

CTEP-IAM / ID.ME INTEGRATION

EXISTING USERS ON-BOARDING TO ID.ME

August 9, 2023 CTIS, INC 1 RESEARCH CT, ROCKVILLE, MD 20850

CTEP-IAM Release 5.8.0

<u>Use Case</u>: Existing CTEP-IAM users onboarding to ID.me and establishing a link between their CTEP-IAM and ID.me credentials

Reference:

- ID.me Government : <u>https://www.id.me/government</u>
- ID.me Privacy Policy : <u>https://www.id.me/privacy</u>
- ID.me Privacy Bill of Rights : <u>https://insights.id.me/privacy-bill-of-rights/</u>
- NCI and ID.me Help Page : <u>https://help.id.me/hc/en-us/articles/4711388572695-NCI-ID-me</u>
- ID.me Support : <u>https://help.id.me/hc/en-us</u>

Application URL:

• <u>https://ctepcore.nci.nih.gov/iam</u>

CTEP-IAM Account Login

1. Copy the application URL (above) and paste it into a browser or click on the link

Alerti Expected Timeline: Early Summer 2022 NCI will be implementing enhanced system access procedures early this summer (July 2022) that will affect averybody from NCI staff to site staff, including mvestigators. This is being done to ensure the security of NCI systems and data and to comply with Federal ensurements Sign In Reset	
that NCI cannot innere. NCI must incorrorate identity	
Proofing (IP) and Multi-Factor Authentication (MFA) into system access proceedures. What's Next: Keep an eye on the CTSU website and Bi- Monthly Broadcasts for more information about the public hairs and announcements about new resource materials.	Read More

Figure 1: CTEP-IAM Login Screen

- 2. Under "CTEP-IAM", enter current CTEP-IAM username and password.
 - If password has expired, please use the "Forgot Password" feature to change the password.



Figure 2: CTEP-IAM Welcome Screen After Login

- 3. Navigate to "ID.me Information" section
 - a. Option I: "Click here" (highlighted in the above snapshot) will take users to "ID.me information" section.
 - b. Option II: Click on "Personal Information" on the left menu to go to "ID.me information" section.

	Name	Mr. Hariprasad Nagaraj Cavanagère	Username	HDAVANAGERE	CTEP Person ID A-510672
	Institution/Address	Capital Technology Information Services Inc One Research Court Suite 200 Rockville, MD 20850 USA		Contact Information	Office Phone: (301) 545-3033 Email: NGavanaperegictsurc.com
User's ID me infor	mation linked to CTEP-IAM				
Not Available					
Liter has not set inkert	their IT me northe with ("TED. MAR cred	Services.			
Sten to estat					
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Establishing and Linking ID.me Credentials

ot Available	
er has not yet link	ed their ID me profile with CTEP-IAM credentials.
ep to esta	ablish ID.me credentials and link it with your CTEP-IAM Account
.≡	As per NCI's assurance level requirements CTEP-IAM users are required to create an account in ID me and complete Identity Proofing (IP) and Second Factor configuration (2FA) workflows. Please follow the steps below:
	Click on "IB-me Create an account" button below to initiate the process of establishing link between CTEP-IAM credentials and ID me account. ID.me. Create an account
	 When redirected to ID.me, if you have an existing ID.me account then choose "Sign into your account", if you are new to ID.me please choose "Create an ID.me account".
	ID me will take you through the steps to complete Identity Proofing and 2nd factor configuration according to NCI-CTEP's assurance level requirements.
	 After successful completion of all ID.me requirements you will be redirected to CTEP-IAM.
	Note: Some list of documents that ID.me requires for your Identity proofing are Driver2s License (primary evidence for people residing in USA) and passport for individuals residing in other countries. For additional information please contact ID.me support team. For additional information on list of documents required and assistance in establishing ID.me

Figure 4: ID.me Information Section

4. Click on "ID.me Create an account" button (highlighted in the above snapshot)

ne profile with	Transitioning to ID.me	
ID.me c	AM → ID.me	
NCI's assur		mplete Identity Pr
follow the s	You are leaving CTEP-IAM website and transitioning to ID.me website for completing Identity Verification and Multifactor configuration steps.	
Dick on "ID	Please click Continue to proceed to ID.me	TEP-IAM credenti
Vhen redire	To abort the transition, please click $"{\bf X}"$ at the top right corner of the popup window.	t", if you are new t

Figure 5: Popup Message Before Redirecting Users to ID.me

5. Click on '*ID.me create an account*" and sign in or create a new ID.me account with a secure email address. *Note: If users already have an ID.me account or initiated the process of linking ID.me account to CTEP-IAM but the process aborted before completion, click "sign in"*



Create an ID.me account
Already have an ID.me account? Sign in to your account
Email
mrob@ctisinc.com
Password
Confirm Password
I accept the ID.me Terms of Service and Privacy Policy

Figure 6: ID. me Create Account Screen

1. Select and set up Multi Factor Authentication (MFA) option. Available options are shown in the below snapshot

7	Text Message or Phone Call Get a 6-digit code by text message or phone call.
2	Push Notification Approve sign-ins via push notifications sent to the ID.me Authenticator mobile app.
	Code Generator Application Generate verification codes via code generator apps like ID.me Authenticator.
	Security Key Use a physical security key (insert or tap) with your device.
L.	NFC-Enabled Mobile Security Key Tap a YubiKey™ security key to your phone using the ID.me Authenticator mobile app.

Figure 7: Available MFA factor options

2. Choose an identification method and submit for verification. The verification methods are shown in the snapshot

	VERIFY YOUR IDENTITY
We'll	need permission to use details from public sources to verify your identity.
Cł	noose a verification method
	Verify using your phone number Enter your personal phone number. Then, we'll confirm your identity.
Ø	Upload photos of your license or state ID Upload photos of your driver's license or state ID.
	Upload a photo of your passport Upload a photo of your passport.
ŧ,	<u>Upload photos of your passport card</u> Upload photos of your passport card.

Figure 8: Verification Methods

Below are the verifications methods and documents needed based on resident location:

- For US nationals
 - The easiest and simplest method of verification will be by using a phone registered in your name.
 - Driver's License or State ID
 - A copy of Passport
 - A copy of Passport Card

- For Canadian nationals
 - A copy of driver's License will be accepted for verification
 - A copy of Passport
 - A copy of Passport Card
- For other nationals
 - A copy of Passport
 - A copy of Passport Card
- 3. On successful completion of the identity verification and multi factor authentication configurations, ID.me will present the screen shown below and request users' consent to share five attributes to CTEP-IAM.
- 4. Please click "Allow" to complete the activation of CTEP-IAM account along with establishing a link to users' ID.me credentials.



Figure 9: Allow Sharing Option

- 6. Few points to note:
 - a. It is important that users accept to share data with NCI CTEP and click "Allow", without which the new account activation will not be complete.
 - b. If the users choose to "Deny", they will be redirected back to CTEP-IAM without completing the account activation. In this case, users will have to repeat the ID.me

establishing steps, however, during the subsequent attempts, users will choose the ID.me option to "Sign in to your account" instead of creating a new ID.me account.

7. On successfully establishing the link, users must view their ID.me credentials in CTEP-IAM as shown below

CTEP-IAM Credentials Linked to ID.me
AM ID.me
Your CTEP-IAM credentials are now linked with ID.me and you are successfully back to IAM website
Please click Continue
Acuve: Ins statu

Figure 10: Popup Message on Returning to CTEP-IAM

						<i></i>	
	Name Shneha Ac	charya		Username:	ACHARYAS90	C	TEP Person ID A-653873
Institution/A	ddress Capital Teo 117 Quince Gaithersbu USA	chnology Information Services Inc e Meadow Avenue urg, MD 20878			Contact Information	Office Phone: Email:	(571) 424-9190 sacharya@ctisinc.com
User's ID.me information linked t	CTEP-IAM	_	_	Description		_	
Email Address s*****@ctisinc.com			Primary email associated to the user's ID me account. This can be different than the user's primary contact email associated with CTEP profile. Please contact ID me for any assistance needed with your ID me email and password.				
Name	SHNEHA ACHARYA Use		User's name associated with the ID me account. Format < First Name Last Name >				
Created Date		03/14/2022		Date on which the user's ID.me profile was linked to CTEP - IAM profile			
User's ID.me information linked to CTEP-IAM status		Active		Current status of user's linked profile. The profile can be in 'Active', 'Inemporanty' Disabled' and 'Resistate'. Active: This status is assigned view the I/o.me and CTEP-IAM credentials are linked for the first time. Indicates th user is allowed to use I/O.me credentials to access CTEP-IAM and federated systems. Indicates th user is accessed view of NACTIVATON workflow. Indicates the user is not allowed to use I/O.me credentials to access CTEP-IAM and federated systems. Temporarily Disabled: This status is assigned view orkflow. Indicates the user is not allowed to use I/O.me credentials to access CTEP-IAM and federated systems. Temporarily Disabled: This status is assigned view orkflow. Indicates the user is not allowed to use I/O.me credentials to access CTEP-IAM and federated systems. Temporarily Disabled: This status is assigned view orkflow. Indicates the user is not allowed to use I/O.me credentials to access CTEP-IAM and federated systems. Temporarily Disabled: This status is assigned view orkflow. Indicates the user is not allowed to use I/O.me credentials to access CTEP-IAM and federated systems. Temporarily Disabled: This status is assigned to access CTEP-IAM and federated systems. Temporarily Disabled: This status will not be allowed to reachivate. Resister: This attatus is assigned to account: impacted by a security incident. Indicates the user is allowed to reachivate CTEP credentials and use I/O me credentials to access CTEP-IAM and federated systems. The link reco not assigned this attaus bill the stein is character to resume business as usual. Note: An account will be moved to this atus as part of the SDP defined to head to resume business as usual. Note: An account will be moved to this atus as part of the SDP defined to head as access as usual. Note: An account will be moved to this atus as part of the SDP defined to head as examples incidents.			
Status Changed Date		03/14/2022		Date on which the user's ID.me profile attained one of the statuses permissible for "Profile Status"			
Comments			Comments captured on the ID me		on the ID me profile as part of CTEP-IAM applicati	on workflows.	

Figure 11: ID.me Information Section After Accounts is Linked



Validating Access to CTEP-IAM Using ID.me

Try gaining access to <u>CTEP-IAM</u> with CTEP-IAM username/password.
 a. A validation message must be displayed as shown below

	iked your CTEP-TAM account with 1D.me. Please login using your 1D.me credentials method to authenticate.
hdavanage	re
Password	
	Sign In Reset
Forgot Password	1? Reset Password? Annual Registration Request New Account Help Center
Forgot Password	27 Reset Password? Annual Registration Request New Account Help Center
Forgot Password Warning Notic For public facing	P Reset Password? Annual Registration Request New Account Help Center e: web pages to which the public has privileged access, e.g., clinical trial or adverse effects systems where users/patients are logging in to enter PII/PHI: Read More

Figure 12: CTEP- IAM, CTEP-IAM log in tab

- 9. Try gaining access to <u>CTEP-IAM</u> with ID.me account.
 - a. Users will be allowed access and should see a welcome screen as shown below

g in to enter PE(PHI: Read Hore)
ng ir

Figure 13: CTEP- IAM, ID.me Log in Tab

	Welcome to IAM
SAM ST ID.me	Your CTEP-IAM credentials are now linked to ID.me.
	CTEP-IAM Services
Your current Registration Type	is Associate.
Click <u>here</u> to access the RCR S Plus. NCI Registration Types a	system to submit your annual NCI registration and/or update your Registration Type to Investigator, Non Physician Investigator, or Associat re defined as listed below.
Registration Types	
 Investigator (IVR): MD, I Non-Physician Investigation)O, or international equivalent. tor (NPIVR): Advanced practice provider (e.g., NP or PA) or graduate level researcher (e.g., PhD).
 Associate Plus (AP): Cli Associate (A): Other clin 	nical site staff (e.g., RN or CRA) with data entry access to CTSU applications (e.g., RUMS, OPEN, RAVE, DTL). ical site staff involved in the conduct of NCI-supported research.
	dividuals (a.g., pharmaceutical company employees) with limited access to NCL supported systems (a.g., NA//ICATOP)

Figure 14: CTEP- IAM Welcome Screen

Accessing Other Applications

COMPANY

10. Please navigate to the applications that you regularly access using CTEP-IAM username/password. The same applications should now be accessible using your ID.me credentials.