OTCnet User Support Job Aid

Create An OTCnet Account Through ID.me

1. To create an **OTCnet account**, navigate to the OTCnet login page (https://otcnet.for.fiscal.treasury.gov). (See Figure 1.)

Figure 1: OTCnet Login Screen

a. If you already have an **ID.me** account, simply enter your associated email address and password, then select **Sign In**. Even though you have an account, you will be asked to verify your identity by entering your **one-time identification code** received via mobile phone or email.

b. If you do not have an **ID.me** account, select **Create an ID.me account** link (as seen in Figure 2) and follow the prompts to setup the account. Continue to Step 3.

Figure 2: ID.me Sign in Page
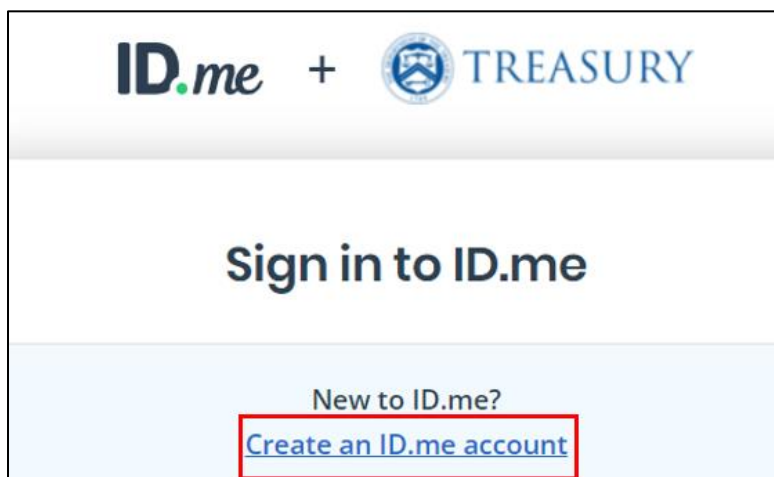
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> **💡 Application Tip**
>
> - It is important for those users without **PIV/CAC** credentials to make their **OTCnet email address** the **default** email address in their **ID.me** account so that they can authenticate in OTCnet.

2. Enter the **email address** you want to use for your account, enter a **password** for **ID.me**, accept the terms of service, and select **Create account**. See Figure 3 below.

Figure 3: ID.me Creation Page

> **💡 Application Tip**
>
> If you create an account with your **personal email,** make sure to also provide your **organization's email address** associated with your OTCnet account to ensure that OTCnet will recognize your identity when you login to the application.

3. After selecting **Create Account**, the page will refresh, and you will receive an email with a **6-digit code** to verify your account. Figure 4 shows the page once it is refreshed.

Figure 4: ID.me Email Sent Page
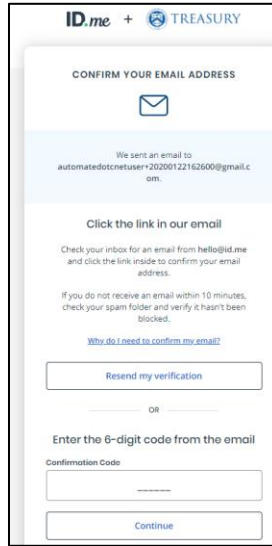
4. Log in to your email and open the recent email from **ID.me** with an email confirmation link and a unique **6-digit code**. Figure 5 illustrates the email received with a sample code. You can either select the **Confirm Email** button or return to the browser and enter the **code** in the bottom portion of the screen (see Figure 5).

Figure 5: ID.me Verification Email
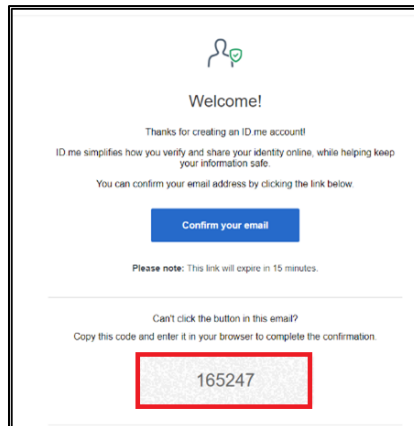
5. If the **Confirm Email** link is selected, (A) will appear before the original browser tab updates to the **Secure Your Account** Multi Factor Authentication (MFA) option page. If you entered the code on the screen shown in Figure 4 and selected **Continue** in the browser, the **Secure Your Account** Multi Factor Authentication (MFA) option page appears. Select your preferred method. Figure 6 (B) shows all the MFA options of Step 1 of Secure Your Account.
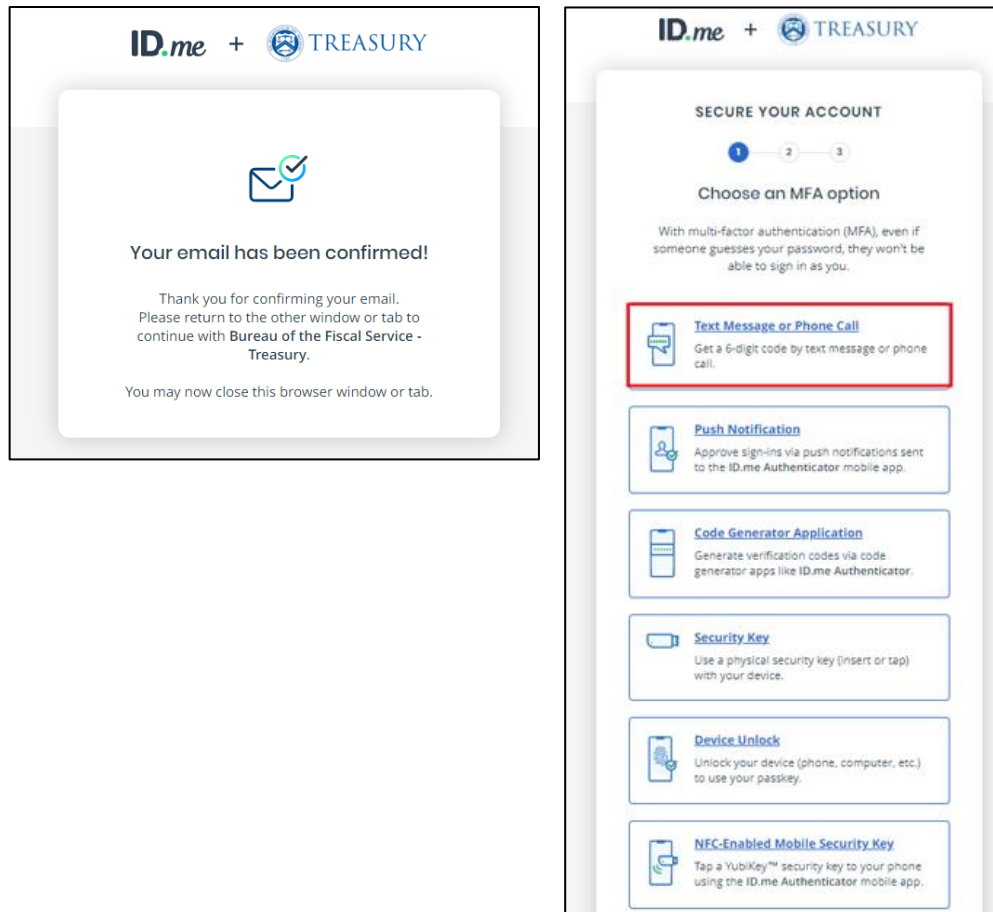
💡 **Application Tip**

- For users, any MFA method is available, but the authenticator app solutions are more secure than Text Message (SMS) or Phone Call options.
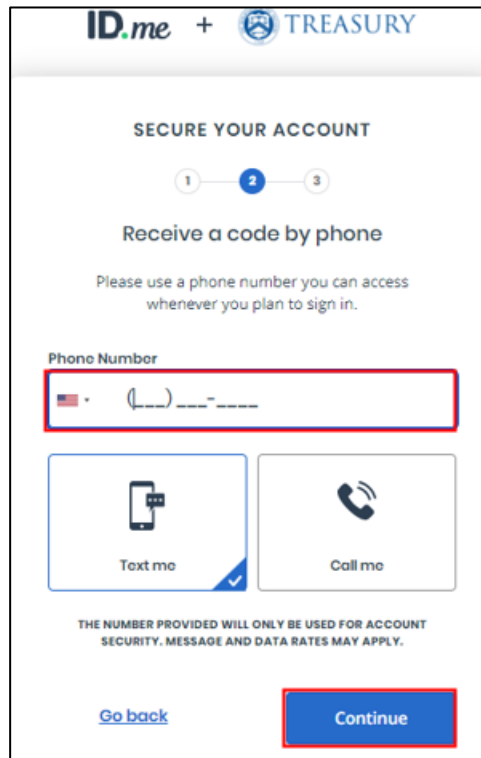
Figure 6 (A and B): ID.me Email Confirmation and Secure Your Account Step 1 Screen

6. For this example, **Text Message** or **Phone Call** is selected. The second screen of **Secure Your Account** appears. Enter your **mobile phone number** and select **Continue**.

Figure 7: ID.me Secure Your Account Step 2 Screen
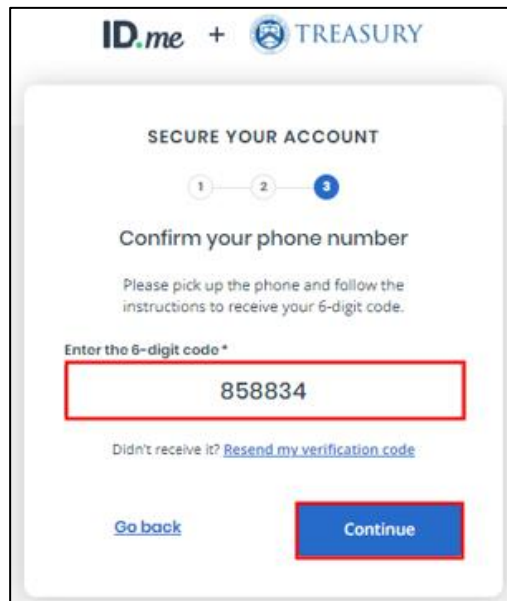
7. The webpage will refresh to the **Confirm your phone number** screen. Go to your **mobile device** to receive the code. Enter the **code** that was sent to your device and select **Continue,** as shown in Figure 8.

Figure 8: ID.me Secure Your Account Step 3 Screen

8. The webpage will refresh to the **Your Account is Now Secure** page. Here, select **Generate Recovery Code.** See Figure 9 (A). Your new code will appear. Figure 9 (B) and shows an example recovery code. Write this code down, or download a copy, then select **Continue**.

Figure 9 (A and B): ID.me Recovery Code Screen and Secure Your Account
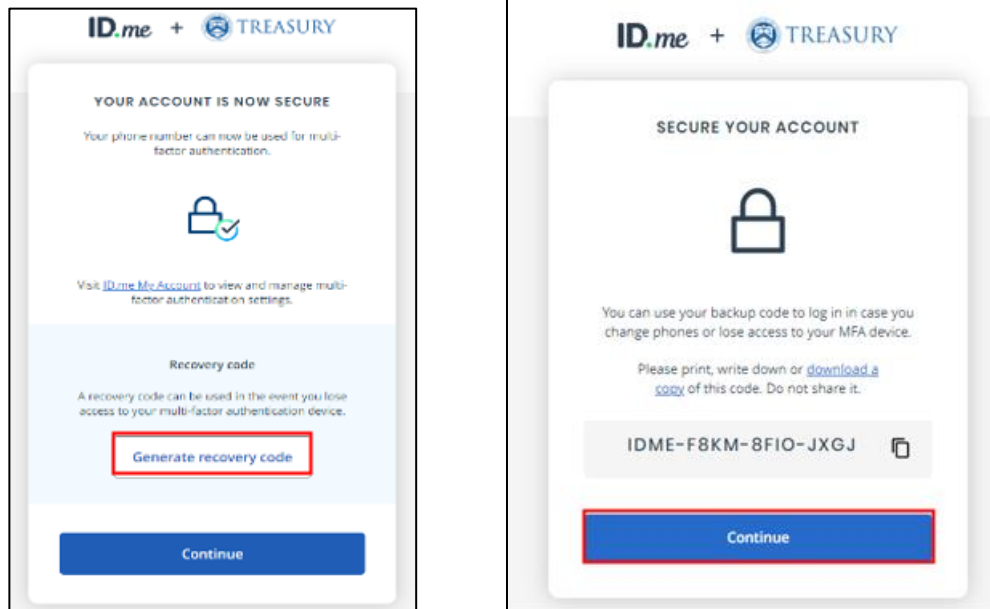
9. Next, you will be taken to the beginning of verifying your identity. Select a **verification method** among the options provided in Figure 10 to upload a document.
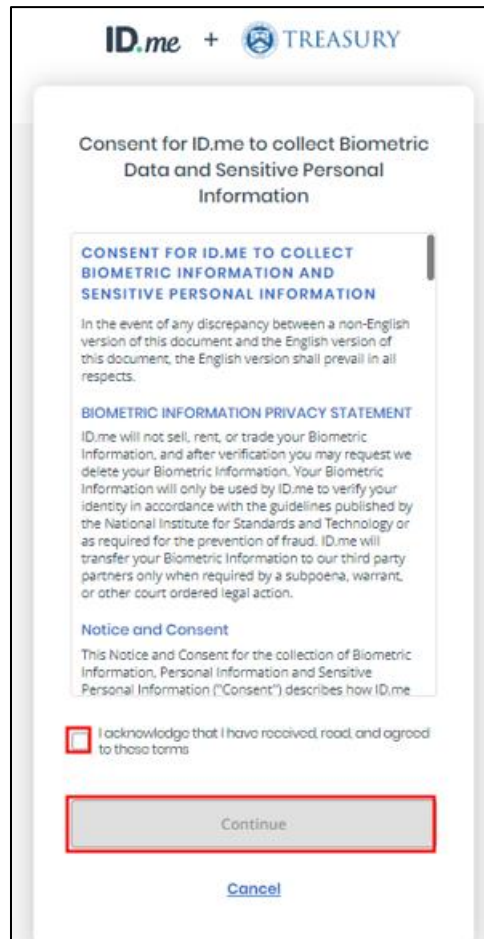
Figure 10: ID.me Verify Your Identity Option Screen
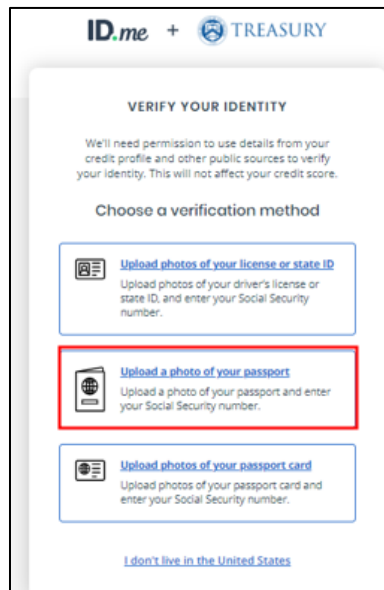
10. After selecting an option to upload your document with, you will then be brought to a consent screen regarding **ID.me**'s use of your personal information. Figure 11 is what the beginning of the terms looks like. Select the "**I acknowledge**…" check box and select **Continue**.

<p style="text-align:center">**Figure 11: ID.me Consent Screen**</p>

11. Once continue is selected, you will be brought to the first screen of the **Verify Your Identity** section. Here you have the options on how to submit photos of your selected document (in our example, see Figure 10, we selected Passport). For our example, we will select the "**I don't have a smartphone**" link in Figure 12.

Figure 12: ID.me Verify Your Identity Step 1
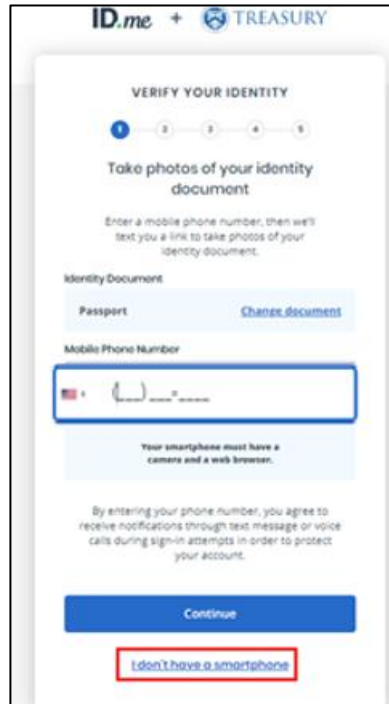
12. In the first of the upload screens of **Verify Your Identity**, select the "**Upload photo**…" link in the middle of Figure 13 (A). In Figure 13 (B), upload a **photo** of your selected document in .jpeg format and confirm that all the necessary information is clearly legible. Select **Continue** once the photo is uploaded.

Figure 13 (A and B): ID.me Photo Upload Screens
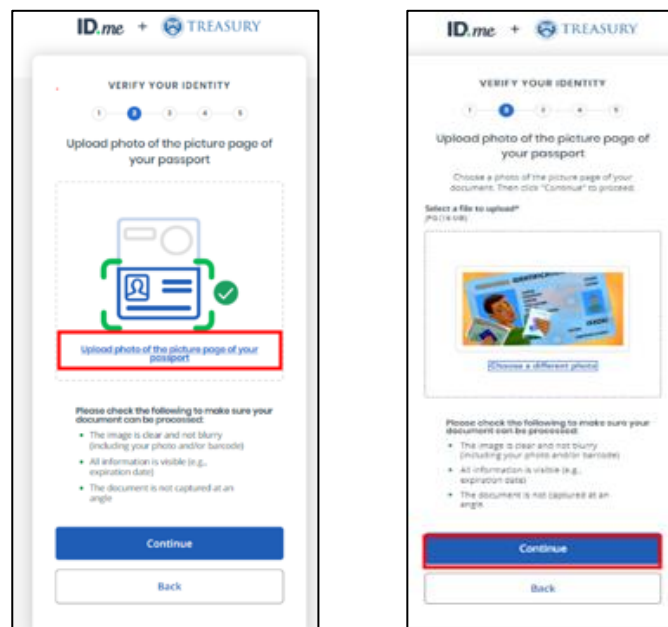
13. The second stage of **Verify Your Identity** will have you take a picture of your face with either your Smartphone camera or your webcam on your computer. Once a method is selected (Figure 14 A), you will be prompted to **take a photo**. Via a Webcam, make sure you allow Camera access and select **Snap Photo** (Figure 14 B). Ensure the photo is clear and select **Continue** in Figure 14 (C)**.**
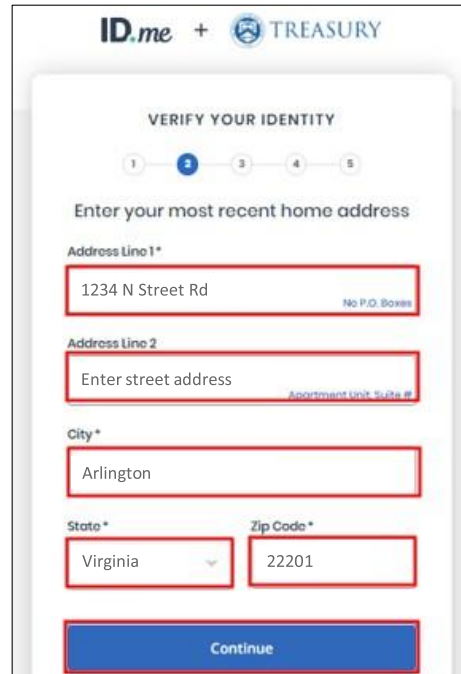
Figure 14 (A, B, and C): ID.me Verify Your Identity Step 2
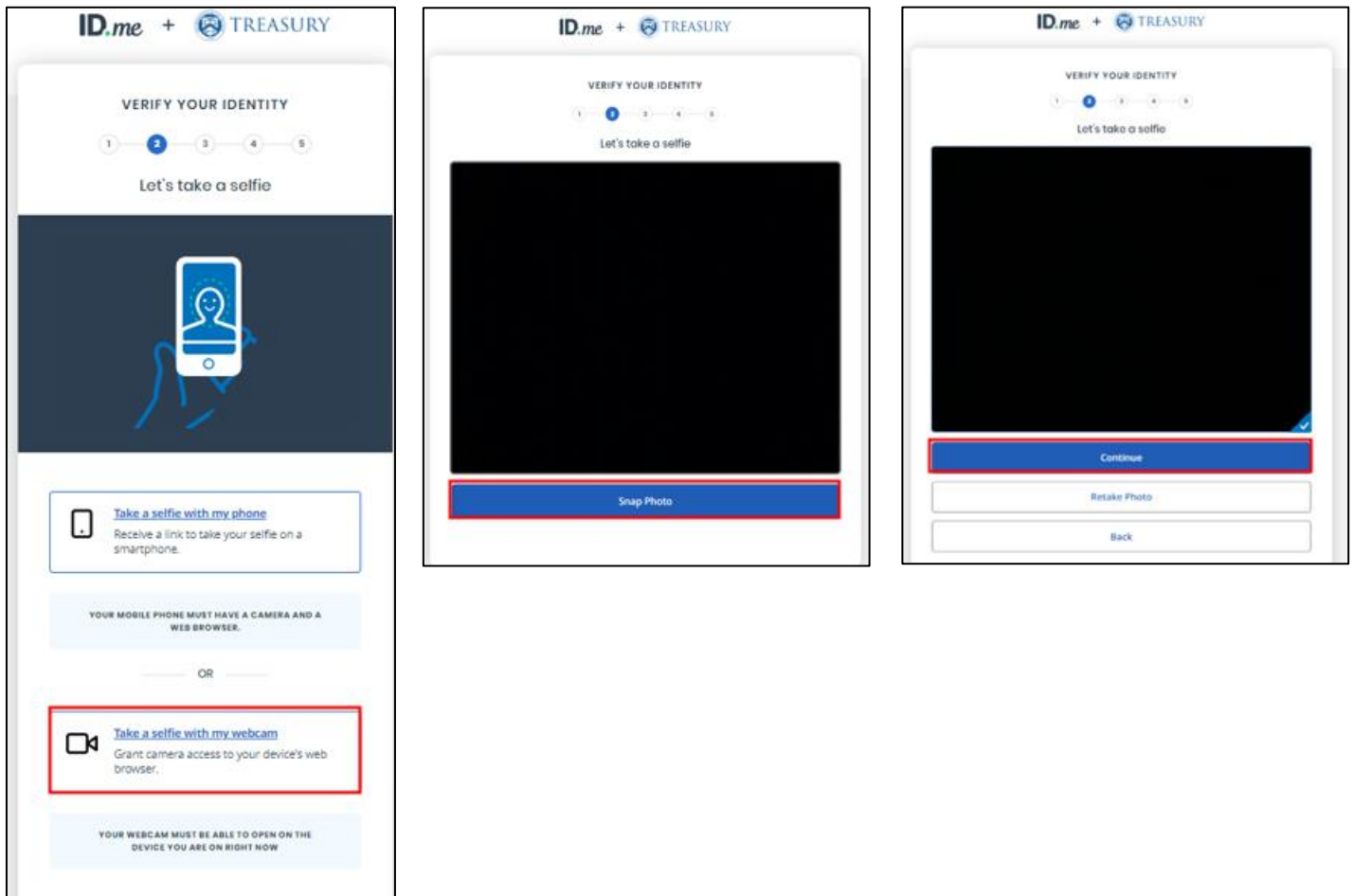
14. On the next page, enter **your most recent home address** and select **Continue**. (Note: If a different method is selected (i.e., Driver's license) you may not see this step).

Figure 15: ID.me Verify Your Identity Step 2

15. In Step 3 of **Verify Your Identity**, you will have to enter **your mobile phone number** and select **Continue**. Once **Continue** is selected in Figure 16 A, the screen will refresh and display a **Confirming Your Phone** screen (Figure 16 B).

Figure 16 (A and B): ID.me Verify Your Identity Step 3

16. After your phone number is confirmed, step 4 will ask you to enter your **Social Security Number**. Enter your **SSN** and select **Continue**.
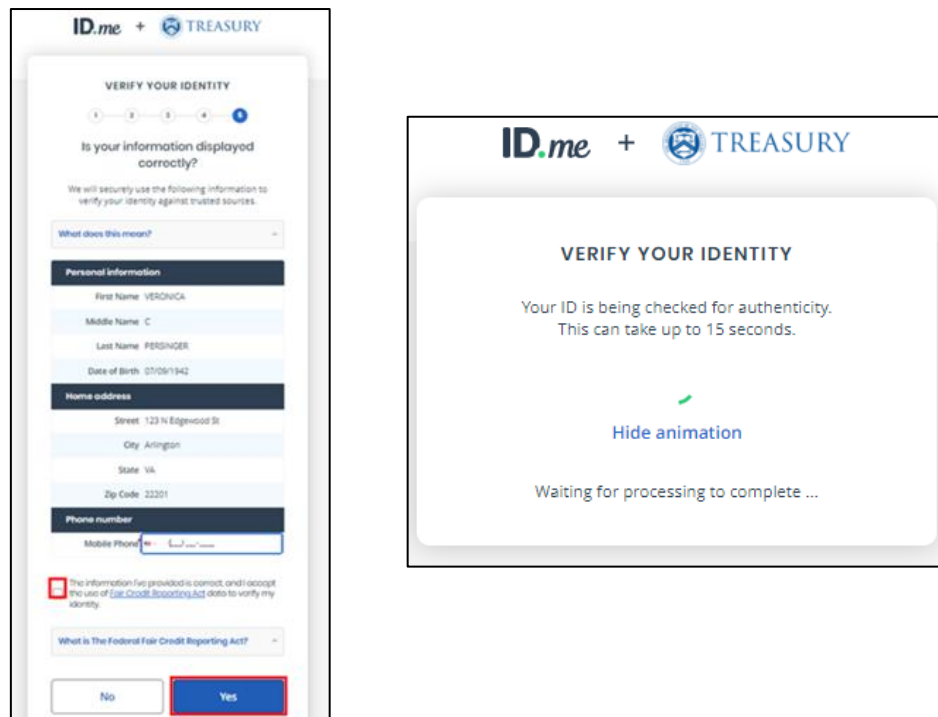
Figure 17: ID.me Verify Your Identity Step 4

17. The final step will be to verify the information you entered on the previous screens. Review all sections, check "**The Information I've provided is correct**…" checkbox and select **Yes** to continue (Figure 18 A). The screen will refresh, and the page will verify your identity.

**Figure 18 (A and B): ID.me Verify Your Identity Step 5**

18. Once your Identity is verified, you will be prompted to confirm your mobile phone number. Go to your mobile phone and follow the prompts on your phone to **confirm your phone number** and email ownership. Figure 19 illustrates the screen present while you confirm the necessary steps on your phone.

Figure 19: ID.me Verify Your Identity Final Phone Confirmation
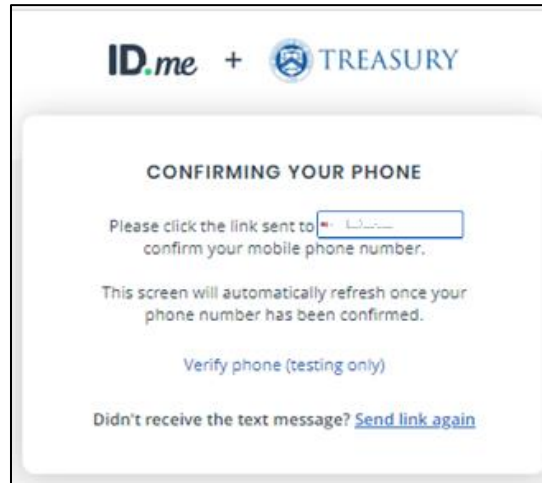
19. Once your phone is confirmed, the next screen will state that your Identity has been verified. To log in to **OTCnet** through **ID.me**, you will be asked if **ID.me** has your permission to share your verified information with Treasury. Select **Allow**. You will be able to adjust this later in your **ID.me** settings once connected. See Figure 20.

Figure 20: ID.me Share Information Authorization Screen
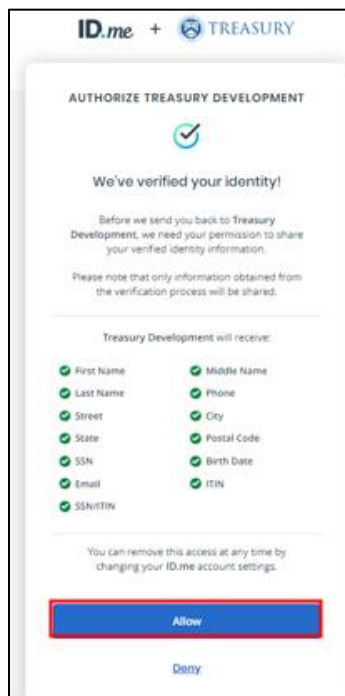
20. After selecting **Allow**, you will now be logged in to **OTCnet** with your **ID.me** account.

💡 **Application Tip**

- To log in to **OTCnet** in the future, simply select the **ID.me** option (as seen in Figure 1) and enter your **email address** and **password** for **ID.me**.

- You will be asked to verify your identity by entering your **one-time identification code** received via mobile phone or email.

Resources for User Help Support

If you need help with resetting your password and/or unlocking your account, refer to the following resources. The identity provider has a '**Forgot Password'** option for the user to reset their own password.

ID.me Support
- **Help Page** (no login is required): https://help.id.me/hc/en-us
  - Includes a chat bot
- **Help Center** (login is required): https://help.id.me/hc/en-us/p/contact_support
  - Includes a chat bot and an option to open a Help ticket