Mass HIway Onboarding – Verify your Identity

Membership to the Direct network requires identity verification as per [NIST LoA3 requirements](#) to ensure that only authorized organizations are able to use the network. To meet this requirement, HCO Representatives must provide an identity declaration.

The Declaration of Identity authorizes Orion Health/Mass HIway to issue Direct digital certificates on behalf of your organization. Direct certificates facilitate the secure transmission of healthcare information between entities.

ABBREVIATIONS

- **NIST** – National Institute of Standards and Technology
- **LoA3** – Level of Assurance 3
- **DoI** – Declaration of Identity

The primary means to verify your identity is online. If you are unable to complete the verification online, then you may complete a paper form and sign it in front of a public notary.

- **Primary – Verify your identity online**
  You are given two minutes to answer 5 multiple choice questions about your finances. If you do not submit your answers within two minutes, DigiCert will not accept the submission and it counts as an unsuccessful attempt. After two failed attempts, the Online Verification option will no longer be available, and you will have to use *Secondary - signing in the presence of a notary*.

- **Secondary (If online is not an option) – signing in presence of notary**
  The DoI is signed by the HCO Representative in the presence of a notary. A scanned copy of the notarized DoI is then emailed to the Mass HIway, along with the HCO Account Request form.

Primary - Verify your identity online

1. To identify yourself and give Orion Health/Mass HIway permission to manage the certificate on your behalf, click the link in the email you received from DigiCert. This takes you to the DigiCert Portal.

   > The link is valid for 14 days.

2. Enter your personal and government ID information.

   > Use the tool, on the **Personal Verification** page, to determine what forms of ID you require. Choose your ID type, the state that issued the ID (if applicable), and the tool will tell you whether a second ID is required. It will also tell you what forms of ID are permitted as secondary IDs.

   > **Important Note:** *Your personally identifiable information, (e.g. social security number, personal contact information, financial information, etc.), is **NOT** collected, stored, or transmitted by Orion Health and/or the Mass HIway. This information is only shared between you and DigiCert in their secure infrastructure for the purpose of verifying your identity*.

3. Under **Verification Method**, select *Online Verification*. Please note that the Online Verification method is only presented as an option if you have been named on a certificate request.

On the screen that follows, you are given **two minutes** to answer 5 multiple choice questions about your finances. You will need to know information about your checking account, vehicle registration and loans. Questions about your loans may include the amount of monthly payments, names of lenders, terms and when the loan originated.

We recommend that you have your recent loan statements readily accessible so that you can refer to them, if necessary.

4. Enter your Social Security Number* and select the **I have read and agree to the terms above** checkbox.
    See previous "Important Note" regarding the use of your information

5. Answer the questions presented.

    > If you do not submit your answers <u>within two minutes</u>, DigiCert will not accept the submission and it counts as an unsuccessful attempt. After two failed attempts, the Online Verification option will no longer be available, and you will have to use *Method 1 -* Email Declaration of Identity to your HIE, which involves signing in presence of a notary.

6. Click the **DONE** button to submit your answers. If DigiCert requires more information, they will contact you.

YOU MAY FIND THIS USEFUL

- [NIST Special Publication 800-63-2: Electronic Authentication Guideline](#)

Secondary (if online is not an option) – signing in the presence of a notary

Step 1. Complete Form

Your Account Manager or the Communicate Operations team will send you a DoI form to complete.

Step 2. Notarize DoI

> You cannot use a Trusted Agent to notarize your DoI.

Take the completed DoI and your identification documents to a notary for attestation. The notary must:

- see you sign and date page 2 and page 4 of the DoI.
- fill out the ACKNOWLEDGMENT section and sign.

Step 3. Create Digital Copy of DoI

Scan the notarized form. The scanned DoI must be clearly legible, and can either be a PDF or an image file.

Step 4. Submit Documents

Email the completed forms to Orion Health/Mass HIway, namely:

- HCO Account Request form (if not already submitted)
- DoI form