

These instructions will walk you through creating your Username and Password on your initial login and how to access the DASH Client Portal once you have those items setup.

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Original Email Communication

1. The original email will be titled “Welcome to the DASH Client Portal”
2. Click on the highlighted **here** in the third sentence to begin activating your account



Hello John Doe,

Your request for DASH Client Portal access has been processed.

Your username is: john@company.com

Click [here](#) to activate your account.

[How to log into the DASH Client Portal](#)

Thank You,

RSM Managed Services



JOIN THE CONVERSATION

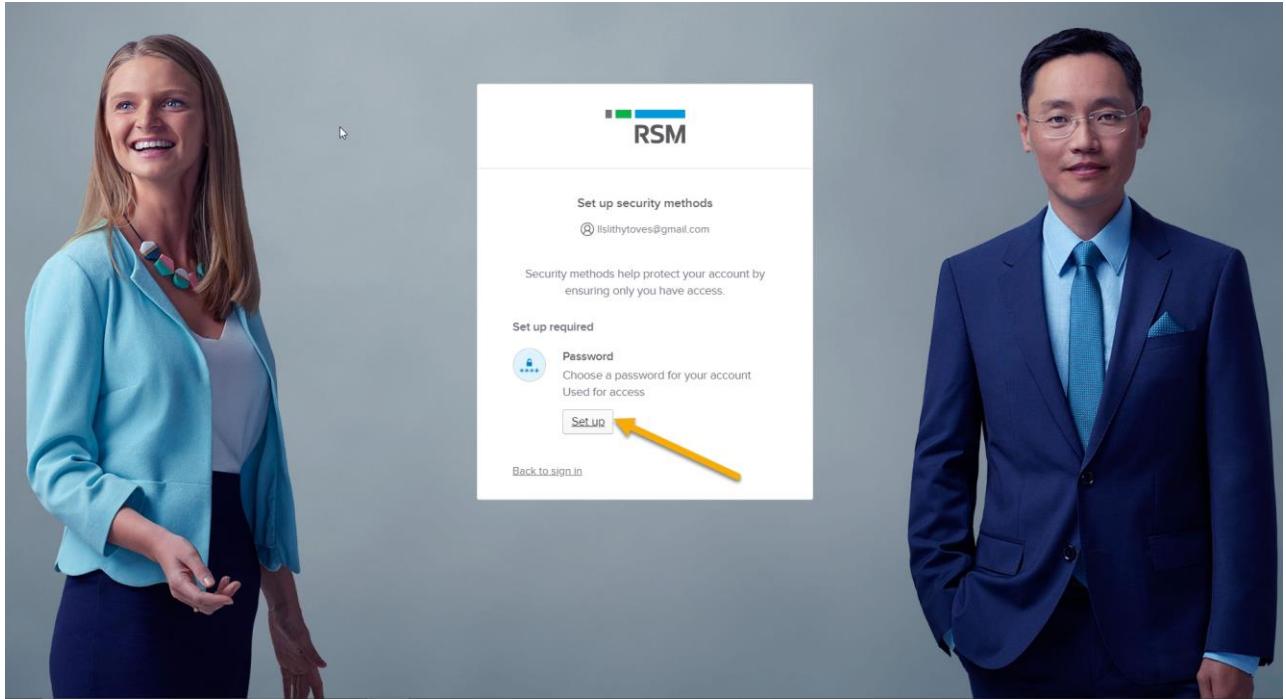
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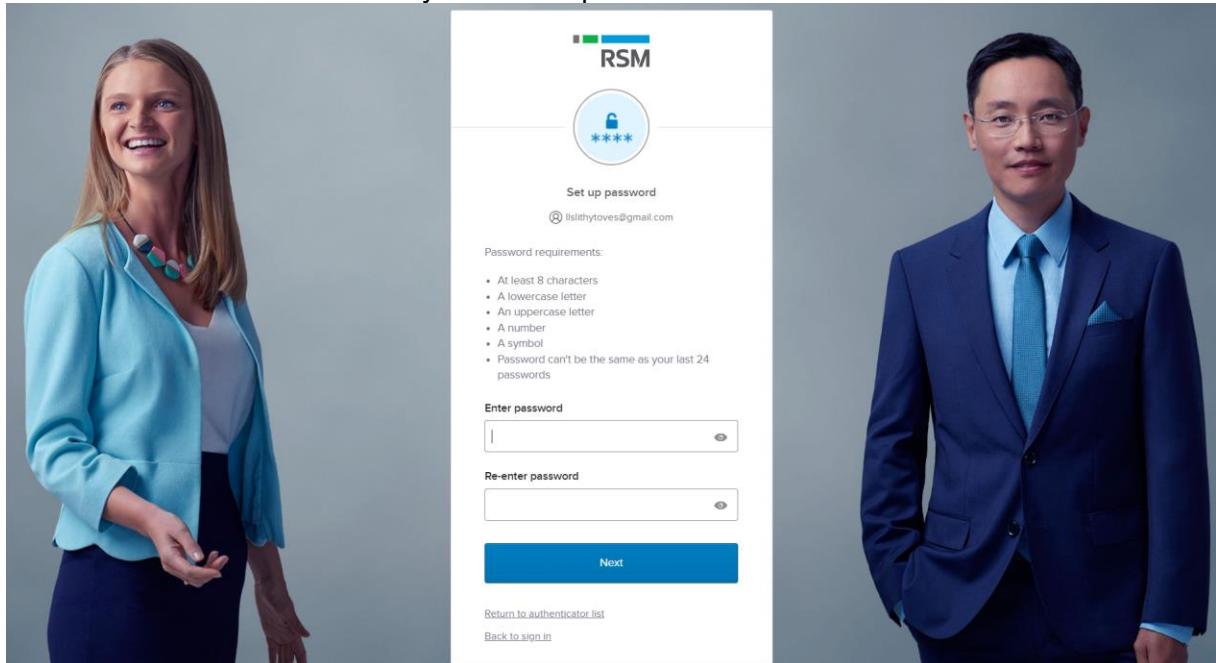
LEARN MORE

3. You will be brought to a screen asking you to **Set up security methods**,
4. click the **Set up** button.



5. Setup a password on the next screen with the following criteria:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- Password can't be the same as your last 24 passwords

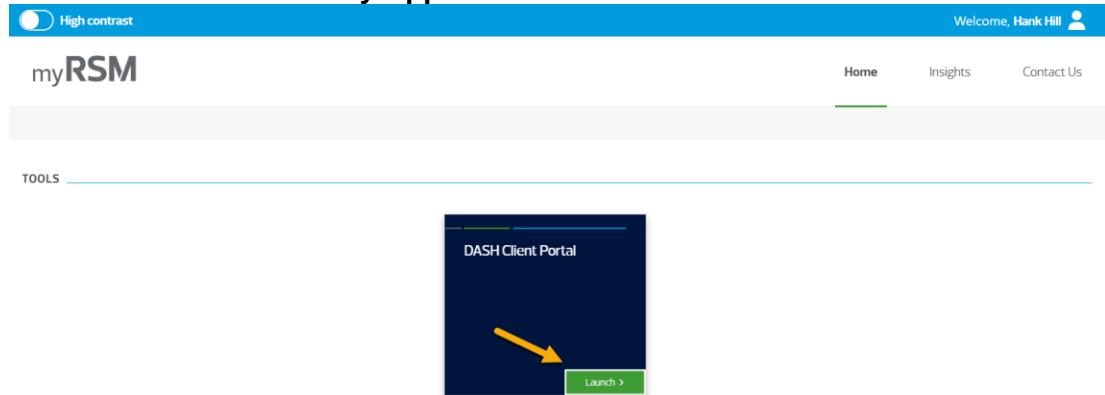


6. Enter the password and Re-enter the password and click **Next**

Next

7. The following screen will only show upon account creation, to get to the DASH Client Portal click on the **DASH Client Portal tile** under **Select an application to continue**

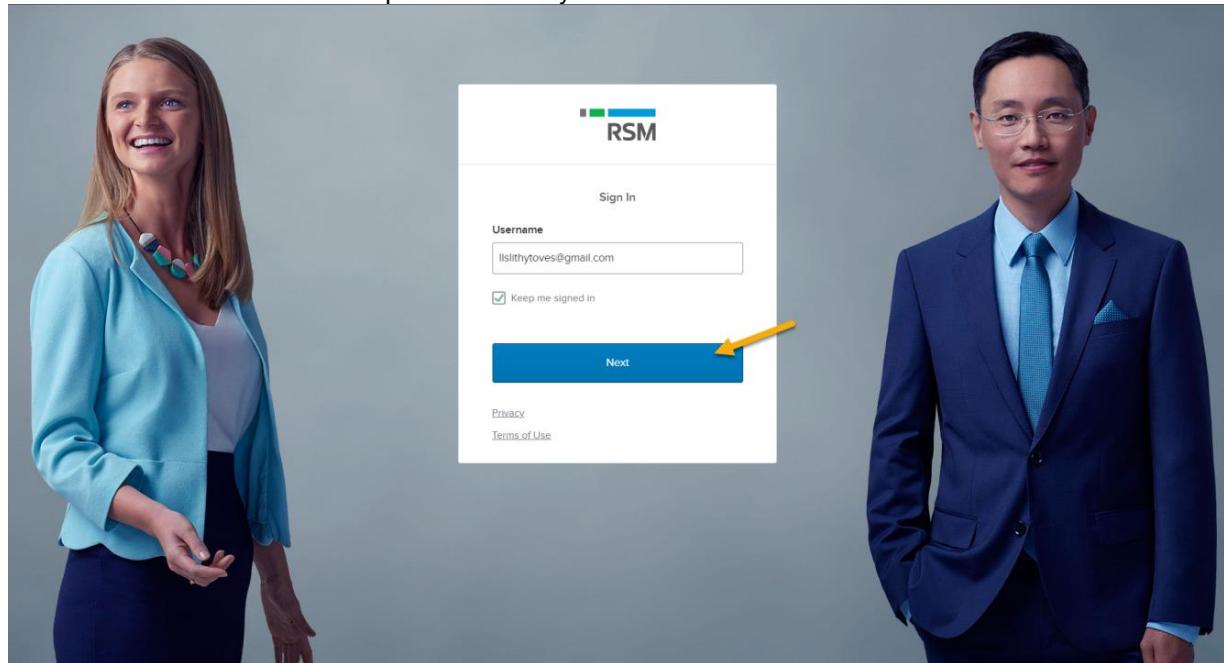
- **NOTE:** If you are setup with any other applications within RSM you may see more than one tile under **My Apps**



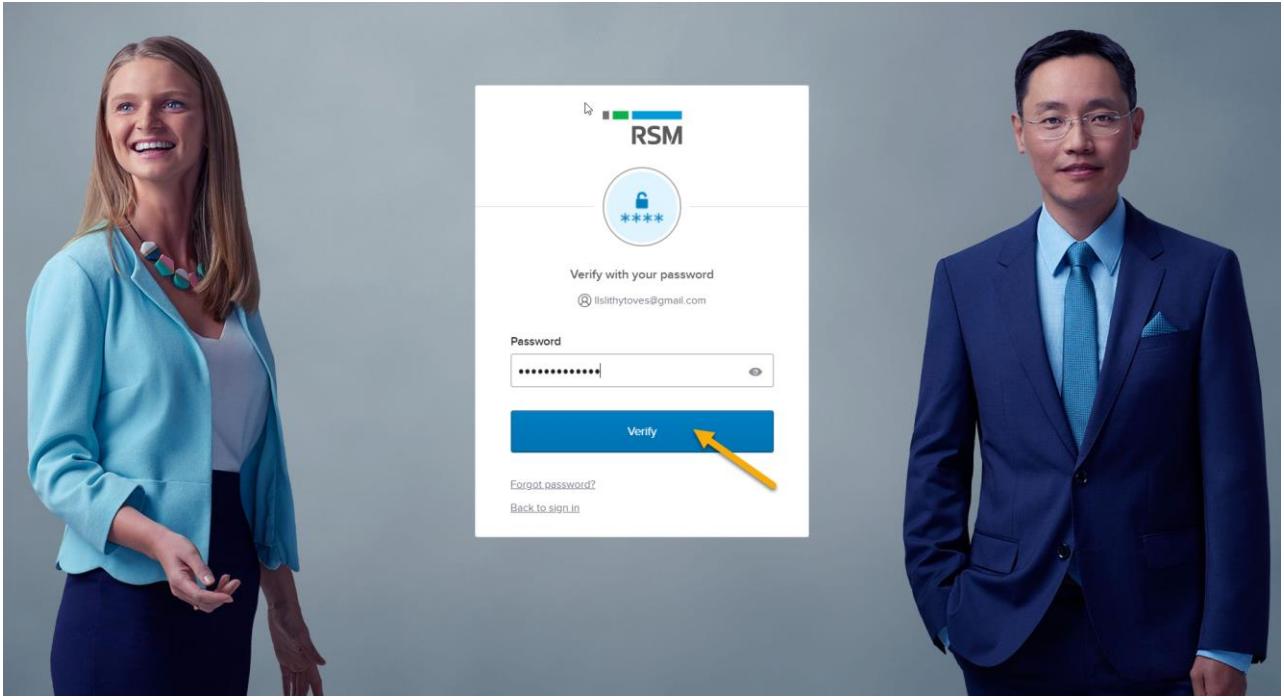
The screenshot shows the myRSM dashboard. At the top, there is a blue header bar with the word 'Next' in white. Below the header, a list of applications is shown under the heading 'Select an application to continue'. One application, 'DASH Client Portal', is highlighted with a yellow arrow pointing to its 'Launch' button. The dashboard also includes a 'High contrast' toggle, a 'Welcome, Hank Hill' greeting, and navigation links for 'Home', 'Insights', and 'Contact Us'.

Future Portal Logins

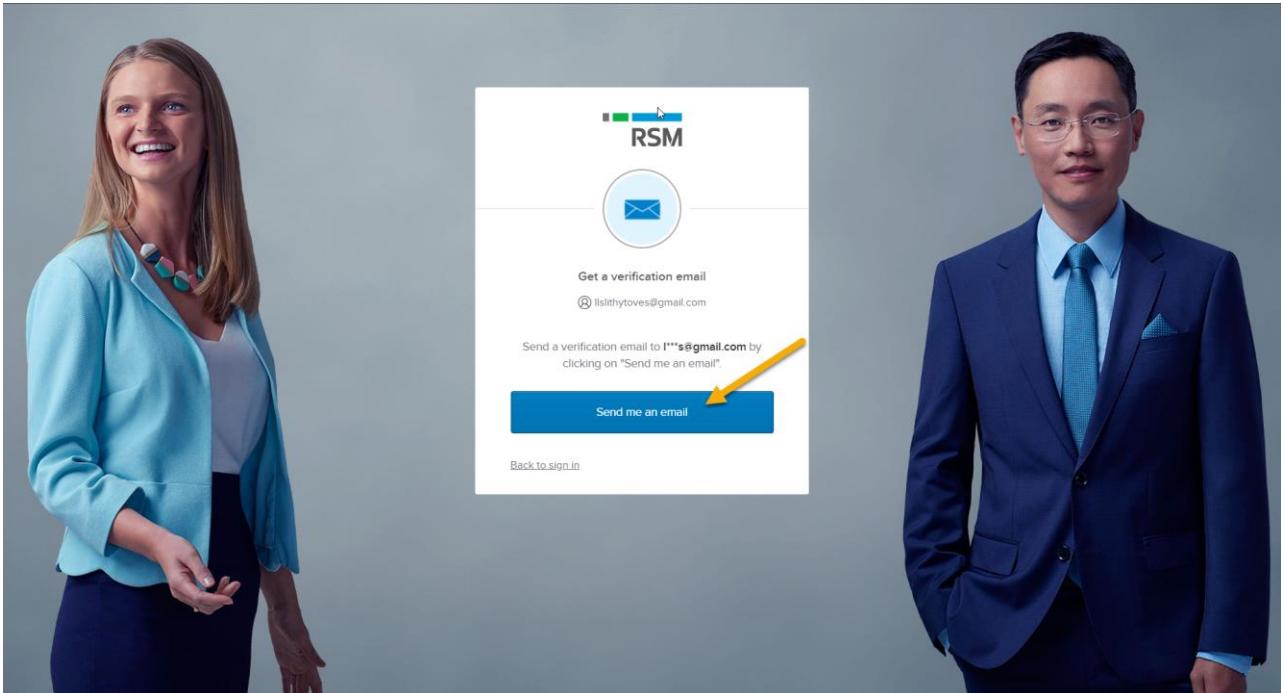
1. Go to <https://dash.rsmus.com/csm>
2. Enter your email address in the **Username** field and click **Next**
 - **NOTE:** Clicking the **Keep me signed in** checkbox will allow you to login without dual authentication on the same computer for 30 days



3. Type your password and click **Verify**



4. On the next screen click **Send me an email**



5. Go into your email and find the "One-time verification code" from noreply@login.rsmidentity.com



Action Required: One-time verification code

Hello Tifa,

You are receiving this email because a request was made for a one-time code that can be used for authentication.

Please enter the following code for verification:

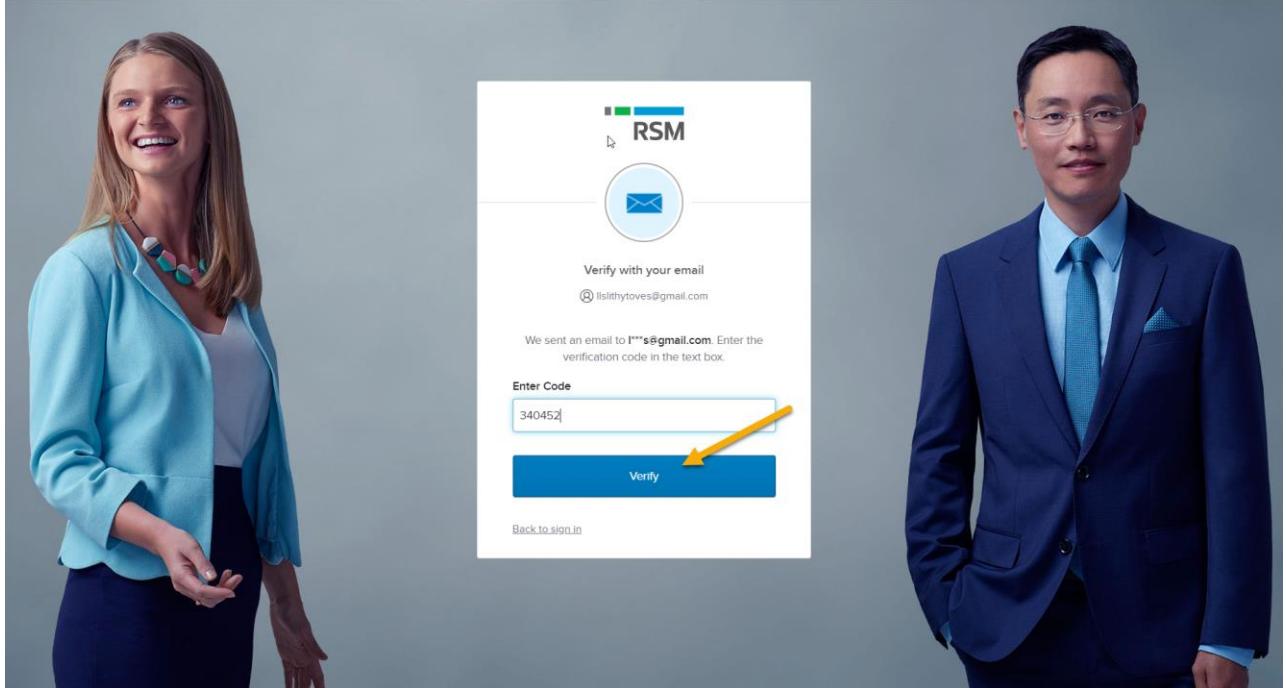
340452

This is an automatically generated message, replies are not monitored or answered.

For technical assistance please contact the RSM Service Desk at

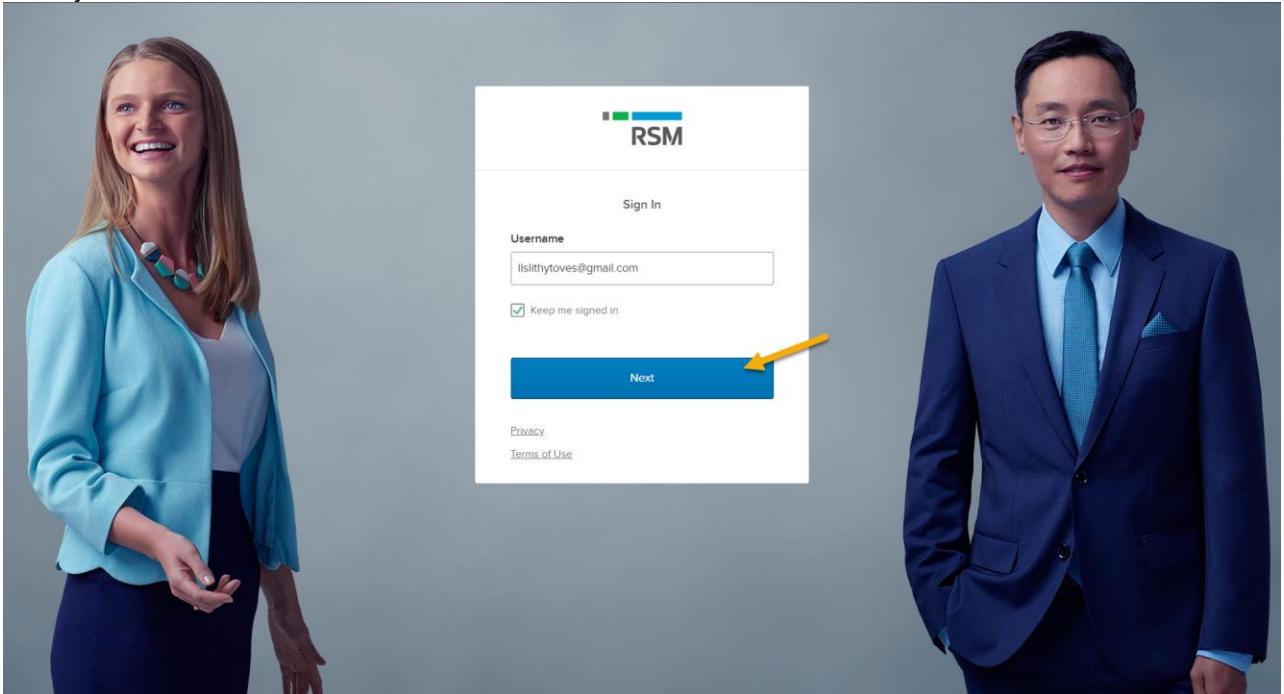
RSMServicedesk@rsmus.com or 833-518-3394.

6. Enter the code and click **Verify**

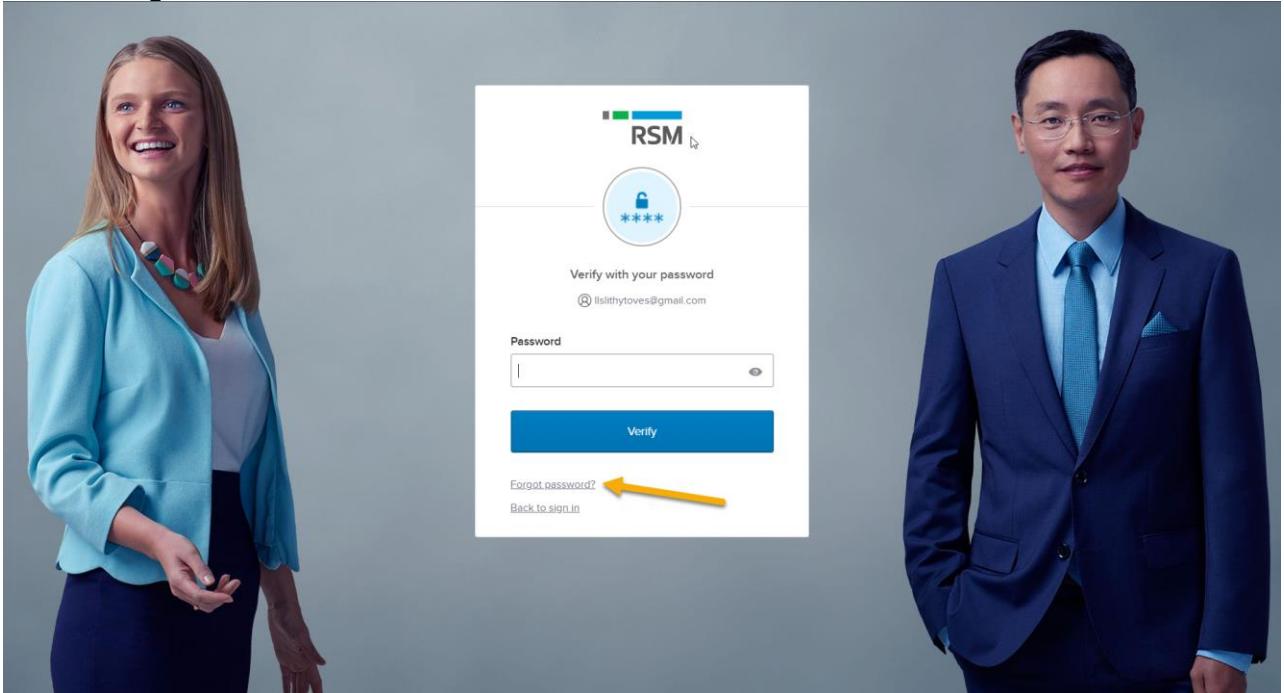


Reset Password

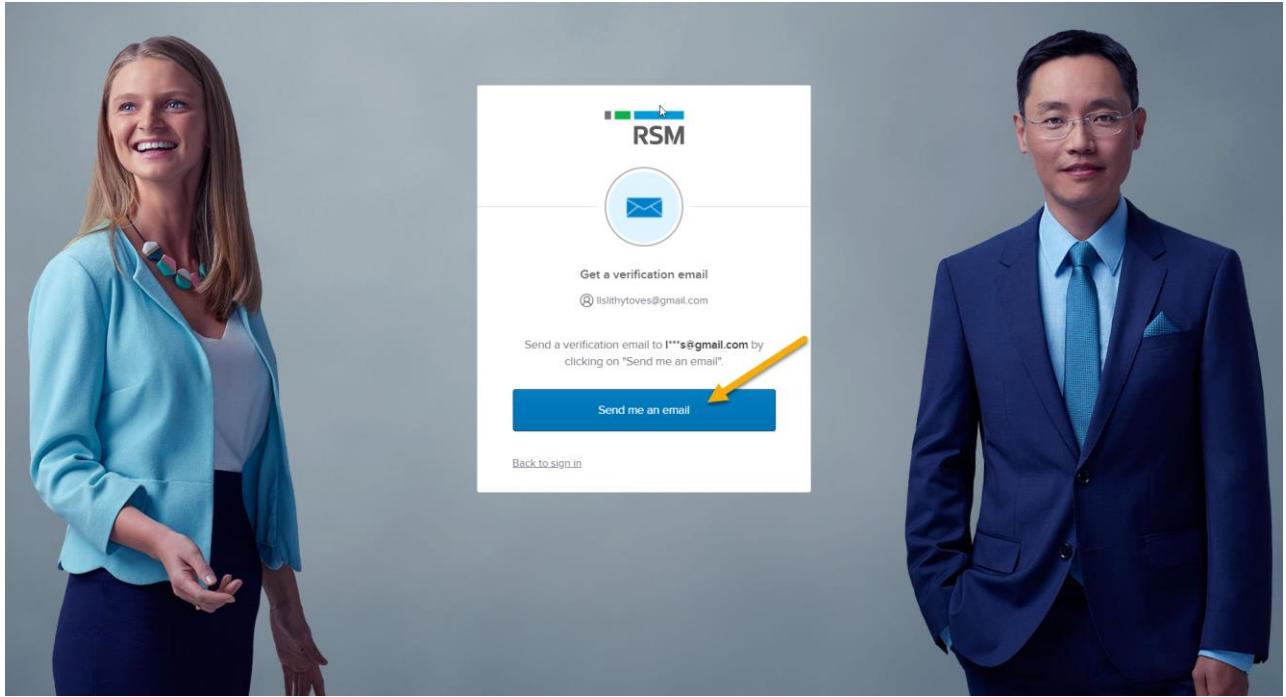
1. Go to <https://dash.rsmus.com/csm>
2. Enter your email address in the **Username** field and click **Next**



3. Click on **Forgot Password?**



4. Click on **Send me an email**



5. Look for an email called "Account password reset" from noreply@login.rsmidentity.com and click on **Reset Password**

RSM

Password Reset Requested

Hello Tifa,

A password reset request was made for your account. If you did not make this request, please contact your RSM administrator immediately.

Click this link to reset the password for your username, llslithytoves@gmail.com:

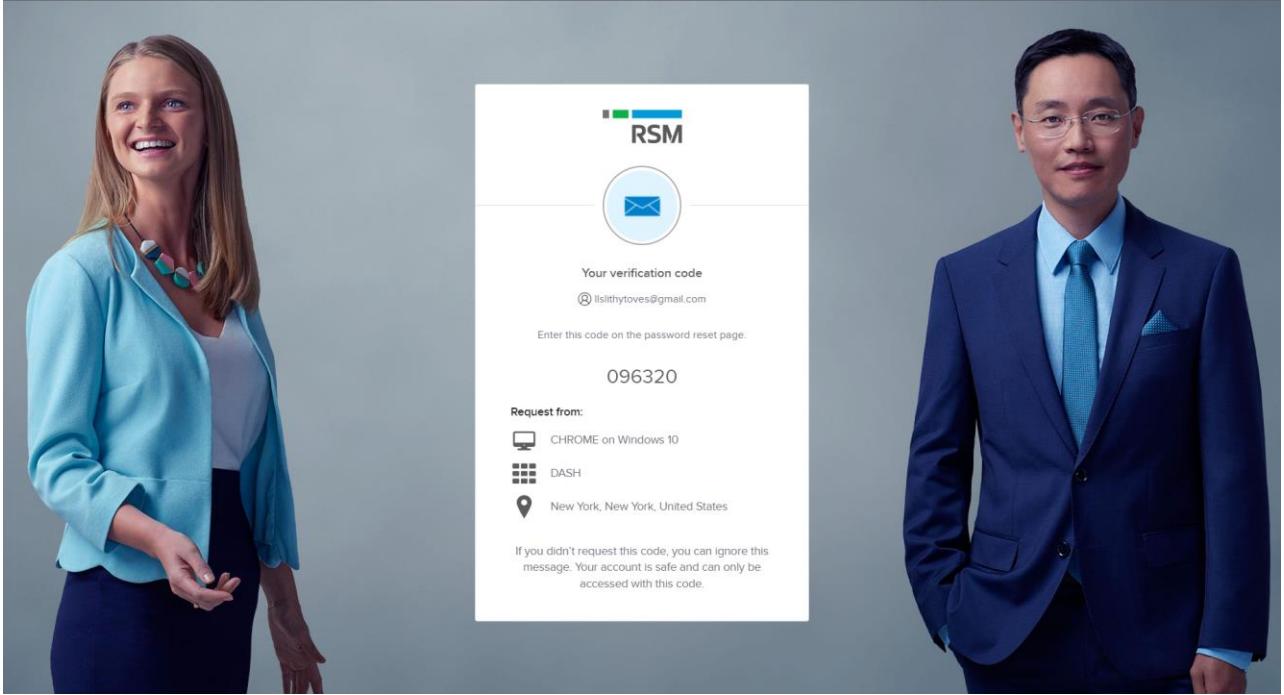
RESET PASSWORD

This link expires in 5 minutes.

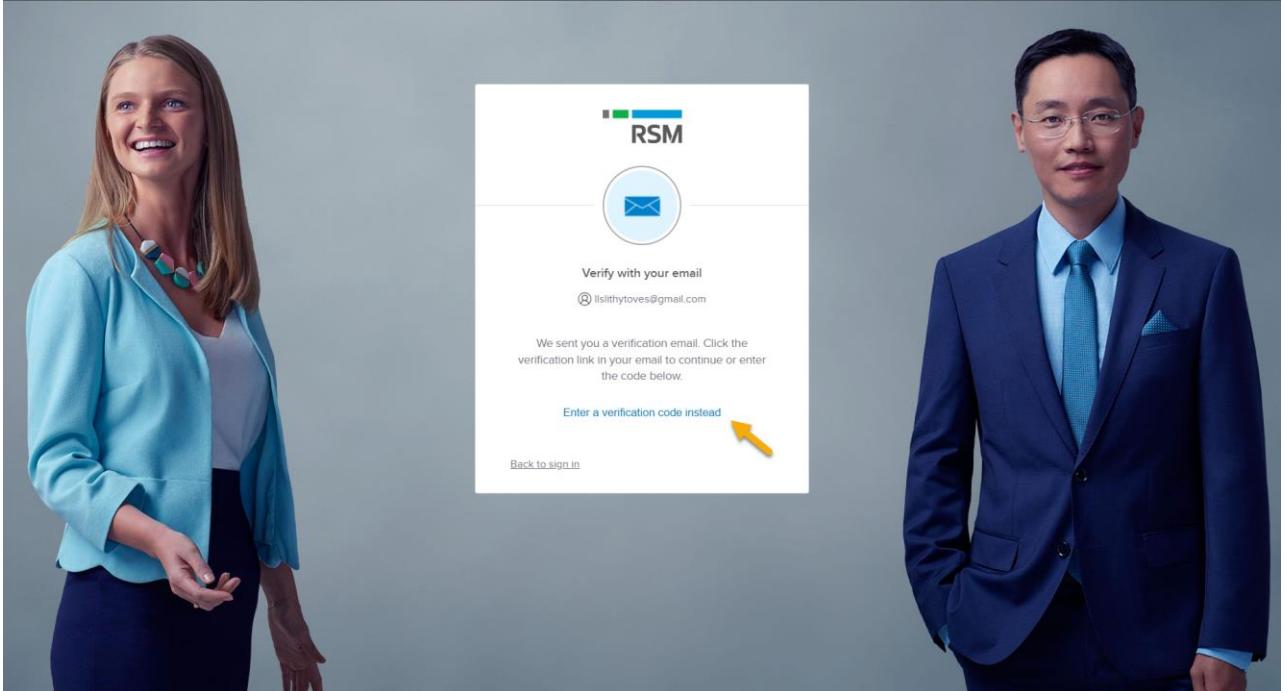
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RSMServiceDesk@rsmus.com or 833-518-3394.

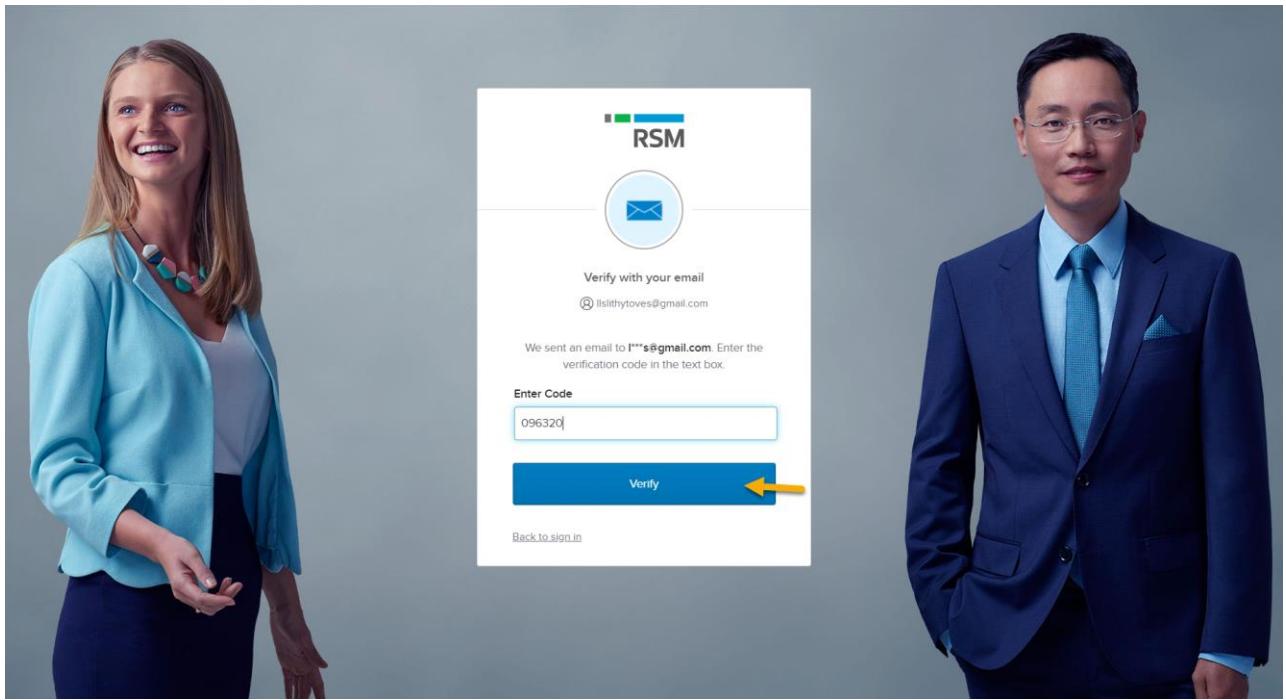
6. You will be redirected to a page that shows you a **Verification Code** to enter on the **Reset Password** page



7. Click on **Enter a Verification Code instead**

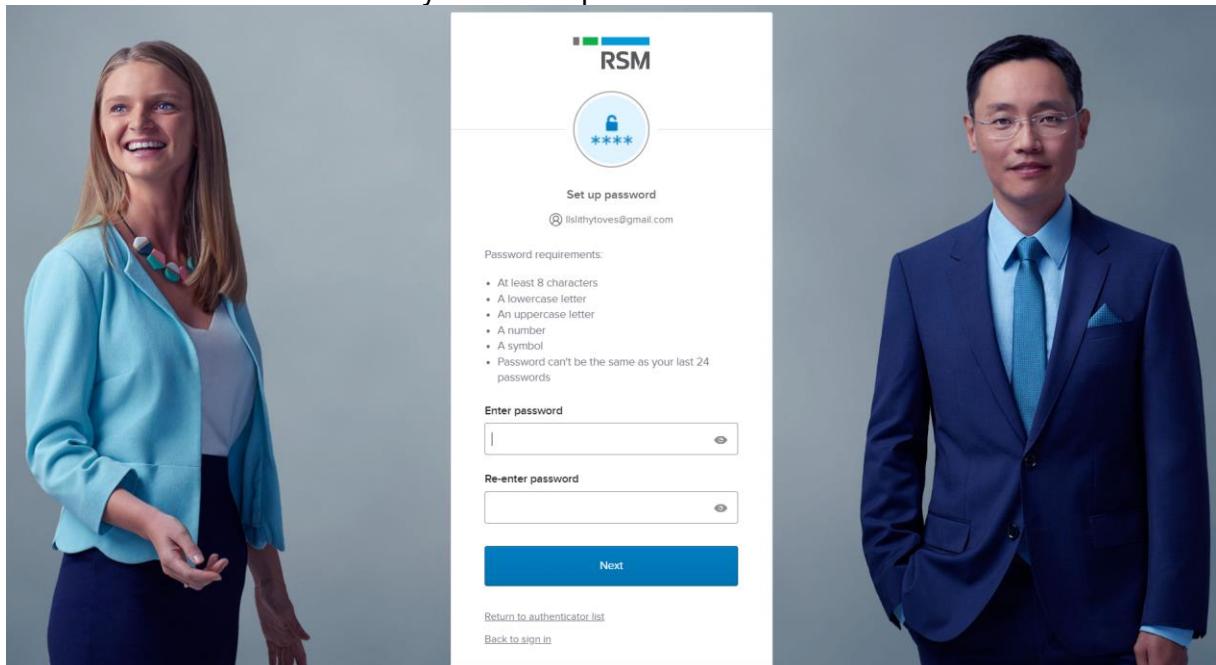


8. Enter the code and click **Verify**



9. Setup a password on the next screen with the following criteria:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- Password can't be the same as your last 24 passwords



10. Enter the password and Re-enter the password and click **Next**

Next