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 RSM Dash Managed IT Services 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



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- 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

RSM	
Set up password (2) Itslithytoves@gmail.com	
Password requirements: • At least 8 characters • A lowercase letter • A number • A number • A symbol • Password can't be the same as your last 24	
passwords Enter password Re-enter password	
Noxt	
Back to sign in	

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

RSM	Q Search your apps	Tifa RSMUS LLP ~
A My Apps		
Select an application to	My Apps	Son V
Add section \oplus	 Select an application to continue 	
Notifications 1	DASH Client Portal	

8. Click myRSM Identity

Please select the appropriate login method from the options below:

myRSM Identity	New: Summer 2024!
Requires your organization to be enrolled	
DASH Identity	Legacy Method
l Don't Know	

For additional help with your login, please click here

Future Portal Logins

- 1. Go to https://dash.rsmus.com/csm
- 2. Choose myRSM Identity

Please select the appropriate login method from the options below:



For additional help with your login, please click here

- 3. 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

RSM	
Sign In Username Itsithytoves@gmail.com	
Keep me signed in Next	
Innax	

4. Type your password and click Verify

N	
RSM	

Verify with your password (இ) IIslithytoves@gmail.com	
Password	
••••••	
Verify	
Eorgal password?	
Back to sign in	

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



6. Go into your email and find the "One-time verification code" from <u>noreply@login.rsmidentity.com</u>

RSM

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 <u>RSMServiceDesk@rsmus.com</u> or 833-518-3394.

7. Enter the code and click Verify



Reset Password

- 1. Go to https://dash.rsmus.com/csm
- 2. Choose myRSM Identity

Please select the appropriate login method from the options below:



For additional help with your login, please click here

3. Enter your email address in the Username field and click Next



4. Click on Forgot Password?

Verify with your password (2) Isithytoves@gmail.com	
Pessword	
Venty Forgot password?	
Elack to sign in	

5. Click on Send me an email



6. Look for an email called "Account password reset" from <u>noreply@login.rsmidentity.com</u> and click on **Reset Password**



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.

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

For technical assistance please contact the RSM Service Desk at <u>RSMServiceDesk@rsmus.com</u> or 833-518-3394. 7. You will be redirected to a page that shows you a **Verification Code** to enter on the **Reset Password** page



8. Click on Enter a Verification Code instead



9. Enter the code and click Verify



- 10. 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

RSM	
Set up password () lisithytoves@gmail.com Password requirements:	
At least 8 characters A covercase letter An uppercase letter A number A number A symbol Password can't be the same as your last 24 passwords	
Enter password	
Next Return to authenticator.list Back to sign in	

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

Next