ID.me – Quick Start Guide

Thank you for your interest in the CERTS Grant Program. To access the CERTS Portal and submit an application to the Treasury Department, a company representative first must be registered with a username and password through the **ID.me** identity service. The company representative that registers with ID.me will be the point of contact to access the CERTS Portal to answer application questions, upload required documents, and perform other administrative functions in the portal. The company representative that registers with ID.me does not need to be a corporate officer.

What is ID.me?

ID.me is a **certified commercial identity provider** offering Identity Assurance Level (IAL) 2 and Authentication Assurance Level (AAL) 2 credentials. The requirements for credentials to access the CERTS Portal are defined by NIST SP 800-63 v3 (Digital Identity Guidelines).

No personally identifiable information will be retained by ID.me. Throughout the process, your information will remain completely secure. The process **does not** require a credit check.

How do I get an ID.me Username and Password?

Follow the steps below to receive a verified username and password. The entire process should take 5-10 minutes.

To get started, visit the **Treasury's ID.me Enrollment Page**.

Step 1: Enter your email and select a password	We recommend using the email address you will use in your CERTS application for the CERTS "point of contact" at your company.
Step 2: Set up two-factor authentication	We recommend using a cell phone, however other options are available.
Step 3: Verify your identity	Submit a picture of a government-issued photo ID. (If needed, you can call to verify your identity instead.)

When finished, you will receive a confirmation email allowing you to log in to Treasury's CERTS Portal with your new ID.me username and password.

What if I have questions?

Detailed enrollment instructions can be found in the following pages. For questions, please refer to the ID.me + Treasury Help Page or email CERTS@treasury.gov.

CERTS Portal

Detailed Instructions to Create an ID.me Account

June 2021

Step 1: Launch Website & Sign Up

This document outlines the process for obtaining an **ID.me credential** to **verify your identify**, as defined by NIST SP 800-63 v3, Digital Identity Guidelines. ID.me is a certified commercial identity provider offering Identity Assurance Level (IAL) 2 and Authentication Assurance Level (AAL) 2 credential.

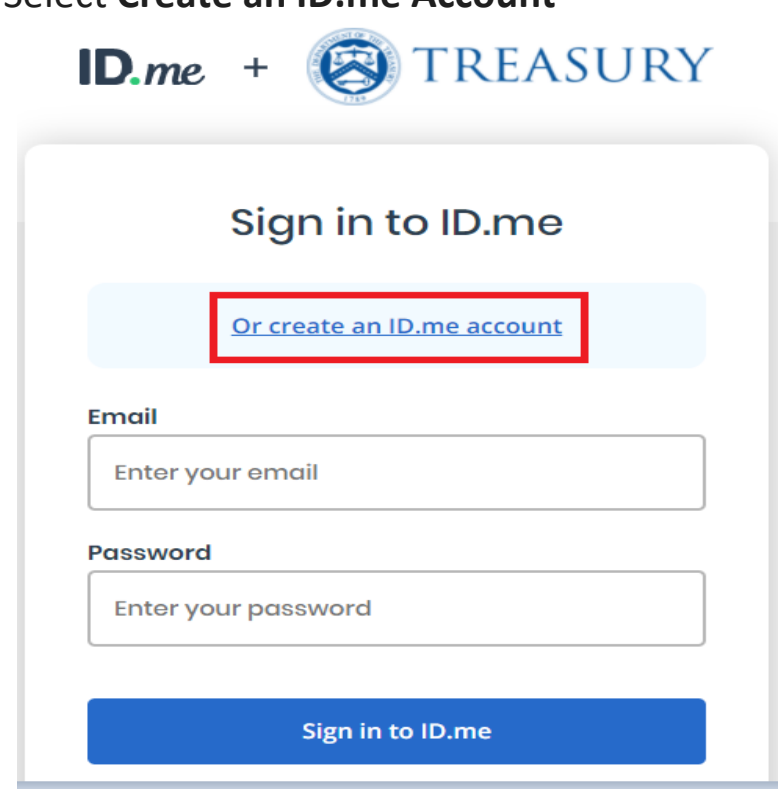
To access the CERTS Portal, all companies must have a representative registered with credentials issued through ID.me. The role of the ID.me registrant is to complete the CERTS application, upload required documents, and perform other administrative functions in the portal as part of the grant process. The ID.me registrant does not need to be a corporate officer, but can be a corporate officer. ID.me ensures Treasury knows the person accessing a government system.

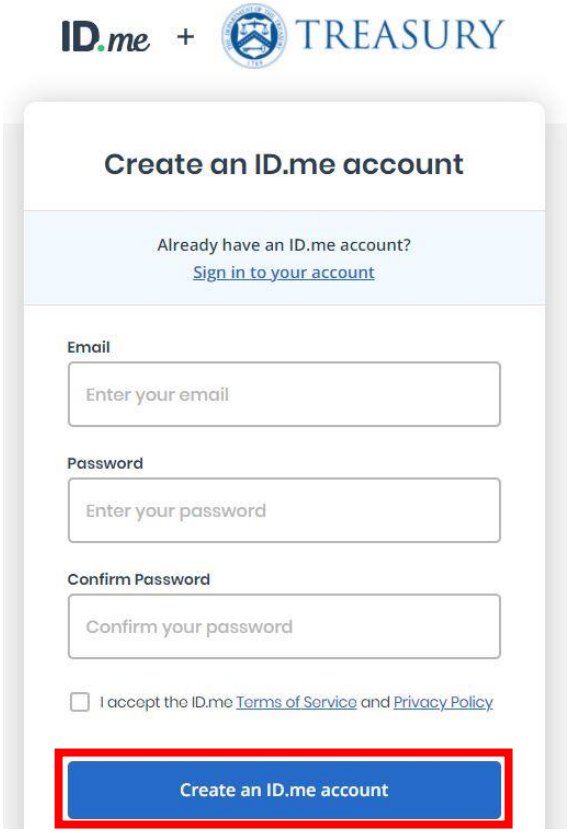
Contents:

- Four-step process to register for an ID.me credential:
  1. Launch Website & Sign Up (Slide 2)
  2. Email Verification (Slide 3)
  3. Two Factor Authentication Verification (Slides 4-5)
  4. Identity Verification (Slides 6-28)
     - Option 1: Upload photos of your license or State ID (Slides 8-15)
     - Option 2: Virtual in-person identity proofing (Slides 16-28)
- Logging on to CERTS Portal once ID.me registration is complete (Slide 29)

Step 1: Launch Website & Sign Up

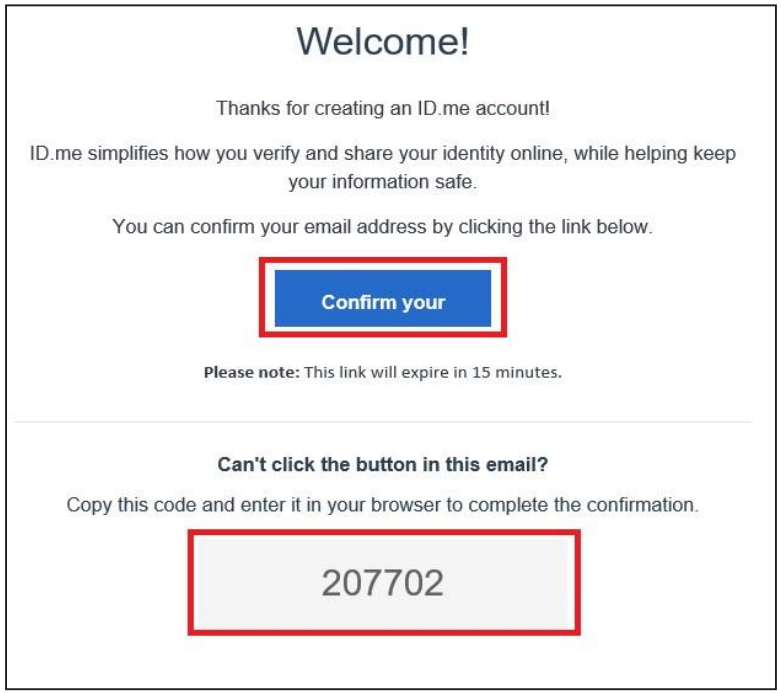
- Click the following link: https://portal.treasury.gov/cares/s/certs
  - *We recommend using Google Chrome for the best site performance*
- Select Create an ID.me Account
- Input your email address and create a password
  - Check box to accept terms of service and privacy policy
  - Select **Create an ID.me Account**

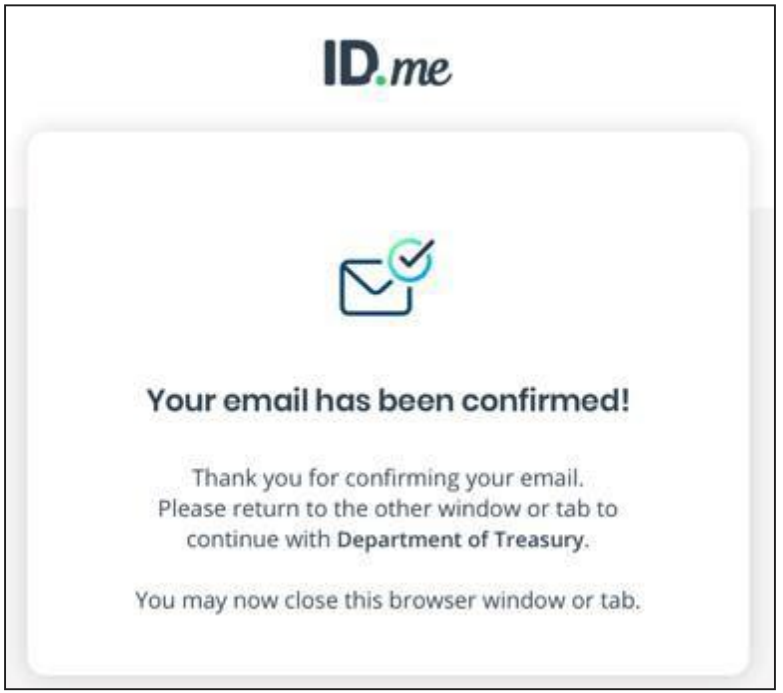




Step 2: Email Verification

- ID.me will send a verification email with a 6-digit code
  - Note that the confirmation code will **expire** after 15 minutes
- Select **Confirm Your Email** in the email message, and you will see a confirmation notice

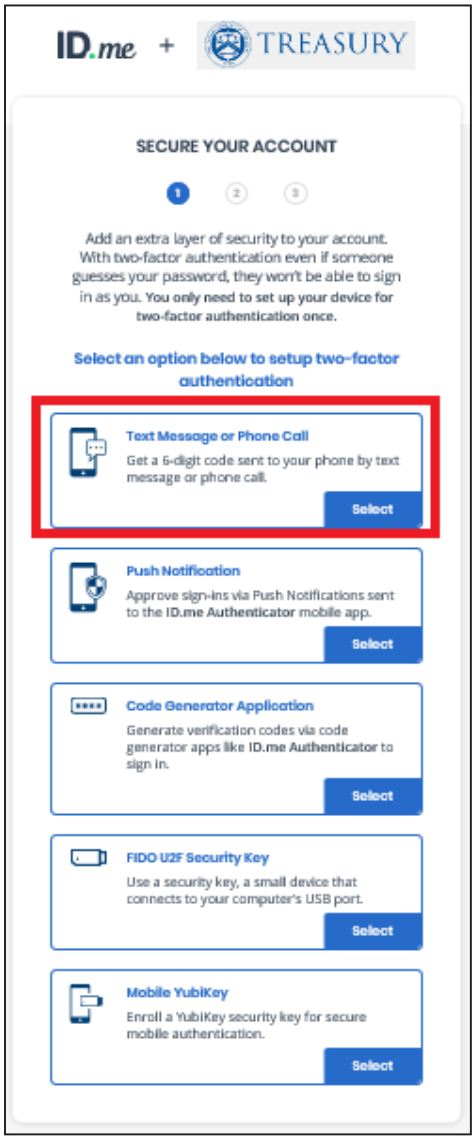




Step 3: Two-Factor Authentication

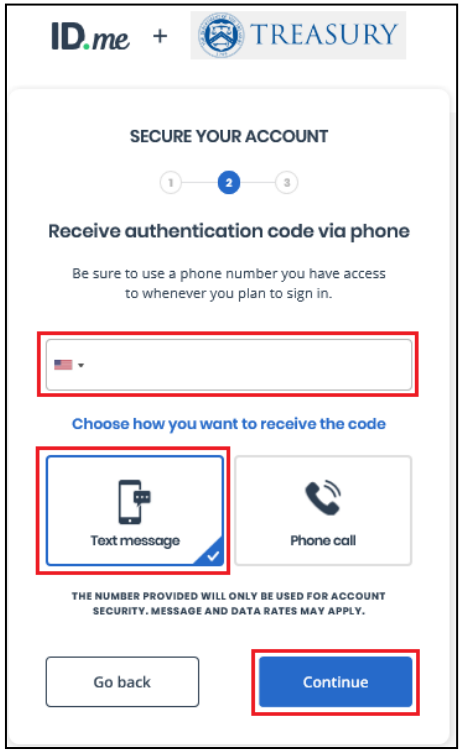
- Select one of the options to set up two-factor authentication:
  - Text Message or Phone Call **(Preferred)**
  - Push Notification
  - Code Generator Application
  - FIDO U2F Security Key
  - Mobile Yubikey

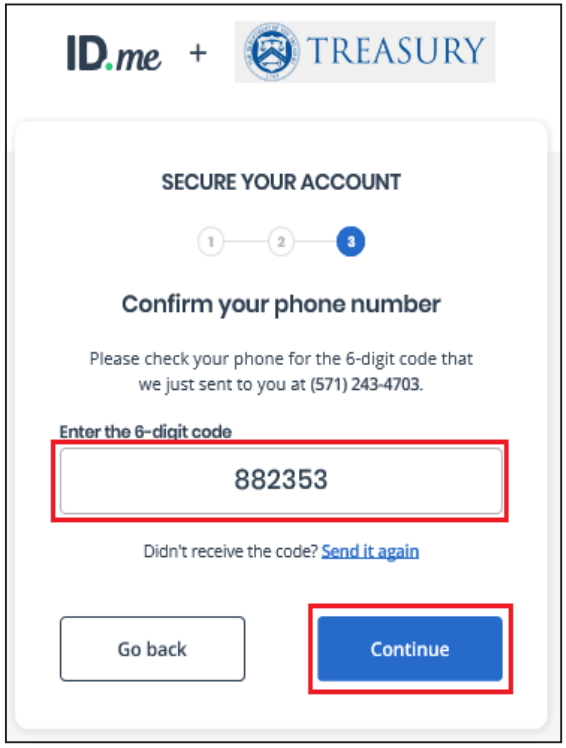
- **This document will walk through the first option: Text Message or Phone Call**



Step 3: Two-Factor Authentication

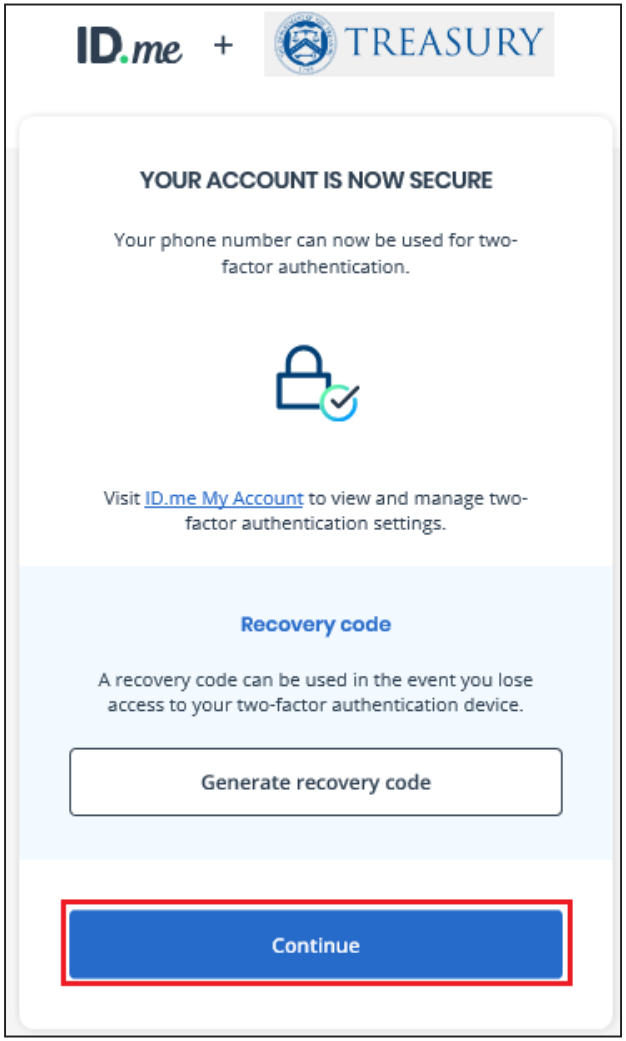
- Provide your information
  - Enter **your phone number**
  - Select **Text message**
  - Select **Continue**
    - You will receive a text message with a verification code
- Verify phone number
  - Enter the 6-digit verification code from the text message sent to your phone
  - Select **Continue**





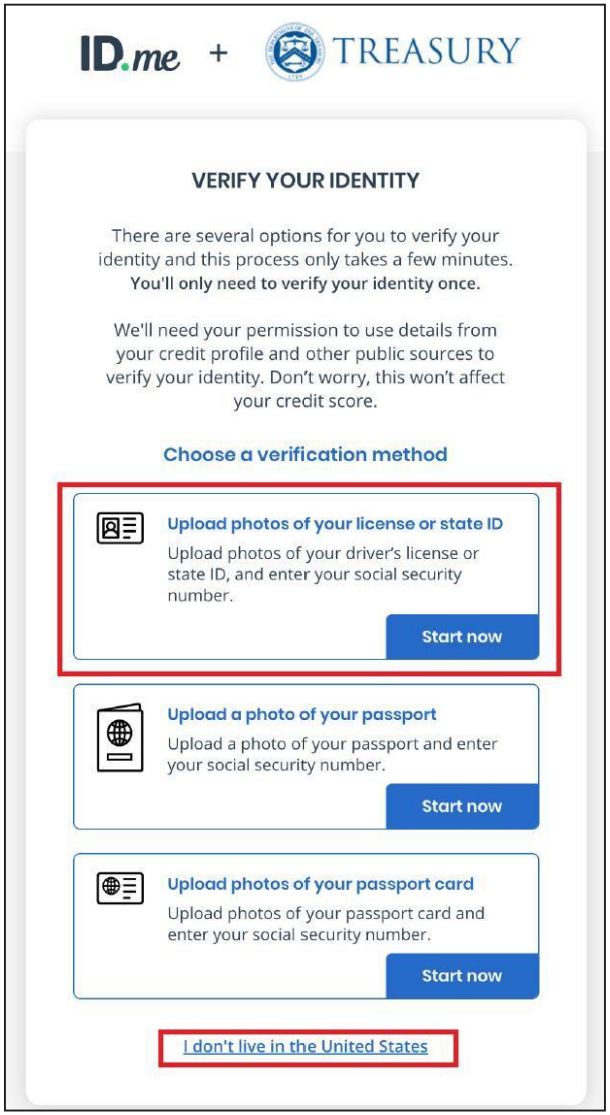
Step 4: Identify Verification

- **Congratulations!** You have enabled two factor authentication for your account.
- ID.me will send you an email notification that you enabled two-factor authentication.



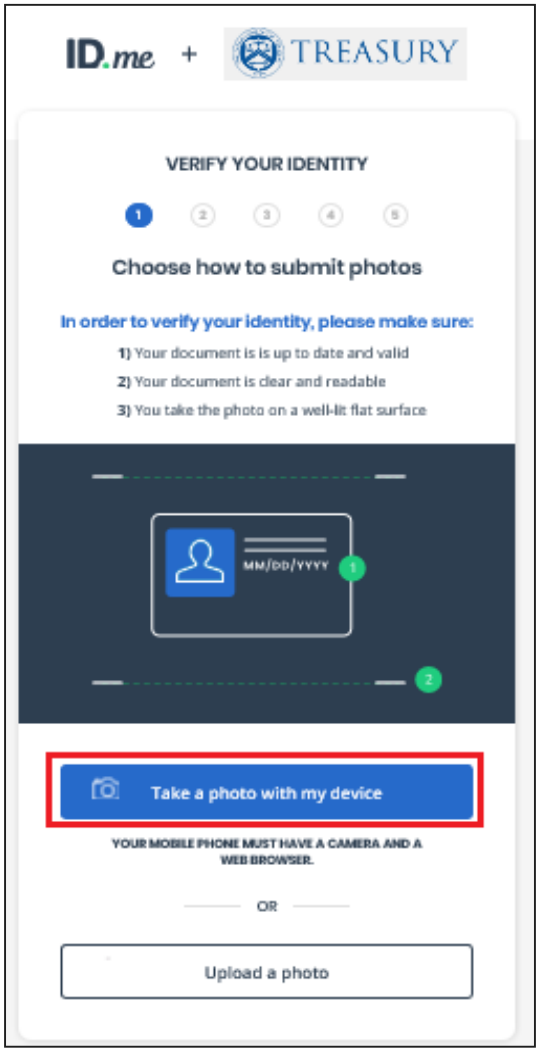
Step 4: Identify Verification

- Choose a method to verify your identity
  - Option 1:
    - Upload photos of your license or state ID (**Preferred**)
    - Upload a photo of your passport
    - Upload a photo of your passport card
    - ***Note** – you must use an active and valid license, state ID, or passport
  - Option 2:
    - Go directly to **Slide 16** if you don't live in the United States (**International**) to use the virtual in-person option



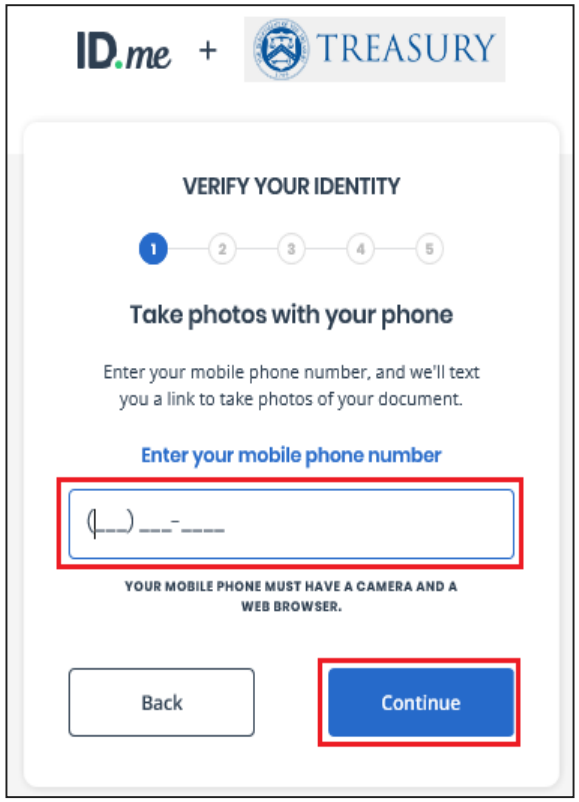
Option 1: Upload Photos of Your License or State ID

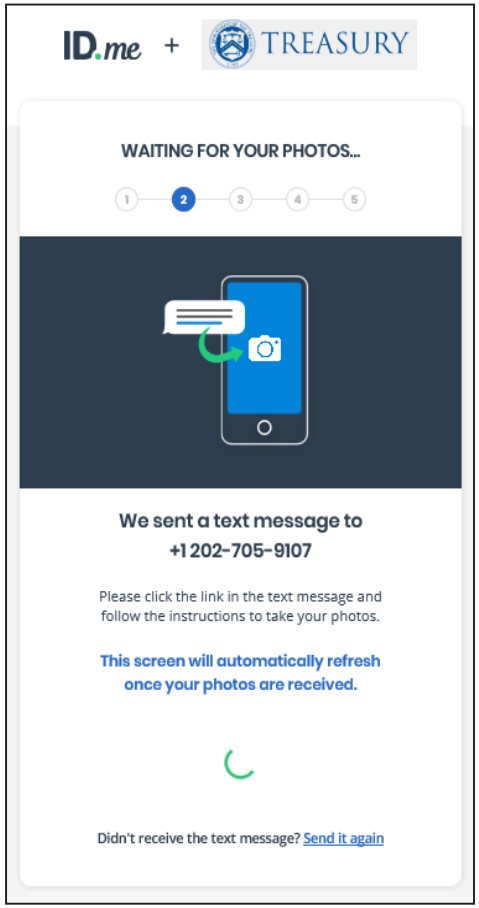
- **Step 1**
  - Check the box acknowledging Biometric Consent and press **Continue**
  - Choose how you would like to submit photos:
    - Take a photo with my device
    - Upload a photo



Option 1: Upload Photos of Your License or State ID

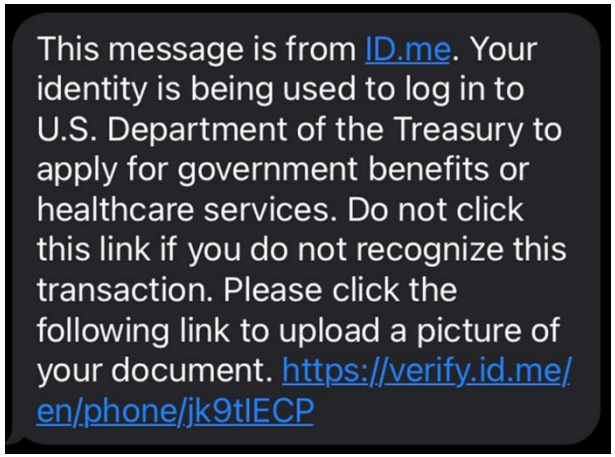
- **Step 1 (continued)**
  - Enter **your phone number**
  - Select Continue – a text message will be sent to your phone

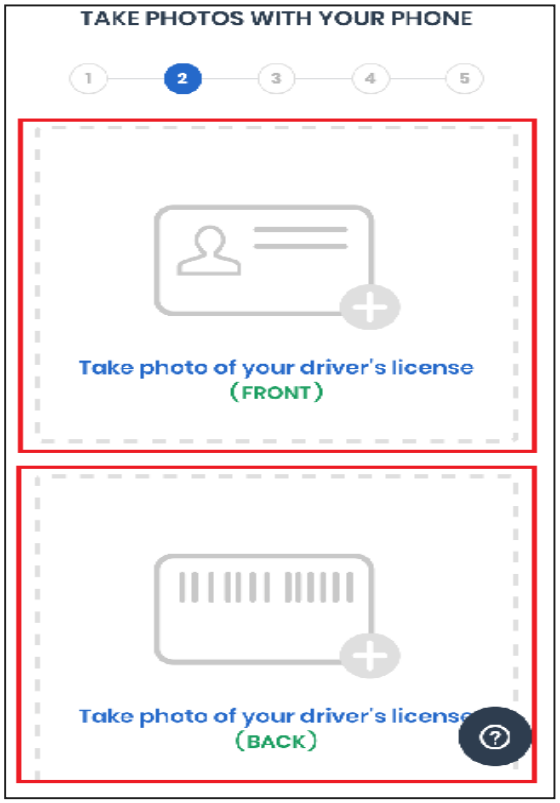




Option 1: Upload Photos of Your License or State ID

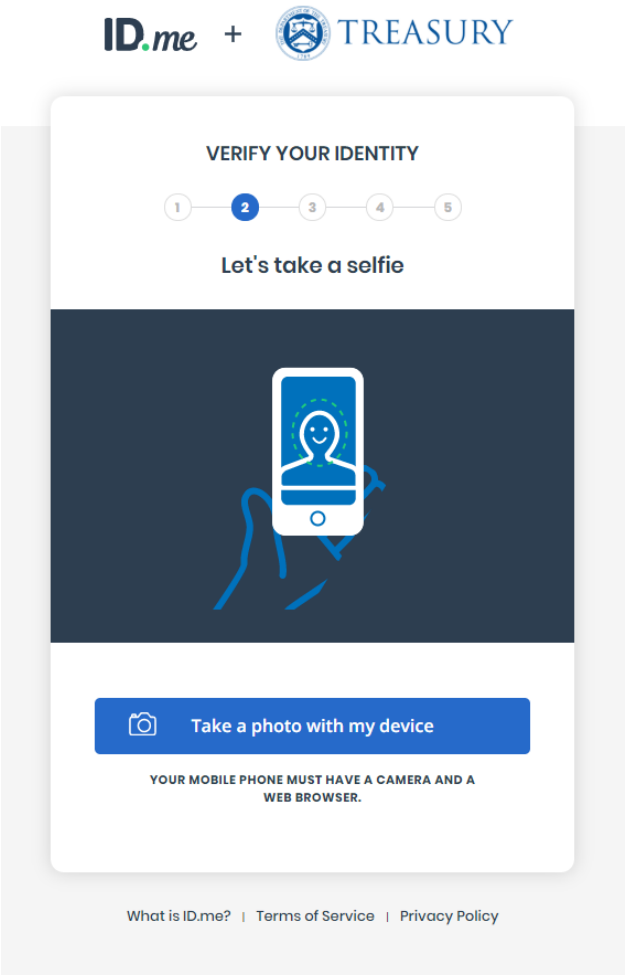
- **Step 2**
  - Select the link that was sent via text
  - **NOTE:** This link expires after **5 minutes**
  - Upload a picture of the front and back of your photo ID





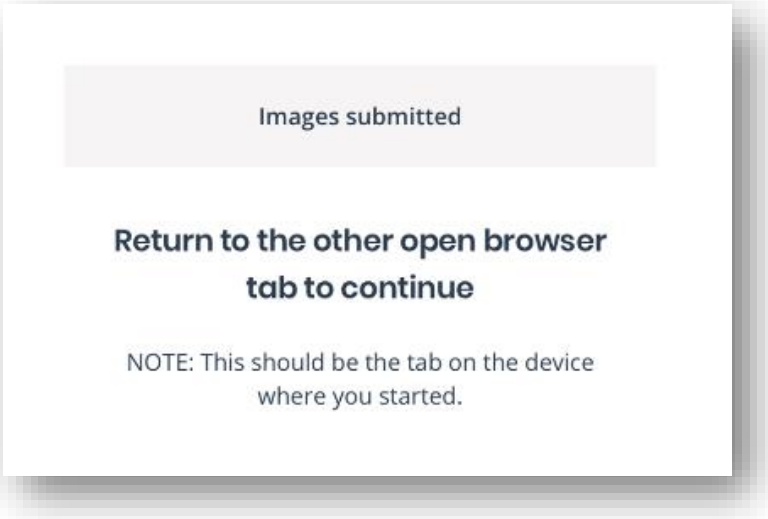
Option 1: Upload Photos of Your License or State ID

- **Step 3**
  - Upload a selfie or face scan using the camera on your mobile device
  - Once uploaded, ID.me will verify your identity automatically
    - If ID.me cannot verify your information from your license, you will need to input your data manually



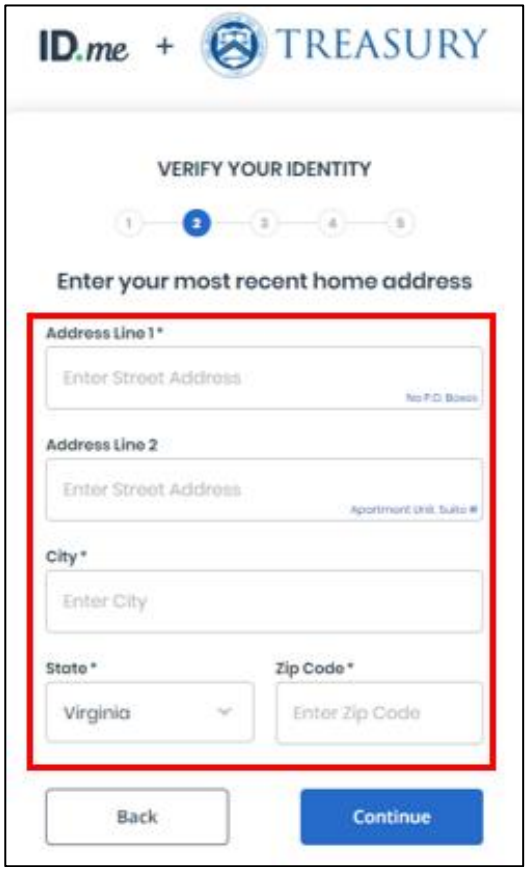
Option 1: Upload Photos of Your License or State ID

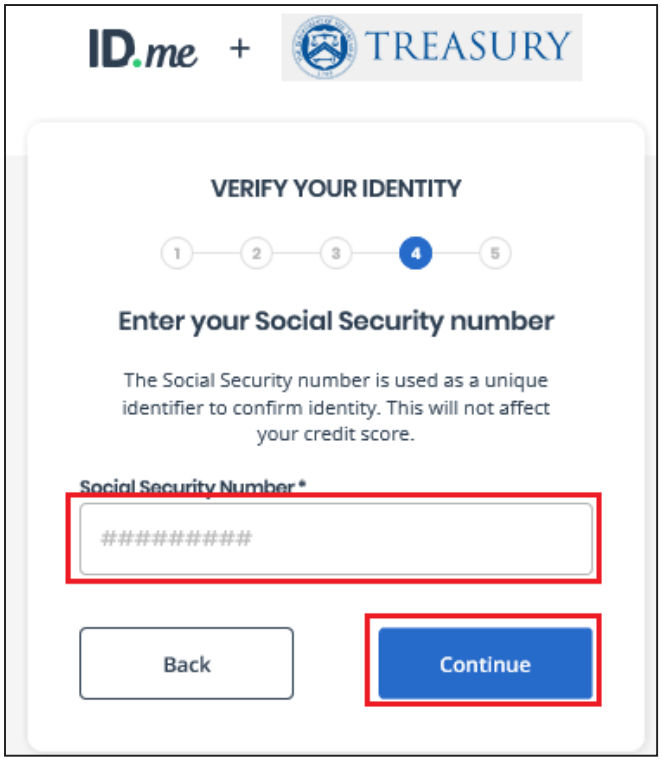
- **Step 3 (continued)**
  - Once you have uploaded your ID photos and completed your face scan, you will see the “images submitted” message.
  - Next, return to the browser where you started creating your ID.me account.



Option 1: Upload Photos of Your License or State ID

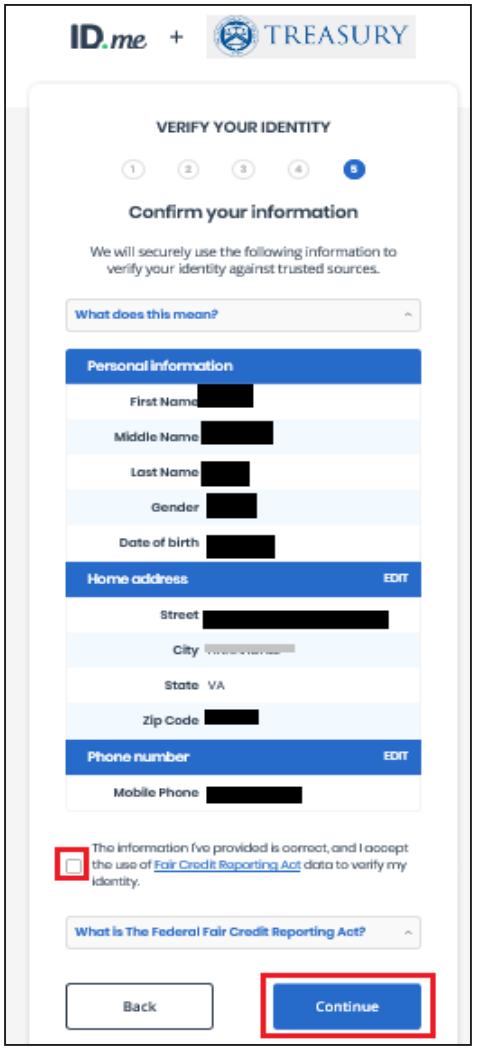
- **Step 4**
  - Enter your most recent home address and press **Continue**.
  - Enter your Social Security Number and press **Continue**.





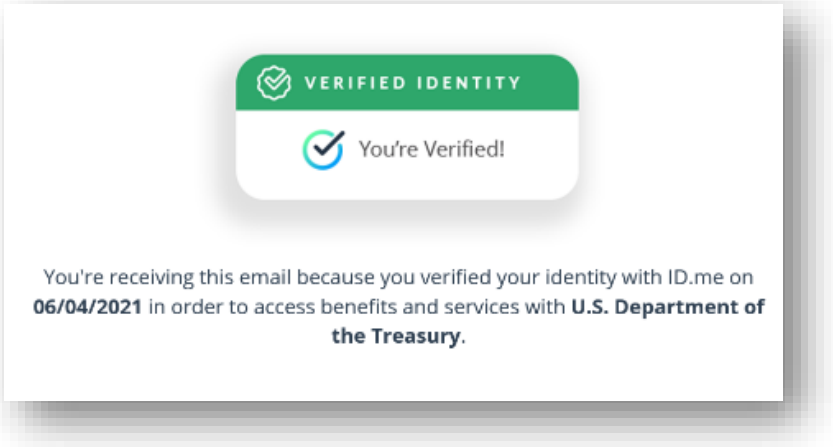
Option 1: Upload Photos of Your License or State ID

- **Step 5**
  - Verify all information
  - Check box – **Accept the use of Fair Credit Reporting Act**
  - Select **Continue**



Option 1: Upload Photos of Your License or State ID

- **Step 5 (continued)**
  - You will see a message that the system is in the process of verifying your identity. This may take up to 10 seconds.
  - When your identify is verified, ID.me will send you a congratulations email.



- If ID.me **completed** your identify verification, **go to Slide 29**.

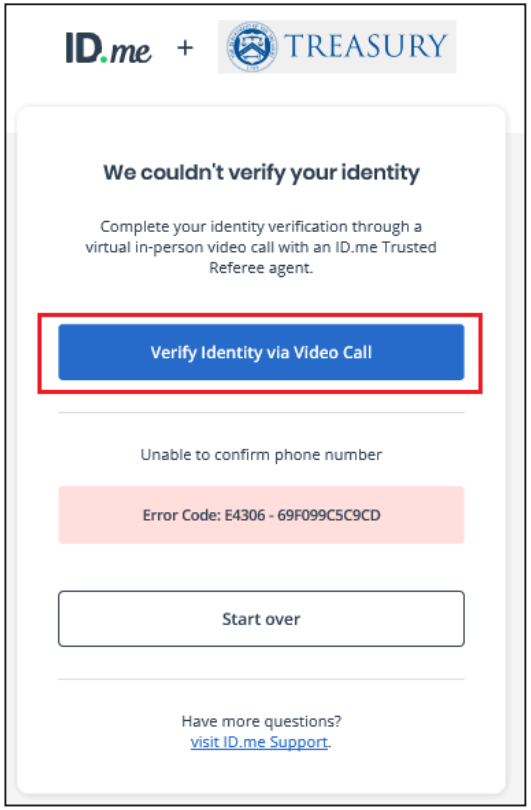
- If ID.me **could not complete** your identify verification, follow the steps below for a **virtual in-person proofing**.

Option 2: Virtual In-Person Identity Proofing

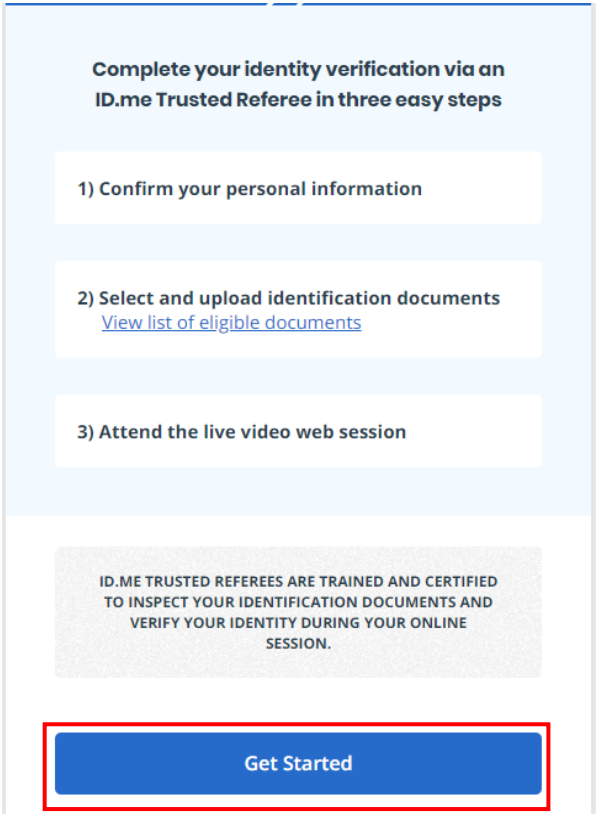
Follow these instructions if ID.me could not verify your identity or if you do not live in the U.S.

- Select **Verify Identify via Video Call** or **Get Started** (for whichever screen you see)

Unable to Verify

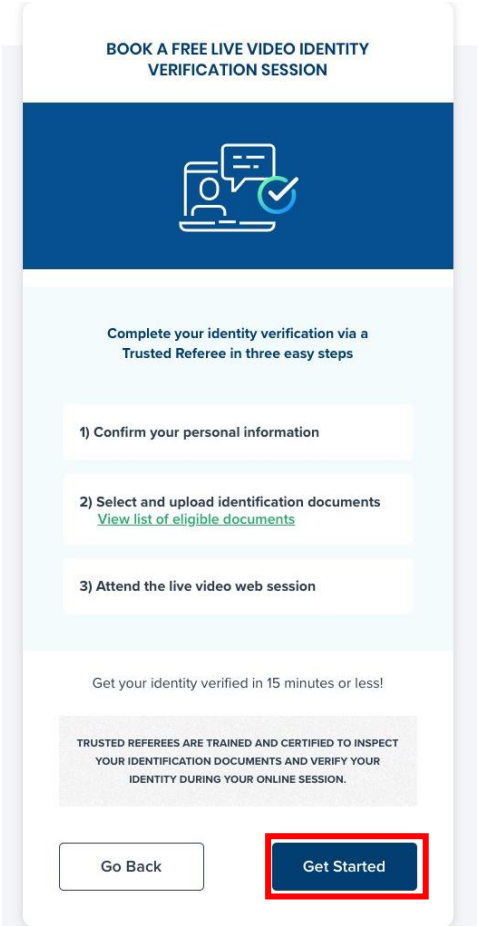


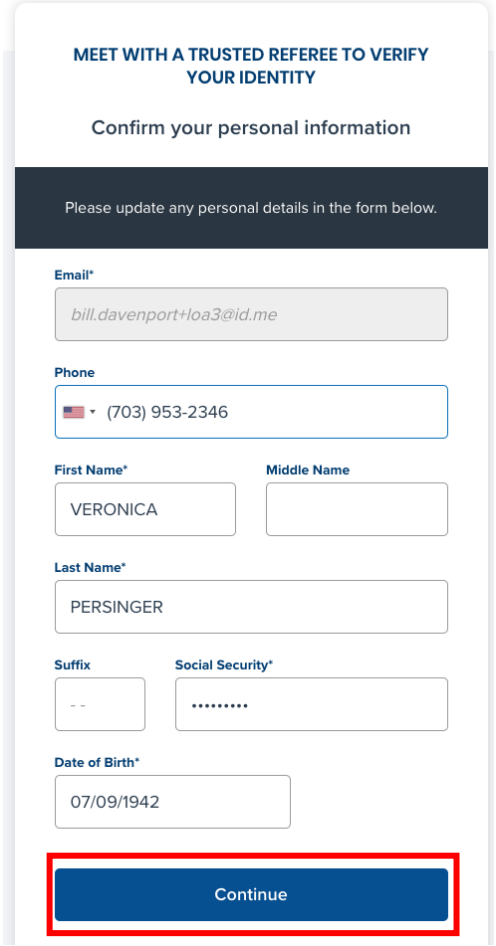
International



Option 2: Virtual In-Person Identity Proofing

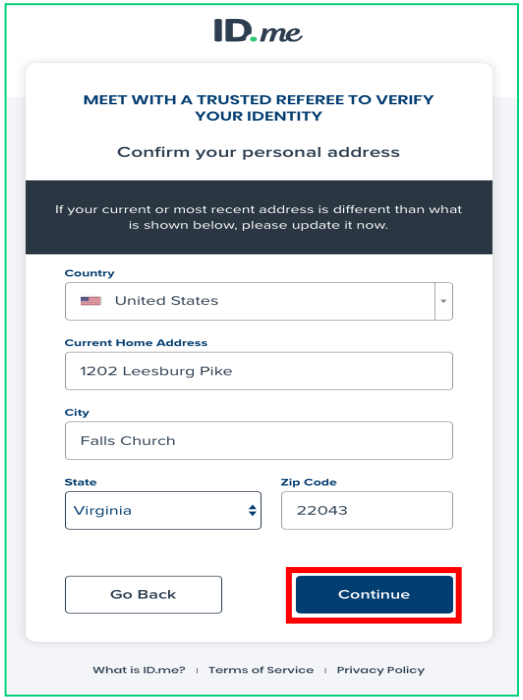
- When you are ready to begin, select **Get Started**
- Confirm that your personal information shown on the screen is accurate and select **Continue**

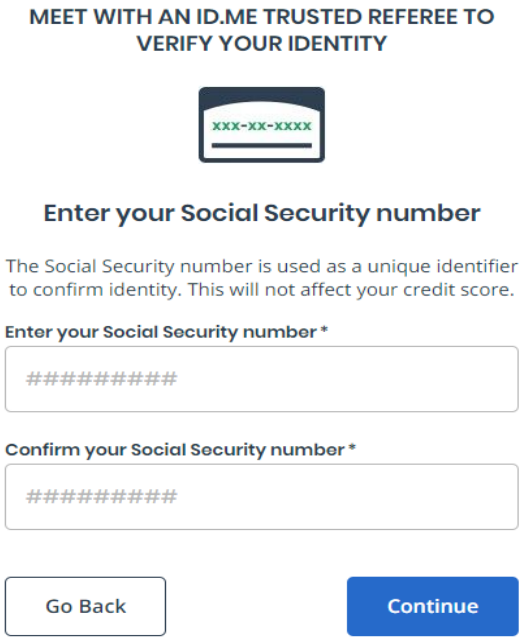




Option 2: Virtual In-Person Identity Proofing

- Confirm that the address shown on the screen is your current or most recent address and select **Continue**
- If requested, enter and confirm your Social Security number
- Click **Continue**

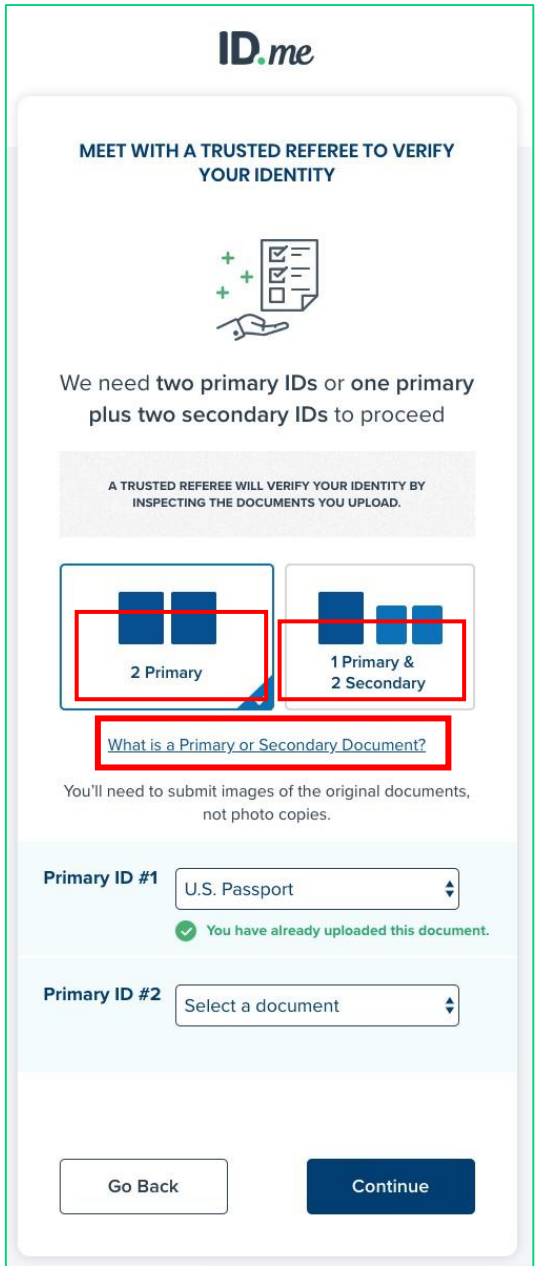




Option 2: Virtual In-Person Identity Proofing

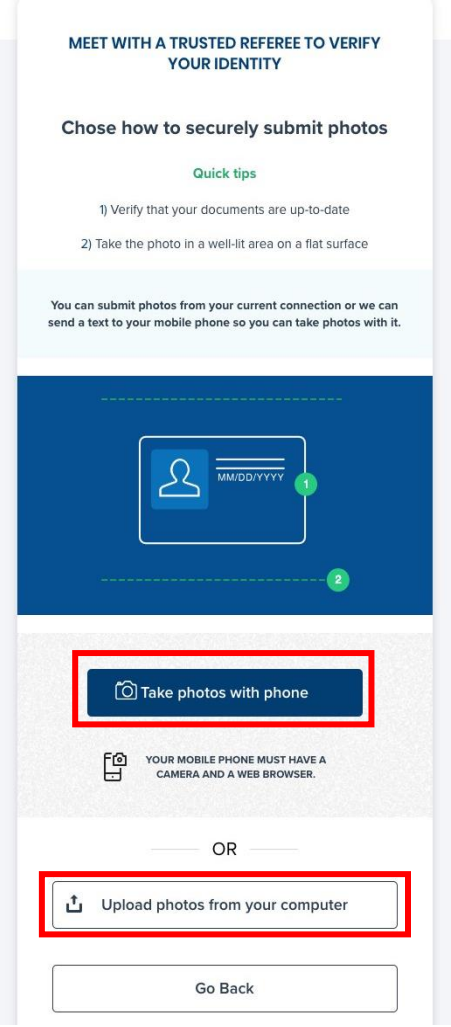
- Upload:
  - Two primary IDs

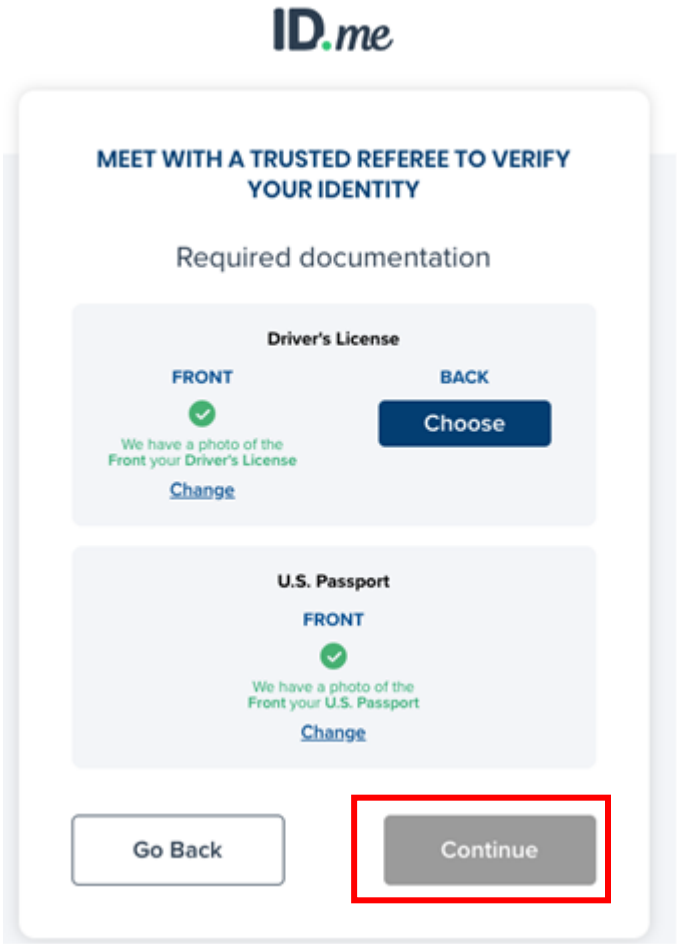
    OR
  - One primary and two secondary IDs
- For a list of Primary and Secondary ID types, select **What is a Primary or Secondary Document?**
- Use the drop-down menus to select the ID types you are using



Option 2: Virtual In-Person Identity Proofing

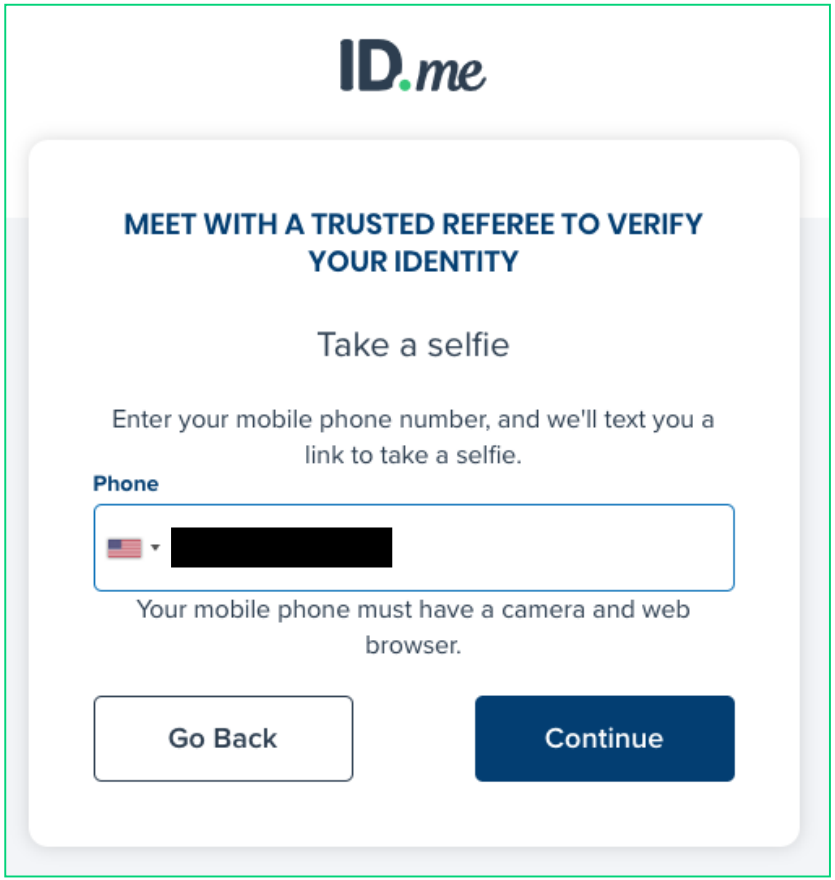
- Upload photos of your documents from your computer or by taking pictures with your mobile phone, then select **Continue**





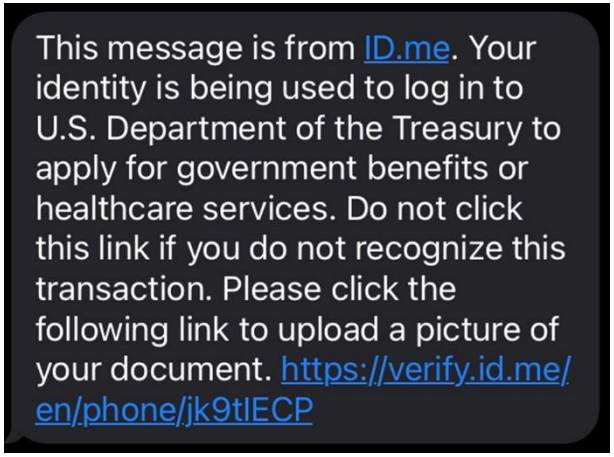
Option 2: Virtual In-Person Identity Proofing

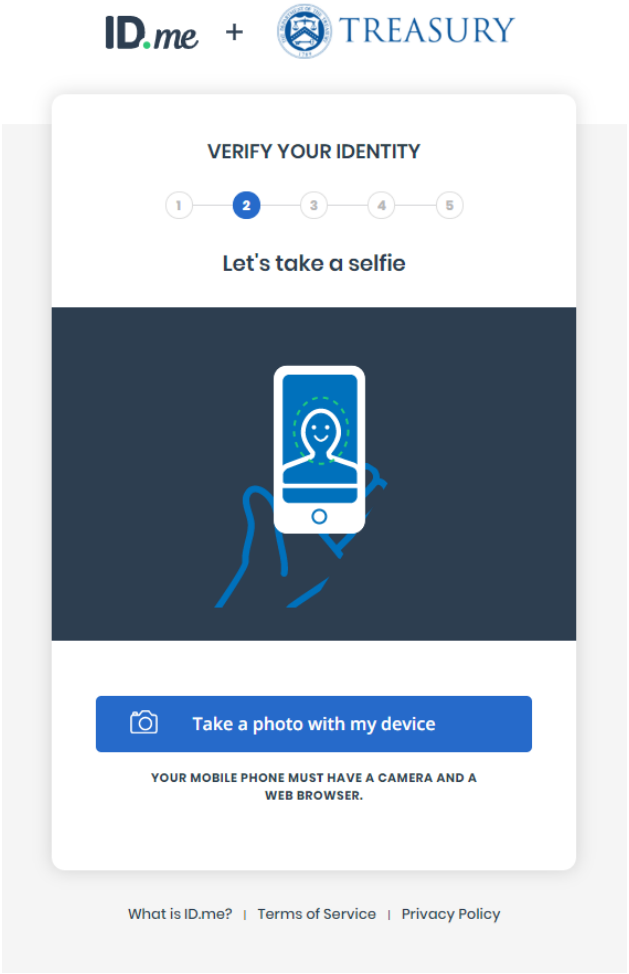
- Enter your mobile phone number and select **Continue**
- You will be texted a link to capture a photo of yourself (selfie capture)



Option 2: Virtual In-Person Identity Proofing

- Select the link that was sent via text
- **Upload a selfie or face scan** using the camera on your mobile device
  - Once uploaded, ID.me will verify your identity automatically
    - If ID.me cannot verify your information, you will need to input your data manually

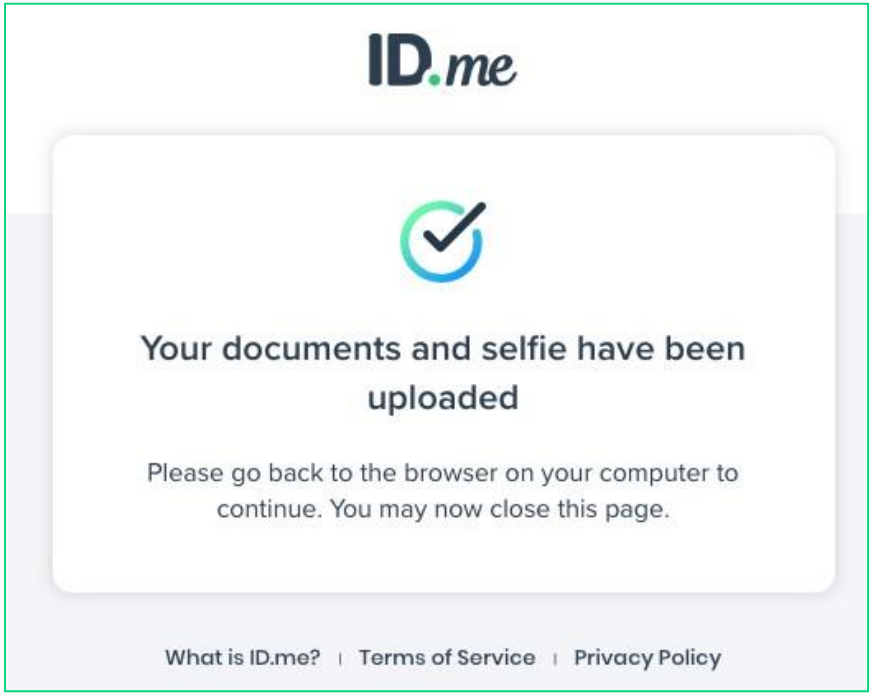


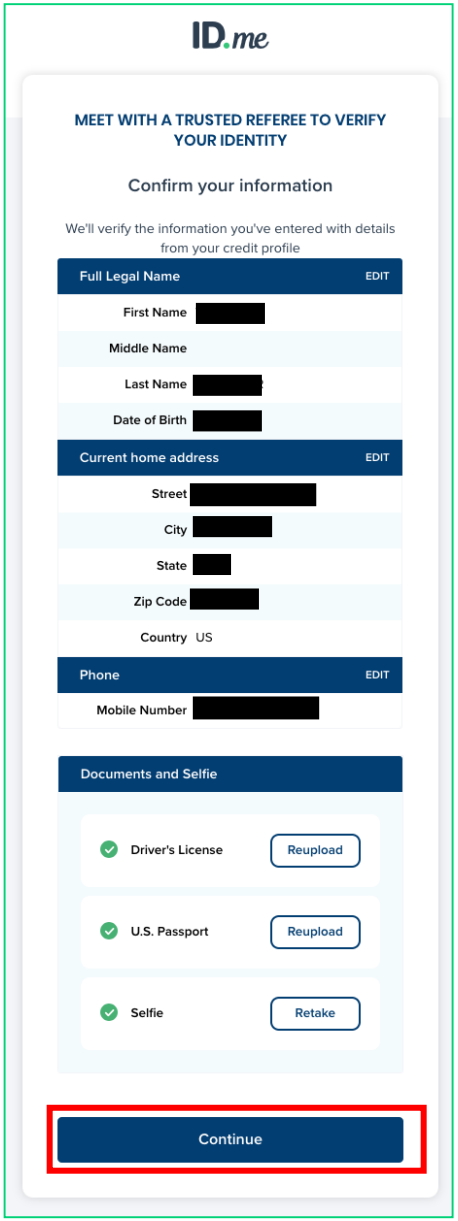


Option 2: Virtual In-Person Identity Proofing

- Next, return to the browser where you started creating your ID.me account.
- Verify your personal information, then select **Continue**

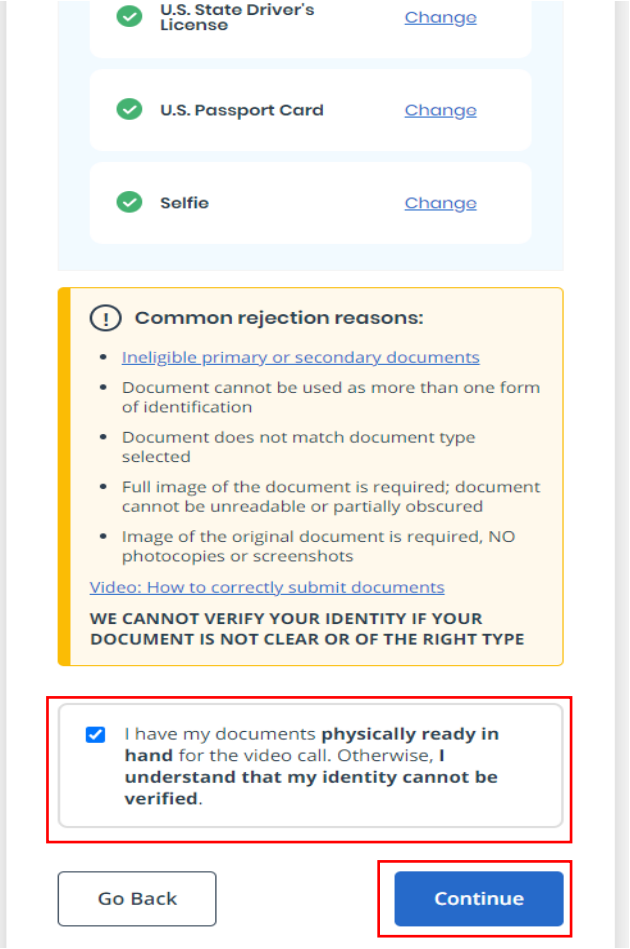
- If **not** prompted for a video call, **proceed to slide 29**





Option 2: Virtual In-Person Identity Proofing

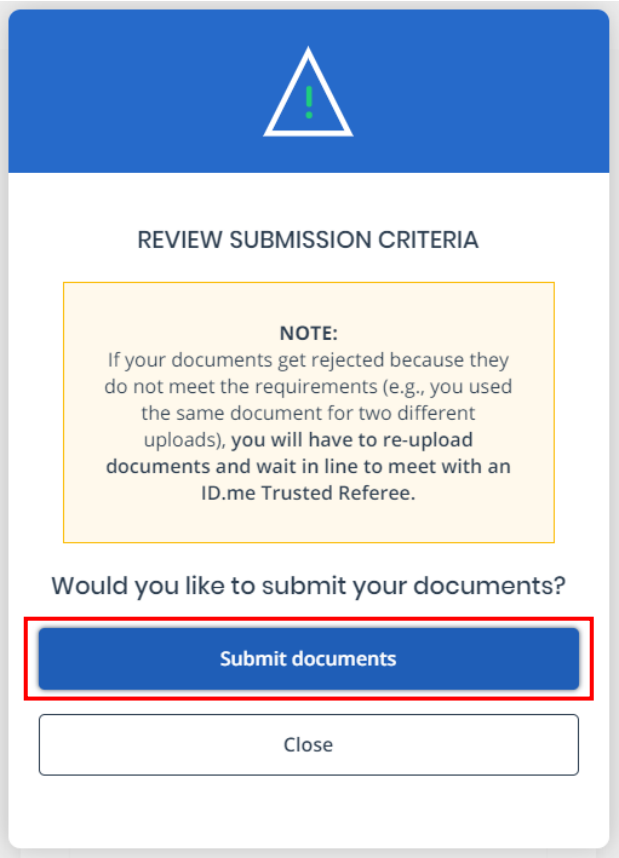
- At the bottom of the Confirm Your Information page (seen on slide 23), you will see Common rejection reasons and a checkbox indicating you have your physical documents ready for the call



- Once you have your documents, **check the box** and then select **Continue**

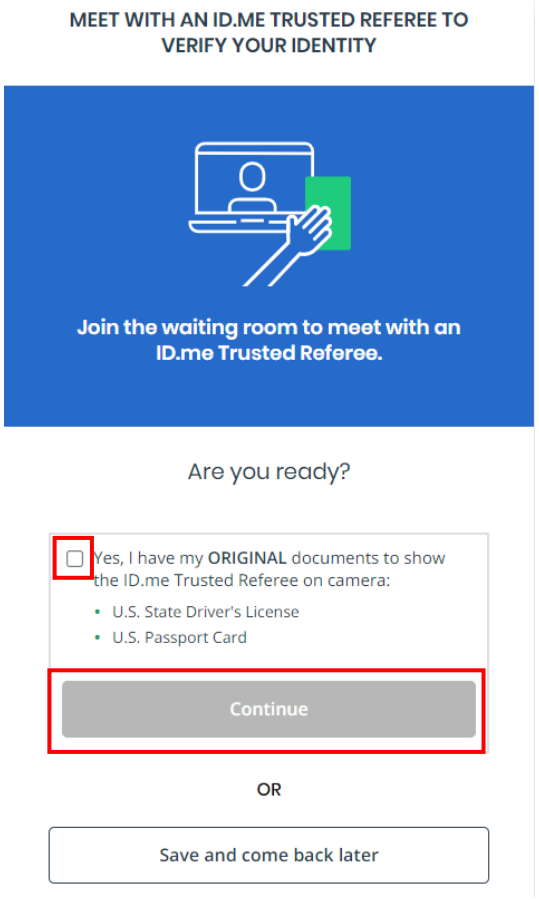
Option 2: Virtual In-Person Identity Proofing

- If **ready** for submission, click **Submit Documents**
- If you want to review your submission, change uploaded documents, or update information, click **Close**. Verify your personal information, then select **Continue**



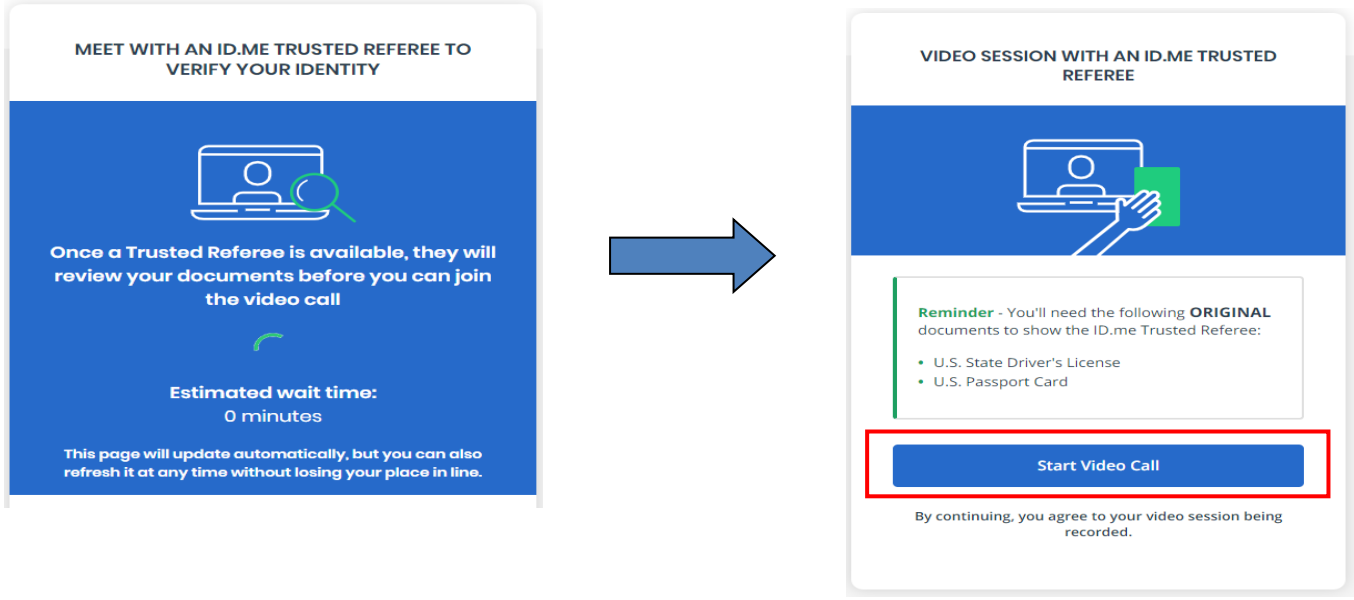
Option 2: Virtual In-Person Identity Proofing

- After submitting your documents, you will be directed to a **virtual waiting room** to meet with an **ID.me Trusted Referee**
- **Check the box** that you have your original documents to show the Referee on camera
- Click **Continue**



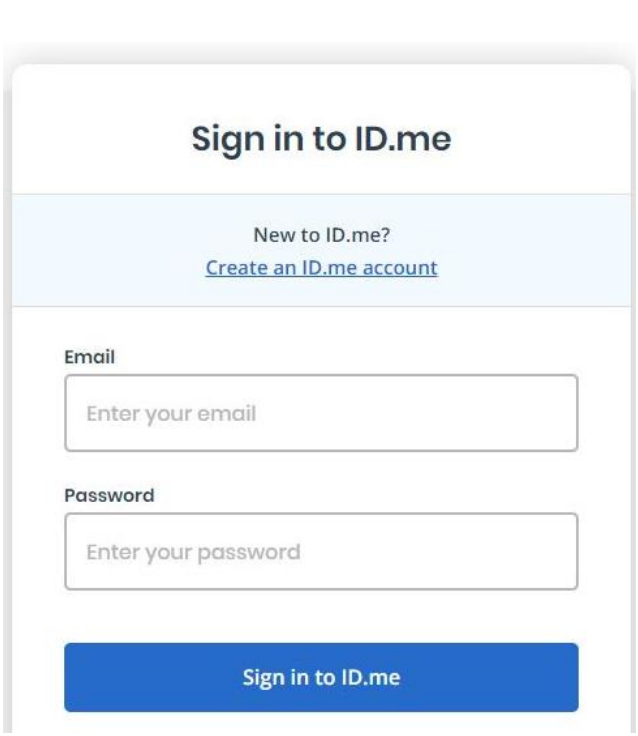
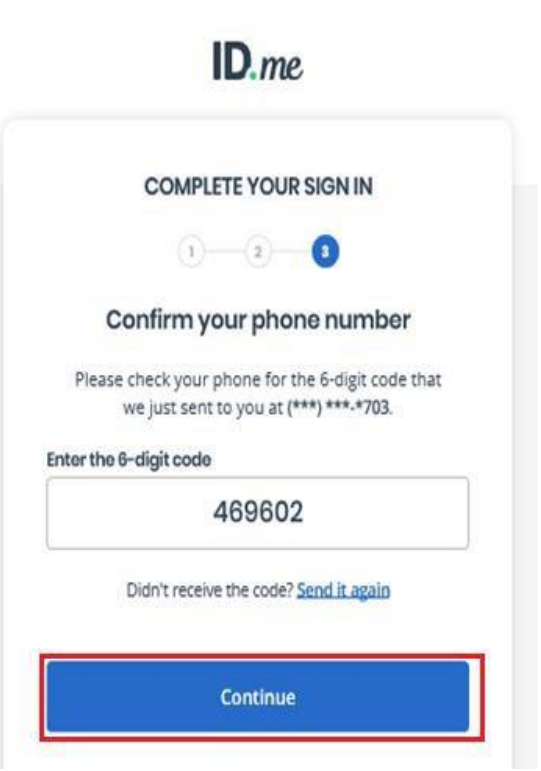
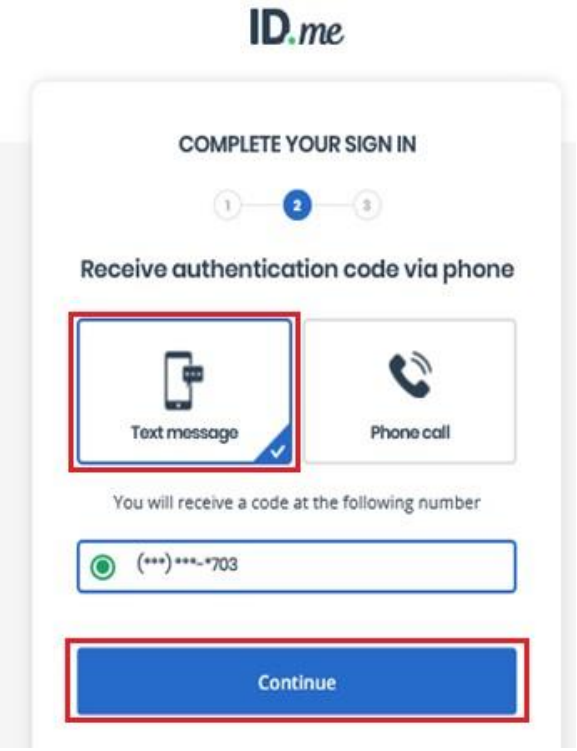
Option 2: Virtual In-Person Identity Proofing

- You will be placed in a waiting room and will see a pop-up with estimated wait time
- You will be **automatically redirected** to the meeting page to begin the video call
- Click **Start Video Call**



Option 2: Virtual In-Person Identity Proofing

- The Trusted Referee will ask you to do the follow:
  - **Verbally approve** call to be recorded for quality assurance
  - **Confirm** information (name, address, date of birth, Social Security Number)
  - **Show** your documents through the camera
  - **Allow** the Trusted Referee to take a screenshot of you for selfie matching

Log on to CERTS Portal

- Once ID.me identity verification is complete, you will receive a confirmation email and will be redirected to the CERTS Portal.
  - **Sign in** to the CERTS Portal with your ID.me email and password
- You will be prompted to complete **dual-authentication**
  - Receive authentication code via phone
  - Select Continue on the next two screens