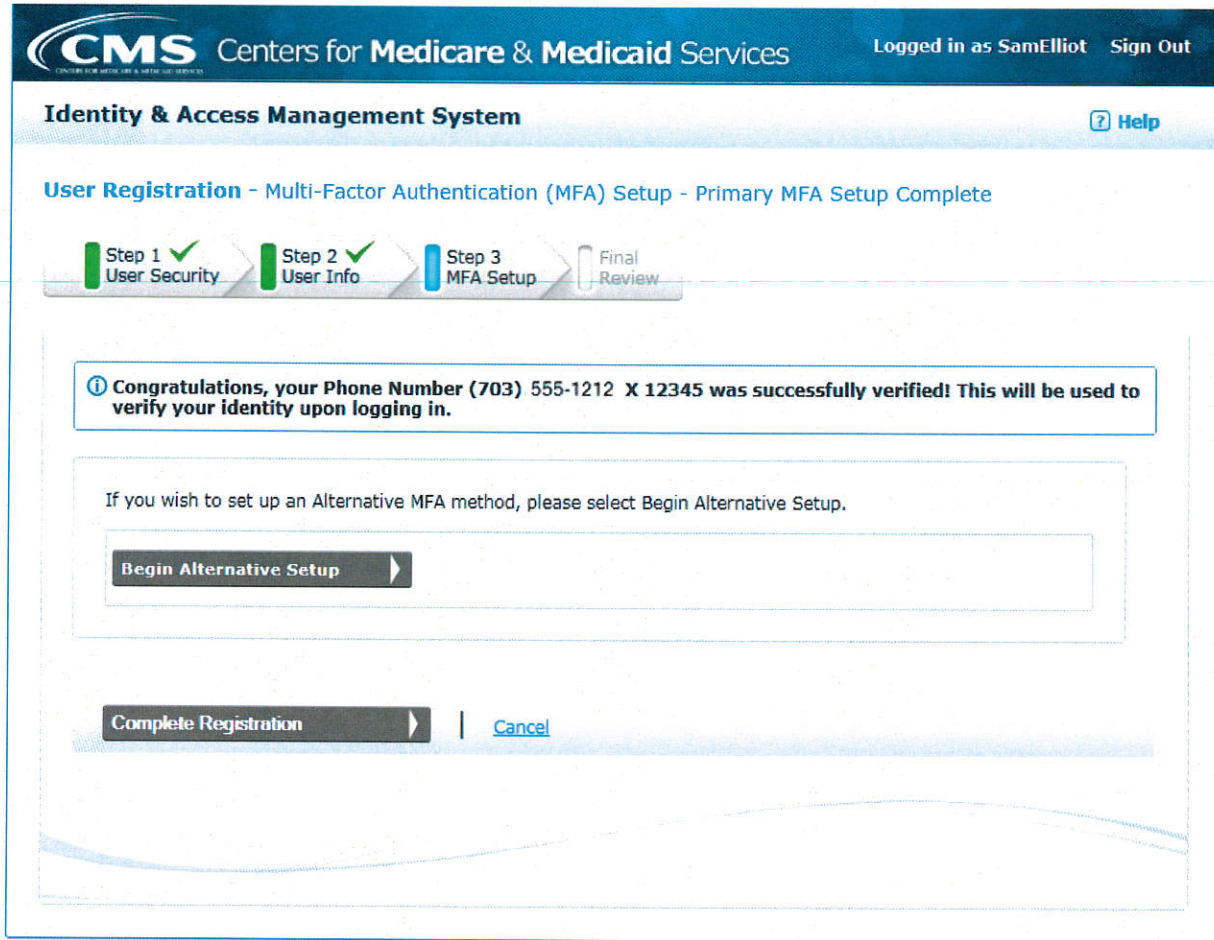
10. Your registration is complete, select the **Continue to Home page** button to be navigated to your I&A Home page.
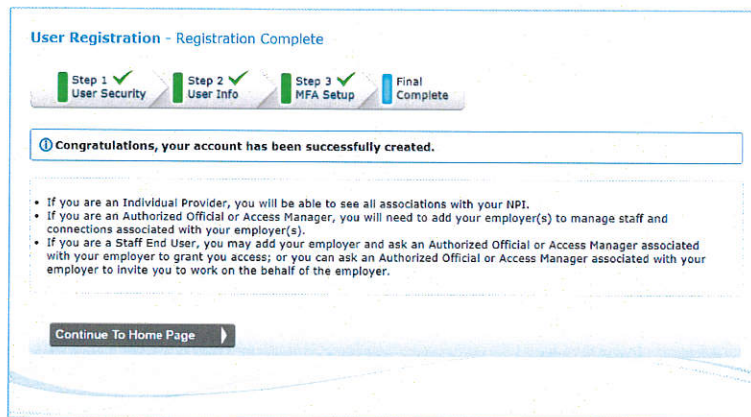
11. You have successfully created your I&A account.