


## **Examples - Setting Up Your Account and Gaining Provider Access**


### **Create Your Account**

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

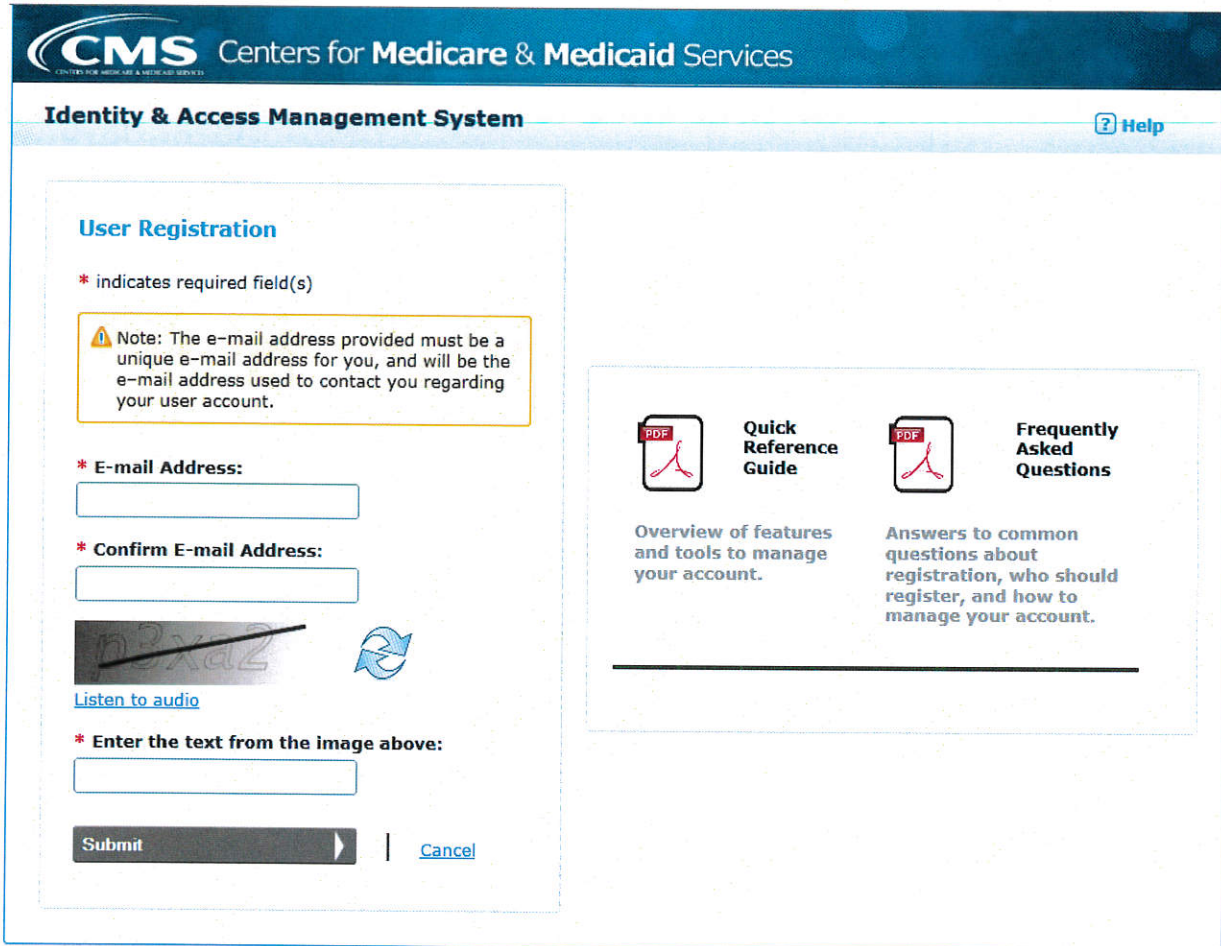
If you have received an Invitation E-mail containing a PIN and you already have an I&A account, follow the instructions in section *How an Existing I&A User Responds to a Staff End Users (SEU) or Access Manager (AM) Invitation Access Manager (AM)*.

1. select  button or select the [register](#) link on the I&A login page and you will be navigated to the User Registration page.



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



The screenshot shows the CMS Identity & Access Management System User Registration page. The header includes the CMS logo and the text "Centers for Medicare & Medicaid Services". Below the header, the page title "Identity & Access Management System" is displayed, along with a "Help" link. The main content area is titled "User Registration" and includes a note about email address requirements, input fields for "E-mail Address" and "Confirm E-mail Address", a CAPTCHA image with a "Listen to audio" link, and a "Submit" button. To the right, there are links to a "Quick Reference Guide" and "Frequently Asked Questions".

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### 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:

[Listen to audio](#)

\* Enter the text from the image above:

| [Cancel](#)

**Quick Reference Guide**  
Overview of features and tools to manage your account.

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

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

\* indicates required field(s)

**\* User ID:**

**\* Password:**

**\* Confirm Password:**

**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.

**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.

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

<b>* Question 1:</b> <input type="text" value="Select"/>	<b>* Answer 1:</b> <input type="text"/>
<b>* Question 2:</b> <input type="text" value="Select"/>	<b>* Answer 2:</b> <input type="text"/>
<b>* Question 3:</b> <input type="text" value="Select"/>	<b>* Answer 3:</b> <input type="text"/>
<b>* Question 4:</b> <input type="text" value="Select"/>	<b>* Answer 4:</b> <input type="text"/>
<b>* Question 5:</b> <input type="text" value="Select"/>	<b>* Answer 5:</b> <input type="text"/>

**Continue** | [Cancel](#)

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

**CMS** Centers for Medicare & Medicaid Services Logged in as SamElliot Sign Out

**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)

<p>* <b>First Name:</b> <input type="text"/></p> <p><b>Middle Name:</b> <input type="text"/></p> <p>* <b>Last Name:</b> <input type="text"/></p> <p><b>Suffix:</b> <input type="text"/></p> <p>* <b>Business Phone Number:</b> <input type="text"/></p> <p><b>Fax Number:</b> <input type="text"/></p> <p>* <b>Date of Birth: (MM/DD/YYYY)</b> <input type="text"/></p> <p>* <b>SSN:</b> <input type="text"/></p> <p><b>Primary E-mail Address:</b> sam.elliott@email.com</p>	<p>* <b>Personal Phone Number:</b> <input type="text"/></p> <p>* <b>Home Address Line 1:</b> <input type="text"/></p> <p><b>Home Address Line 2:</b> <input type="text"/></p> <p>* <b>City:</b> <input type="text"/></p> <p>* <b>Country:</b> United States <input type="text"/></p> <p>* <b>State/ Province/ Territory:</b> SE - Select One <input type="text"/></p> <p>* <b>Postal/ZIP Code:</b> <input type="text"/></p>
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| [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**

- 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**.

**CMS** Centers for Medicare & Medicaid Services Logged in as SamElliot Sign Out

### 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

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\* indicates required field(s)

**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](#)

\* **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.

The screenshot shows the 'User Registration - Multi-Factor Authentication (MFA) Setup' page. At the top, the CMS logo and 'Centers for Medicare & Medicaid Services' are displayed, along with the user 'SamElliot' and a 'Sign Out' link. The page title is 'Identity & Access Management System' with a 'Help' icon. A progress bar indicates four steps: Step 1 (User Security), Step 2 (User Info), Step 3 (MFA Setup), and Final Review. A 'Back to Previous Page' link is in the top right. A note states '\* indicates required field(s)'. The main content area contains instructions on how to receive a verification code (via phone or email) and requires selecting a 'Multi-Factor Authentication Method'. A dropdown menu is set to 'E-mail Address'. Below this, there is a text field for the email address, which is pre-populated with 'sam.elliott@email.com'. At the bottom, there are 'Send E-mail' and 'Cancel' buttons.

**CMS** Centers for Medicare & Medicaid Services Logged in as SamElliot Sign Out

**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

[« Back to Previous Page](#)

\* indicates required field(s)

**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.elliott@email.com

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

| [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

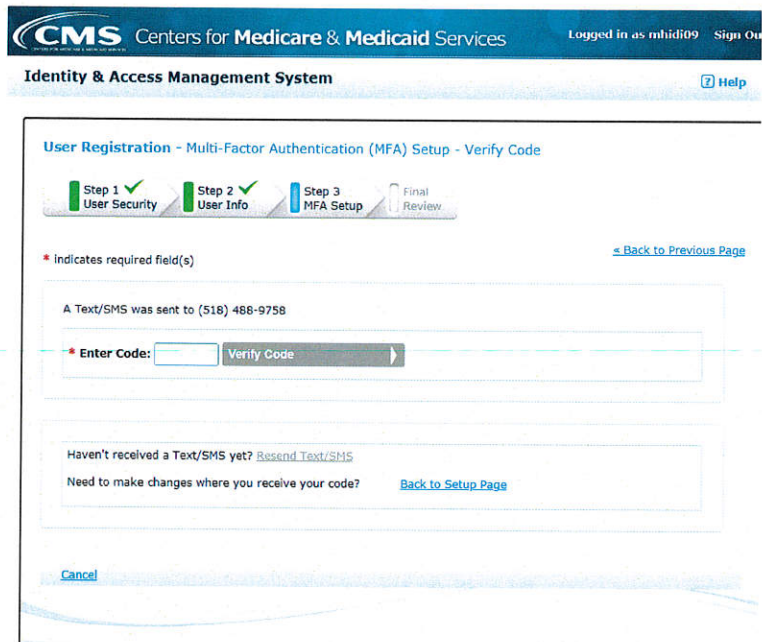
Call | Cancel



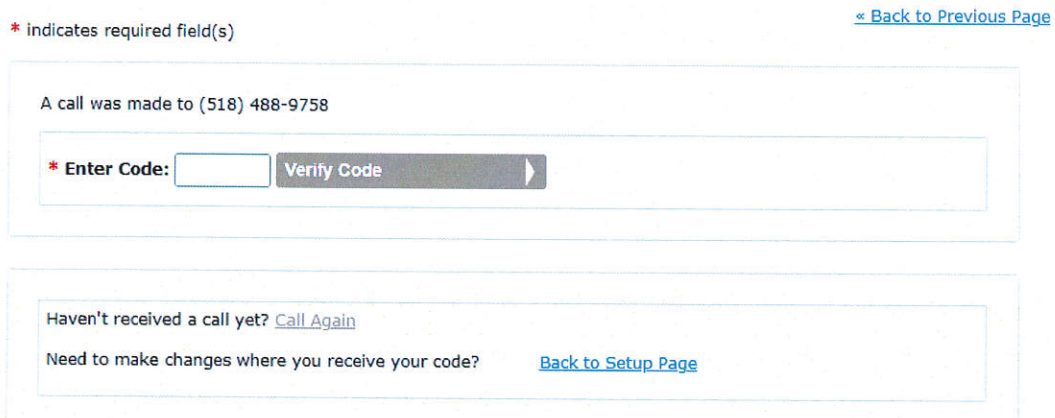
8. Enter the code you receive and select **Verify Code**.  
If for some reason you do not receive a code, select the link (**Resend E-mail, Resend Text/SMS or Call Again**) to have a new code sent to you. If you need to change your method or update your e-mail address (Phone Number, if you selected Text/SMS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

The screenshot shows the 'User Registration - Multi-Factor Authentication (MFA) Setup - Verify Code' page. At the top, the CMS logo and 'Centers for Medicare & Medicaid Services' are visible, along with the user's login information 'Logged in as mehdi404' and a 'Sign Out' link. The page title is 'Identity & Access Management System' with a 'Help' icon. A progress bar indicates four steps: Step 1 User Security (completed), Step 2 User Info (completed), Step 3 MFA Setup (current step), and Final Review. A message states 'An E-mail was sent to mhidi06@gmail.com'. Below this is a form with a required field '\* Enter Code:' and a 'Verify Code' button. There are also links for 'Resend E-mail' and 'Back to Setup Page'. A 'Cancel' link is at the bottom left.

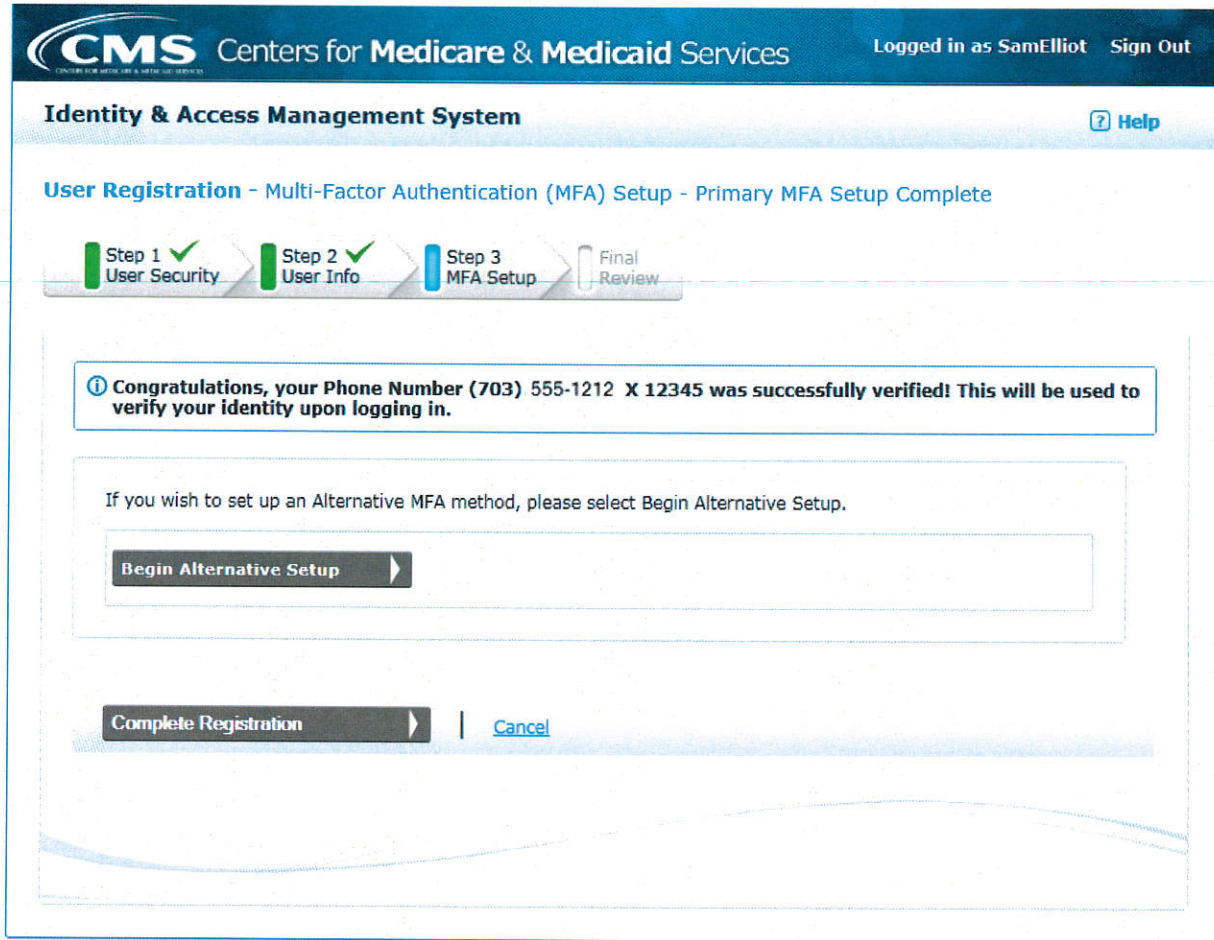
If you selected Phone Number Text/SMS, you will see the following on the verification page



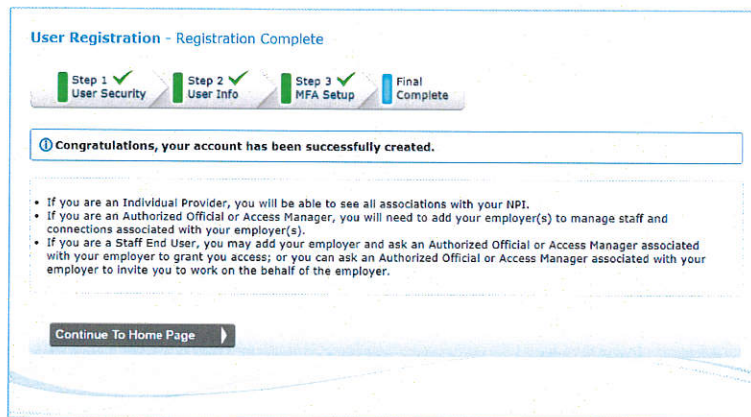
If you selected Phone Number Voice Call, you will see the following on the verification page



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.

The screenshot shows the homepage of the Identity & Access Management System. At the top, there is a header for CMS Centers for Medicare & Medicaid Services, with a user logged in as 'Admin01' and a 'Sign Out' link. Below the header is the system title 'Identity & Access Management System' and a 'Help' icon. The main content area is divided into three tabs: 'Home', 'My Profile', and 'My Connections'. The 'Home' tab is active, displaying a welcome message: 'Welcome to the Identity and Access Management System!'. Below this, there are three registration options: 'Are you an Individual Provider?', 'Are you responsible for an Organization?', and 'None of above?'. Each option has a brief description of the user type and instructions on how to proceed. To the right of the main content, there is a 'News & Alerts' section with 'EUS Contact Information' (External User Services) and an 'Application Links' section with links to 'NPDES', 'PECOS', and 'EHR Incentive Programs'. At the bottom of the page, there are two document icons: 'Quick Reference Guide' and 'Frequently Asked Questions', both with PDF icons.