Sign-Up Portal

Quick Start Guide - Version 1.0

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Environment

FIGmd is committed to the conservation of natural resources and reducing its overall burden on the environment. Please consider the environment before printing this document.
New User - Registration
Register to get access to the Sign-Up Portal

Registered User - Login
Option for registered users to log into the portal

Post-Registration
Email link to access the Pegasus dashboard

Forgot Password
Link to reset forgotten password

Sign-Up Portal

Organization
Milestone 1
Provide organization, contact and TIN details

Technical Survey
Milestone 2
Specify data submission method: Electronic (Pull / Push) or Manual

Clinicians/Locations
Milestone 3
Provide clinician and location details

Agreement
Milestone 4
Sign the Registry Participation agreement & FIGmd agreement

Payment
Milestone 5
Provide details about the mode of payment
## Introduction

Pegasus 2.0 has new features which include a new registration & sign-up portal for onboarding, my Account for administrative tasks, smart service desk integration for seamless integration of Service Desk, RPC/SPINE/File Distributor enhancements to increase efficiency of EMR extraction, and Janus enhancements for optimized operations.

The new Sign-Up portal has a single database for Pegasus, JANUS, registration portal, sign-up portal, and RPC Management HUB unlike the previous version. This offers several advantages such as no manual syncing of data, single point of access for all data, faster & lucid sign-up process, better coordination for Elixir participants, and ability to centrally participate and manage multiple programs.

It offers multi-tenant registration for sign-up and various other features such as capturing new details, and personalizing and customizing the administrative space. There are multiple payment plans for practices, groups, ACOs, etc. Users can customize agreements for practices, groups and ACOs.

The sign-up process is divided into five major milestones namely, capturing organizational & contact details, feeding clinician information and their location, signing agreements, selecting the preferred mode of data exchange (either FIGmd's enterprise connectors or manual upload), and selecting subscription plans.

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**Contact Us**

E-mail: <Registry Name>cams@figmd.com
<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🎨</td>
<td>Toggle to view or hide the password in the password field.</td>
</tr>
<tr>
<td>🏅</td>
<td>Represents mandatory field(s).</td>
</tr>
<tr>
<td>🎬</td>
<td>Represents the completed milestone.</td>
</tr>
<tr>
<td>🔄</td>
<td>Expand to view the information in the milestone.</td>
</tr>
<tr>
<td>✍️</td>
<td>Enables to edit the details of a record.</td>
</tr>
<tr>
<td>🗑️</td>
<td>Enables to delete the record.</td>
</tr>
<tr>
<td>🔍</td>
<td>Enables to search for a record.</td>
</tr>
<tr>
<td>🕵️‍♂️</td>
<td>Represents the in progress milestone.</td>
</tr>
<tr>
<td>👆</td>
<td>Collapse to close the information in the milestone.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📄</td>
<td>Enables to download the document.</td>
</tr>
</tbody>
</table>
New User Registration

New users have to register themselves to access the Sign-Up portal using the link provided by the Registry.

<table>
<thead>
<tr>
<th>Step 1: Access Registration Link</th>
<th>Step 2: Registration Details</th>
<th>Optional Step</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Login</strong></td>
<td><strong>Register</strong></td>
<td><strong>Email has been sent to your registered email address. The email has all the required details for you to complete the signup process.</strong></td>
</tr>
<tr>
<td>User Name *</td>
<td>Admin Contact Details</td>
<td><strong>RESEND EMAIL</strong></td>
</tr>
<tr>
<td>Password *</td>
<td>First Name *</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Last Name *</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Demo</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Email Address *</td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="mailto:demoadmin@gmail.com">demoadmin@gmail.com</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Confirm Email Address *</td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="mailto:demoadmin@gmail.com">demoadmin@gmail.com</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contact No *</td>
<td></td>
</tr>
<tr>
<td></td>
<td>+1 1111111111</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Login Name *</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Demo User</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Organization Details</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Name *</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Demo Organization</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enter Captcha *</td>
<td></td>
</tr>
<tr>
<td></td>
<td>D3fz5</td>
<td></td>
</tr>
</tbody>
</table>

1. Register yourself using the **REGISTER HERE** link.
2. Provide details about your admin and organization in the registration window.
3. Enter displayed Captcha code.
4. Click **SUBMIT**.

Captcha is provided for an additional level of security and is case-sensitive. Regenerate Captcha if expired or not legible.

Email is sent to your registered email address. If you have not received the email, please click **RESEND EMAIL**.
**Step 3: Login Credentials Email**

- TEST Registry Sign Up Account: Login Credentials
- demo.pegasus@bet.figmd.com
- To me:
- We have created your login for the TEST sign up portal. Please set your password by clicking here.
- Your username is Demo User.
- For further assistance, please contact your Client Account Manager (CAM).
- Regards,
- TEST Support Team.

---

**Step 4: Set Password**

- **Set Password**
  - Set *Password*
  - **Password**
  - Confirm Password
  - **SUBMIT**

- Note:
  - Green checkmark indicates that the password criteria has been met.
  - Red X indicates that the password criteria has not been met.

---

**Step 5: Access Login Page**

- **Password Created Successfully**
  - LOGIN

---

5. **Click on the link provided in the email to set your password.**

6. **Set your password as per the password criteria.**

7. **Click SUBMIT.**

8. **Click LOGIN to access the login page.**
Registered User Login

Registered users can log into the Sign-Up portal using the link provided by the Registry.

1. Enter your credentials on the Login page.
2. Click LOGIN.
   Successful login navigates to the Sign-Up Portal.

Optional: Click FORGOT PASSWORD link to reset a forgotten password.

Note:
- Use the same credentials used while registering with the portal.
- Toggle the eye icon in the password field to view or hide the password.
Sign-Up portal has five milestones to capture information required and relevant to the sign-up process.

1. Organization
2. Technical Survey
3. Clinicians/Locations (Locations - configurable as per Registry)
4. Agreements
5. Payment

Note:
Each of the milestones and the order of display is configurable as per Registry requirement.
## Milestone 1: Organization

<table>
<thead>
<tr>
<th>Organization</th>
<th>Technical Survey</th>
<th>Clinicians/Locations</th>
<th>Agreement</th>
<th>Payment</th>
</tr>
</thead>
</table>

**1. Organization**

**Organization** is the first milestone. This milestone captures the demographic information about your organization, details about your admin, IT, and the signatory contacts, and details of the TIN's under which your organization is billing.

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*Tax Identification Number* is an identifying nine-digit number used for tax purposes in the United States.
### Organization Details

**ORGANIZATION DETAILS**
- Name: Demo Organization
- Type: Medical Group
- ID: 1206
- Number & Street: 111111
- Building/Suite/Floor: Demo Address
- Zip Code: 60007
- City: Elk Grove Village
- State: Illinois

1. Enter demographic details of your organization.
2. Click **SAVE**.

**Note:**
- Practice ID is auto-generated by the system, auto-populated and non-editable.
- On entering Zip code, City and State are auto-populated.

### Contact Details

**CONTACT DETAILS**

Add /Edit or Delete the contact details.

3. Click **ADD CONTACT**.
   - Optional: Click the **Edit** or **Delete** icons to update existing contacts.

**Note:**
- Contact details can be added for:
  - Practice Admin
  - IT Admin
  - Signatory contact
- To search for an existing contact, type the name, role, email or phone number in the search field.

### TIN Details

**TIN DETAILS**

Add, Edit or Delete the TIN details.

4. Click **ADD TIN**.
   - Optional: Click the **Edit** or **Delete** icons to update existing TINs.

**Note:**
- Multiple TINs can be added.
- To search for an existing TIN, type the TIN number or TIN validity dates in the search field.
## Milestone 2: Technical Survey

<table>
<thead>
<tr>
<th>Organization</th>
<th>Technical Survey</th>
<th>Clinicians/Locations</th>
<th>Agreement</th>
<th>Payment</th>
</tr>
</thead>
</table>

---
2. Technical Survey

Technical Survey is the second milestone. This milestone captures information about the data submission method selected by your organization.

The three sections of the Technical Survey include:

- Method to submit organization data
- Authorize program participation
- Know about the organization
1. Method to submit organization data

**Electronic Data Pull Push**

<table>
<thead>
<tr>
<th>Electronic Data Pull</th>
<th>Electronic Data Push</th>
<th>Manual Data Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FIGmd Enterprise Connector is installed and interfaces with the practice EHR/PM system</strong></td>
<td><strong>FIGmd Enterprise Connector is installed and interfaces with the practice EHR/PM system</strong></td>
<td>Manually enter data using a webtool.</td>
</tr>
</tbody>
</table>

- Provide the details of your EHR system
- Provide the details of your PM system.
- Click **SAVE**.

**Note:** If your EHR is cloud-based, please contact <Registry Name>cams@figmd.com to ensure we are able to work with your EHR before completing the sign-up.

- Select the file format from the drop-down.
- Click **SAVE**.

**Note:**
- **Supported file formats:** QRDA, CCDA, Custom XML, CSV, text, dat, json etc.
- **Unsupported file formats:** Excel based files like XLS or XLXS, Rich Text Format (RFT) and Crystal reports etc.

- Choose the Manual Data Entry option.
- Click **SAVE**.
## 2. Authorize program participation

### AUTHORIZE PROGRAM PARTICIPATION

If your organization is a multi-specialty clinic, you may participate in multiple registries/programs in the future. A privileged user (admin) from your organization will be able to enrol your organization into multiple programs through the platform's user interface. Do you wish to centrally authorize every new registry/program participation request before the user can complete the enrollment process? Until the designated authority has not approved the new registry/program enrollment request, the enrollment process will not be complete.

- Yes, I want to authorize every new registry/program enrollment request.

### 3. Tell us more about your organization

#### TELL US MORE TO KNOW YOUR ORGANIZATION BETTER

- Does the organization administer patient reported outcome measure?
  - Yes
  - No

- If so, what is the mode of administration?
  - Via online portal/website using smartphone or personal computer
  - In office kiosk/laptop/iPad/eBook

---

Centrally authorize every new registry/program participation before completion of user enrollment.

- Select the checkbox to authorize program participation.

Specify your organization details.

- Select the appropriate option.
- Click **SAVE**.
## Milestone 3: Clinicians/Locations

<table>
<thead>
<tr>
<th>Organization</th>
<th>Technical Survey</th>
<th>Clinicians/Locations</th>
<th>Agreement</th>
<th>Payment</th>
</tr>
</thead>
</table>

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Clinicians/Locations is the third milestone. Captures the information about the clinicians/locations associated with your organization.

Two sections:
- Clinician Details
- Location Details (configurable as per Registry)
Clinicians Details

Clinician Details section captures details of the clinicians associated with the organization. It enables to add new clinicians and edit or delete existing clinician details.

New clinicians can be added individually or can be imported in bulk:

- **Individual** (+ Add Clinician)
- **Bulk** (Import Clinicians)

---

**CLINICIAN DETAILS**

- Click on the 'ADD CLINICIAN' to add/create a new clinician.
- To enroll/add multiple Clinicians to the Registry, please click on 'DOWNLOAD TEMPLATE'. Once the template has been completed, click on 'IMPORT CLINICIANS' to upload the completed template file.

Search by Name, NPI, Email

No Data Found
**Add Individual Clinician**

<table>
<thead>
<tr>
<th>ADD CLINICIAN DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Details</td>
</tr>
<tr>
<td>Clinician NPI</td>
</tr>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Contact Details</td>
</tr>
<tr>
<td>Email Address</td>
</tr>
<tr>
<td>Phone No</td>
</tr>
<tr>
<td>Professional Details</td>
</tr>
<tr>
<td>Select Specialty</td>
</tr>
<tr>
<td>Pharmacist</td>
</tr>
<tr>
<td>Select Clinician type</td>
</tr>
<tr>
<td>Physician</td>
</tr>
</tbody>
</table>

**Add Clinicians in Bulk**

<table>
<thead>
<tr>
<th>Add Clinicians in Bulk</th>
</tr>
</thead>
</table>

**Add Clinician Details page captures the personal, contact and professional details of the clinician.**

1. Click + ADD CLINICIAN on the landing page of the milestone.
2. Provide the clinicians details on the ADD CLINICIAN DETAILS page.
3. Click SAVE.

Newly added clinician is displayed in the grid.

**Note:**
- On entering the Clinician NPI, the fields firstname, last name, phone number, and specialty are auto-populated.
- First name and last name fields are not-editable.
- Clinician Type:
  - Physician
  - Nonphysician
- Multiple specialties can be added.

**Add Clinicians in Bulk**

1. Click DOWNLOAD TEMPLATE.
2. Enter the clinicians details in the downloaded template file and save.
3. Click IMPORT CLINICIANS to upload the saved file.

---

3 Template file is in XLS format with predefined columns
Imported clinicians are displayed in the grid.

**CLINICIAN DETAILS**

- Click on the 'ADD CLINICIAN' to add/create a new clinician.
- To enroll/add multiple Clinicians to the Registry, please click on 'DOWNLOAD TEMPLATE'. Once the template has been completed, click on 'IMPORT CLINICIANS' to upload the completed template file.

<table>
<thead>
<tr>
<th>Name</th>
<th>NPI</th>
<th>Member ID</th>
<th>Email</th>
<th>Phone</th>
<th>Member Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEMO CLINICIAN</td>
<td>1790062958</td>
<td></td>
<td><a href="mailto:democlinician@gmail.com">democlinician@gmail.com</a></td>
<td>+1 1111111111</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
**Location Details** section captures details of the locations associated with the organization. It enables users to add new locations, and edit or delete existing location details.

1. Click **+ ADD LOCATION**.
2. Provide the necessary details in the **Add Location Details** window.
3. Click **SAVE**.

Newly added location is displayed in the grid.

(Optional) Search for a location by typing the location details in the search field.
### Milestone 4: Agreement

<table>
<thead>
<tr>
<th>Organization</th>
<th>Technical Survey</th>
<th>Clinicians/Locations</th>
<th>Agreement</th>
<th>Payment</th>
</tr>
</thead>
</table>


4. Agreement

**Agreement** is the fourth milestone. It involves signing of the agreement by the authorized signatory to complete the registration process. There are two agreements: Registry Participation, and FIGmd Agreement which are configured as per registry specification. Both these agreements involve the practice giving permission to the Registry and FIGmd respectively to view and access practice data.

There are two agreement E-signing options
- E-sign the agreement now
- E-sign the agreement later

---

* Between the Registry and FIGmd.

* Between FIGmd and Practice
### E-sign

The E-signing tool is an online **electronic signature** service to facilitate the user to **sign** a document digitally. Options of E-sign include tools such as DocuSign, EchoSign, or RightSignature.

<table>
<thead>
<tr>
<th>E-sign the agreement now</th>
<th>E-sign the agreement later</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use this option to sign the agreement in real time if you are the authorized signatory and would like to sign the agreement right away.</td>
<td>Use this option if you are not the authorized signatory or would like to review the agreement and sign it at a later date or time.</td>
</tr>
<tr>
<td><strong>Steps:</strong></td>
<td><strong>Steps:</strong></td>
</tr>
<tr>
<td>1. Select E-sign now agreement signing option.</td>
<td>1. Select E-sign later agreement signing option.</td>
</tr>
<tr>
<td>2. Initiate E-Signature process.</td>
<td>You receive an email with an Agreement link.</td>
</tr>
<tr>
<td>3. Create E-Signature.</td>
<td>2. Click the Agreement link in the email.</td>
</tr>
<tr>
<td>4. Sign the agreement.</td>
<td>3. Initiate E-Signature process.</td>
</tr>
<tr>
<td>5. Accept Terms &amp; Conditions to complete the signing process.</td>
<td>4. Create E-Signature.</td>
</tr>
<tr>
<td></td>
<td>5. Sign the agreement.</td>
</tr>
<tr>
<td></td>
<td>6. Accept Terms &amp; Conditions to complete the signing process.</td>
</tr>
<tr>
<td></td>
<td>You receive a confirmation email.</td>
</tr>
<tr>
<td>6. (Optional) Review signed agreement.</td>
<td>7. (Optional) Review signed agreement.</td>
</tr>
</tbody>
</table>

The agreement grid is updated with the agreement details. An agreement is in the **Pending** status till it is signed.
Regenerate option enables the authorized signatory to re-sign an already signed agreement. An agreement not signed in the first place, or change in the authorized signatory, are the possible reasons for re-signing.

To re-sign an agreement:
1. Click **REGENERATE**.
2. Select the appropriate signing option, E-sign now or E-sign later.
3. Follow the steps mentioned in the [Signing Process](#).

**Optional**: Click **REFRESH** to update the agreement status in the grid.

**Note**:
- On re-signing the agreement, the previously signed agreement record is discarded (struck out), and a new agreement record with status as **Pending** is added to the grid.
- Download the signed agreement for your reference.
Milestone 5: Payment
5. Payment

Payment is the last milestone of the sign-up process. In this milestone, you can select a plan for the enrolling year and pay for it as per the number of participating clinicians.

There are three sections to the payment process:
- Subscription Plans (configurable as per Registry)
- Participating Clinicians
- Payment Summary
1. Subscription Plans

Subscription Plans displays available subscription plans:
Each plan includes specific pre-selected modules.

2. Participating Clinicians

Participating Clinicians option displays a list of all the clinicians who are added in the Clinician milestone, along with the total amount payable.

Base Plan is autoselected.

- Select the appropriate Plan.
  Successful plan selection navigates to the Participating Clinicians section.

- Click CHANGE PLAN, if you wish to change the default subscription plan.
- Click NEXT.
  Navigates to the Payment Summary page.

Note:
- Non-participating clinicians can be removed from the list using the delete icon and the total payment amount is altered accordingly. These clinicians are only removed from the participating clinicians list and not from the clinicians milestone.
3. Payment Summary

Payment Summary section allows review of the captured payment details before initiating the payment process.

<table>
<thead>
<tr>
<th>Selected Plan</th>
<th>Plan Type</th>
<th>Total Clinicians</th>
<th>Selected Year</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>BasePlan</td>
<td>Pull</td>
<td>1</td>
<td>2020</td>
<td>$X</td>
</tr>
</tbody>
</table>

1. Verify the displayed payment details.
2. Click **REVIEW TO PAY**.
   - Navigates to the **Make Payment** page.
3. Select the registration term period.

### Credit Card

- Select the Credit Card option.
- Provide the card details.
- Click **PAY**.

### Online Cheque Payment

- Select the Online Cheque Payment.
- Provide the bank account (E-check) details.
- Click **PAY**.
## View Payment and Transaction Summary

<table>
<thead>
<tr>
<th>Payment Details</th>
<th>Transaction History</th>
</tr>
</thead>
</table>
| ![Payment Successful!](image)  
Transaction Number : 190  
Amount Paid : $X  
Paid by : Credit Card | ![Payment Summary](image)  
**Transaction History** grid displays details of all the previous payments sorted by the transaction date.  
- Click **FINISH**.  
  **FINISH** button changes to **GO TO MY ACCOUNT** to access the **My Account** page.  
**Note:**  
- Download the transaction history file in the PDF form using icon in the Action column.  
- For **Online Cheque Payment**, the transaction status is initially **Pending**. After receiving clearance from the bank, it changes to **Successful**.  |

- Success message is displayed on a successful payment.  
- Click **CLOSE**.  
  Navigates to the **Transaction History** grid.
## Post Sign-Up

On a successful payment, two emails are received at your registered email address.

- **Payment Successful**
- **Enrollment Completion**

<table>
<thead>
<tr>
<th>Payment Successful</th>
<th>Enrollment Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Payment Successful" /></td>
<td><img src="image" alt="Enrollment Completion" /></td>
</tr>
<tr>
<td><strong><a href="mailto:demo.pegasus@bot.figmd.com">demo.pegasus@bot.figmd.com</a></strong> to me</td>
<td><strong><a href="mailto:demo.pegasus@bot.figmd.com">demo.pegasus@bot.figmd.com</a></strong> to me</td>
</tr>
<tr>
<td>Mon, May 4, 3:28 PM</td>
<td>Fri, May 22, 6:56 PM (4 days ago)</td>
</tr>
</tbody>
</table>
| **Hello Demo Admin,**  
Thank you for using the BasePlan for 1 Providers.  
We have successfully processed your payment of $X.  
You can access your subscription information from your google.com  
If you have any further questions please visit our help Center or contact to support team. | **Dear Demo User,**  
You have successfully enrolled in the TEST. Your username is Demo User  
Use the link below to login TEST dashboard.  
https://pegasus2.figmd.com/signup/login  
For any further assistance, please contact your Client Account Support (CAS) team at <RegistryName>cams@figmd.com.  

| **Payment Successful** email contains the details of your subscription plan and payment. | **Enrollment Completion** email contains your username and a link to access the Pegasus dashboard. |
Forgot Password

Register to the FIGmd Sign-Up portal using the link provided.

**Step 1: Access Link**

**Login**

- User Name *
- Password *

New user? REGISTER HERE

- FORGOT PASSWORD
- LOGIN

**Step 2: Forgot Password**

- FORGOT Password

  - User Name *
  - Email Address *

  - SUBMIT

**Optional Step**

- Email has been sent on your registered email address. Please check your Inbox emails for link

  - RESEND EMAIL

Click **FORGOT PASSWORD**, if you forgot your password.

- Provide username and email address.
- Click **SUBMIT**.

Click **RESEND EMAIL**, if you have not received the email.
<table>
<thead>
<tr>
<th>Step 3: Password Reset Link</th>
<th>Step 4: Set Password</th>
<th>Step 5: Access Login Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TEST Password Reset</strong></td>
<td><strong>Set Password</strong></td>
<td><strong>Password Created Successfully</strong></td>
</tr>
<tr>
<td><a href="mailto:demo.pegasus@bot.figmd.com">demo.pegasus@bot.figmd.com</a></td>
<td><strong>Set Password</strong></td>
<td><strong>LOGIN</strong></td>
</tr>
<tr>
<td></td>
<td>Set Password*</td>
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<td><strong>........</strong></td>
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<td>Confirm Password*</td>
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<td><strong>SUBMIT</strong></td>
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</tbody>
</table>

- Click on the link provided in the email to set our password.
- Set your password as per the password criteria.
- Click **SUBMIT**.

**Note:**
- Green checkmark indicates that the password criteria has been met.
- Red X indicates that the password criteria has not been met.
- Click **LOGIN** to access the login page.