



SIAM – Single Identity and  
Access Management

# Single Identity and Access Management

User Self-Service Guide

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# Migrating Your Account

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This section is applicable, only if you are an existing user of Advisory Board products and if your account access was migrated from the old system to this new platform.

Once your Advisory Board product is migrated to the SIAM platform, you will be redirected to the new login page from your existing product-specific link. Upon login, you are expected to complete the below indicated steps to link your existing account.

If you need any assistance for logging in, then please contact [crimsonsupport@advisory.com](mailto:crimsonsupport@advisory.com) or (855) 372 8896.

A screenshot of a login form titled "Sign in securely." It contains two input fields: "Username" and "Password". The "Password" field has a "Forgot Password?" link next to it. Below the fields is a checkbox labeled "Remember me" and a blue "Sign in" button.

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SIAM.2019.01.00.55

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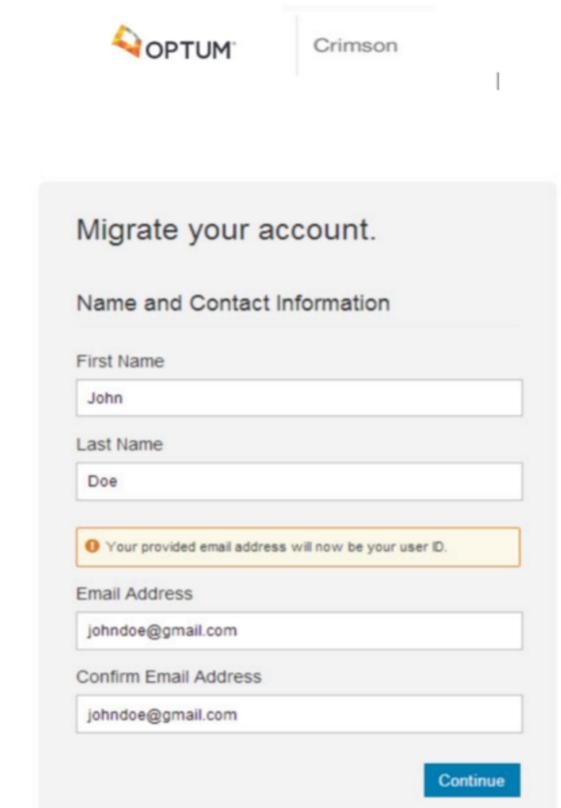
## Logging in to your migrated account:

1. Enter your existing login name and password. Once you have logged in with your existing credentials, you will follow a three-step process to complete account set up.
2. A set of instructions will appear, explaining the three steps of the process:
  - Confirm your personal information
  - Set up validation information and security questions for future user security needs
  - Set up your password

# Updating User Profile

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Updating your user profile is step one of the migration progress.



The screenshot shows the Optum Crimson migration interface. At the top, the Optum logo and the word "Crimson" are visible. The main heading is "Migrate your account." Below this is the section "Name and Contact Information". It contains several input fields: "First Name" with the value "John", "Last Name" with the value "Doe", "Email Address" with the value "johndoe@gmail.com", and "Confirm Email Address" with the value "johndoe@gmail.com". A yellow warning box with an information icon states "Your provided email address will now be your user ID." A blue "Continue" button is located at the bottom right of the form.

## Updating your user profile:

1. Please confirm your personal information (First Name, Last Name and Email ID). Your Email ID will henceforth be your user name.
2. If you have multiple products, you will be asked to verify your account by answering a validation question (date of birth or mobile number or employee ID). This will make it easy for us set up your account to be able to seamlessly access multiple products through the same login name and password.

# Setting Verification, Password, and Security Questions

Once you have confirmed your user profile, you now need to set the credentials for your user account.

OPTUM Crimson

Migrate your account.

Secondary Authentication ⓘ

Date of Birth

01/28/2001

Back Continue

OPTUM Crimson

Migrate your account.

Set Your Password

New password

\*\*\*\*\*

Verify new password

- Don't include your name or username
- Include at least 8 characters
- Include at least 3 of the following:
  - at least 1 lowercase letter
  - at least 1 capital letter
  - at least 1 number
  - at least 1 special character % , \$ # & , etc.

Set Your Security Questions ⓘ

Question 1

Select security question

Answer

Question 2

Select security question

Answer

Question 3

Select security question

Answer

Back Continue

## Setting verification, password, and security questions

1. Enter your secondary authentication factor/verification questions. If previously set up in your profile, simply confirm the information. If you have not, select one of the three options and fill out the answer:  
Date of Birth  
Mobile Number  
Employee ID
2. Set up a new password; please follow the on-screen instructions. Your password now follows improved guidelines to ensure adequate security.
3. Select any 3 of the 10 security questions and provide your answers against it. These security questions can come handy at a later stage, in case your account gets locked for any reasons or additional validation is needed.
4. That's it! You will be returned to the login page to enter your user name/password just set. Bookmark this URL for easy access: <https://login.crimsonservices.com>

# First-Time Sign In

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Your user account is created and managed by an administrative user from your company or the Advisory Board Company. You click on an activation link sent to you by email to complete a simple 2-step first-time sign-in process.



Activate your account.

What is your Date of Birth? ⓘ

Continue

### First-time sign in process:

1. Confirm it is your account by answering a validation question. This validation question is either your date of birth, phone number or employee ID; based on the information stored in your profile.
2. Set up a new password and security questions.

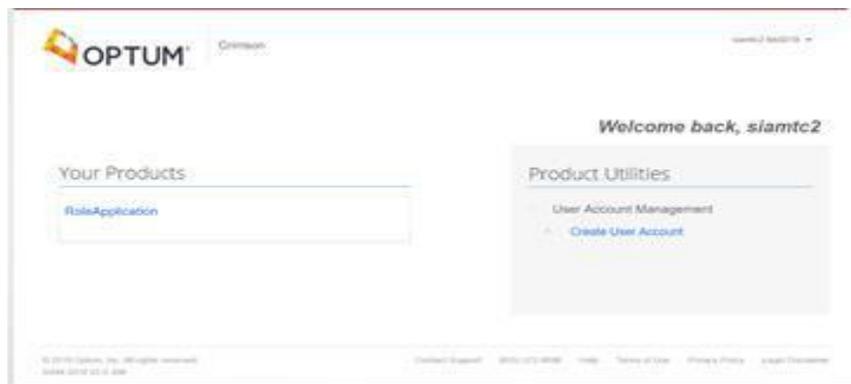
# Normal Sign In

Once you have successfully set up your user account, you can access your Advisory Board products by signing into the Crimson login page – <https://login.crimsonservices.com/>. Please bookmark this URL for easy access. Now you can get seamless access to all Advisory Board products using the same login name and password.

A screenshot of the "Sign in securely" form. It includes fields for "Username" and "Password", a "Remember me" checkbox, and a "Sign in" button. A security warning at the bottom states: "For improved security, keep this box unchecked on public or shared devices." The "Remember me" checkbox is checked.

## Regular sign in process:

1. Navigate to <https://login.crimsonservices.com/>.
2. Enter your email address/ username and password.
3. Click **Sign in** to get access to your Advisory Board products
4. If you want your email/user name remembered, check **Remember me** before signing in.
5. If you have more than one Advisory Board product assigned to your account, select the specific product you want to access.
6. While you are signed in, you can navigate between products by clicking on the **Your Products** link on top right widget and then select the product you want to access.
7. If you have only one product assigned to your user account, you will be directly taken to that product.



# Editing My Profile

Your user profile may be edited at any time by clicking the **Your Account** link in the top right widget.

The screenshot shows the 'Your Account' page in the Optum system. At the top left is the Optum logo and the name 'Crimson'. At the top right, the user's name 'siamtc1 feb0419' and a 'Your Products' menu are visible. The main content area is titled 'Your Account' and is divided into three sections: 'Name and Contact Information', 'Secondary Authentication', and 'Additional Info'. Each section has an 'Edit' link. The 'Name and Contact Information' section shows fields for Name (siamtc1 feb0419), Email (siamtc1\_feb0419@mailinator.com), and Username (siamtc1\_feb0419@mailinator.com). The 'Secondary Authentication' section shows a 'Date of Birth' field with the value 09/20/1988. The 'Additional Info' section shows 'None'. To the right of the 'Name and Contact Information' section is a grey box titled 'Account Actions' containing two links: 'Change my password' and 'Change my security questions'.

For security reasons, you cannot change your first name, last name or date of birth. If any of these fields need to be changed in your account, please reach out to the administrative user from your company or the Advisory Board Company. All other information in your profile may be edited.

To help us serve you better, please provide the additional, optional information.

You may also change your password and security questions on this page. See pages 10-11 for more.

# Changing Passwords and Security Questions

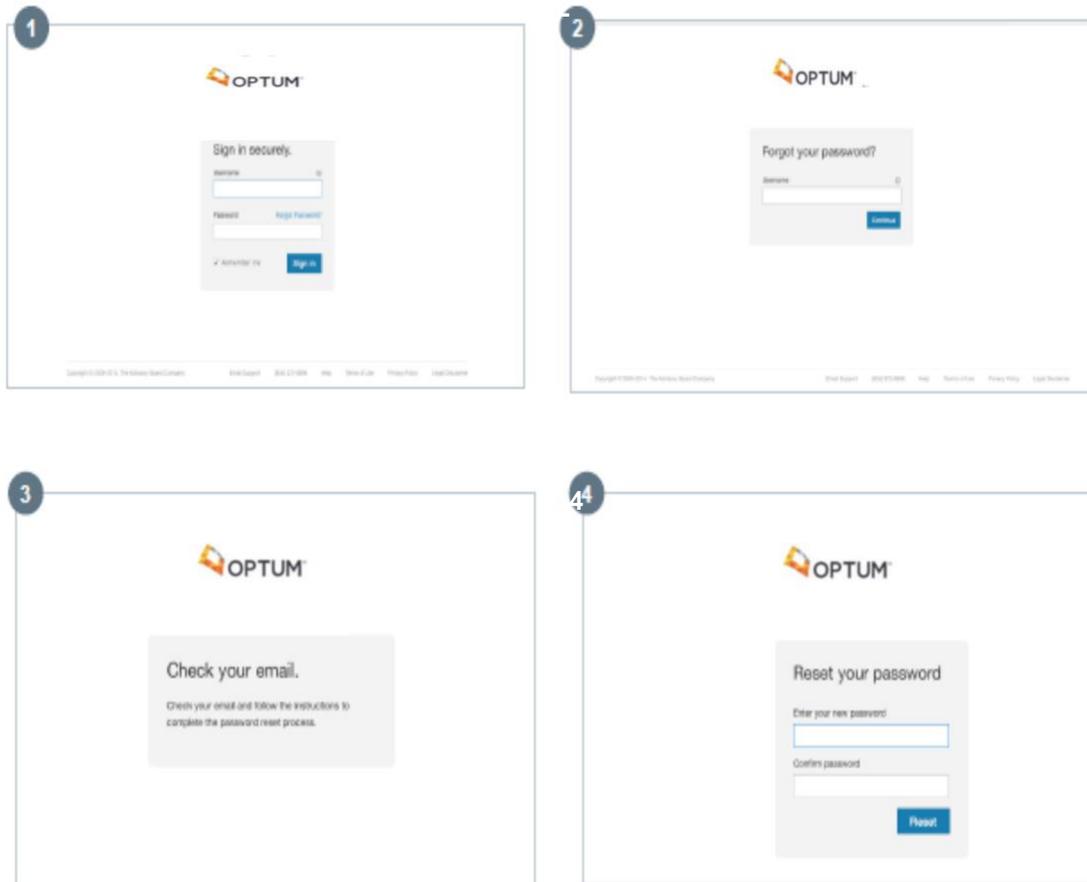
When you are signed in to Advisory Board Company products, you can change your password by clicking on the “Your Account” link in the top right widget and then selecting “Change Password”. Similarly, while you are signed-in, you can change your security questions by clicking on the “Your Account” link in the top right widget and then selecting “Change Security Questions”.

The screenshot displays the OPTUM user account management interface. At the top left is the OPTUM logo and the name 'Crimson'. At the top right, there is a user identifier 'siamtc1 feb0419' and a 'Your Products' menu icon. The main content area is divided into two sections: 'Change Your Password' and 'Change Security Questions'.  
**Change Your Password:** This section includes three input fields: 'Current password' (with a red error message 'Please fill out this field'), 'New password', and 'Verify new password'. Below these fields are 'Save Password' and 'Cancel' buttons.  
**Change Security Questions:** This section prompts the user to 'Please select and answer three security questions below. Answers are not case-sensitive and are required to be at least 4 characters long.' It contains three questions, each with a dropdown menu and a masked text input field:  
- Question 1: 'What city did you meet your spouse/significant other in?'  
- Question 2: 'What school did you attend for sixth grade?'  
- Question 3: 'What city or town was your first job in?' (with the answer 'comauth-admin@gmail.com' visible).  
Below the questions is a 'Confirm Your Password' section with a masked input field and 'Save changes' and 'Cancel' buttons. On the right side of the interface, there are two 'Account Actions' panels. The top panel contains 'View my account' and 'Change my security questions' links. The bottom panel contains 'View my account' and 'Change my password' links.

- You will need to enter your current password to help us validate this action. The password is masked with asterisks for better security.
- Please follow the password guidelines while setting up a new password; a stronger password ensures protection of your identity.
- You can change the selection of your existing security questions or simply change the answers to existing selected questions.
- The current answers to security questions are masked with asterisks for better security

# Forgot Password

Everyone forgets passwords. We want to make it easier for you to reset your password.

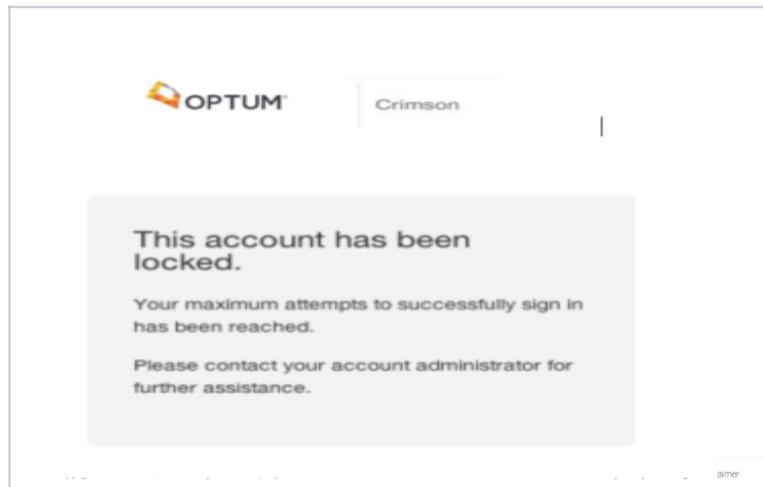


## Resetting a forgotten password

1. Click the **Forgot Password** link on the main login page.
2. Enter your username. If you have already migrated or activated your profile, then your email ID will be the username.
  - a. If you have already setup your account with security questions, then you will be prompted to answer one of three security questions you set during the account activation process. If you answer incorrectly more than 3 times, your account will be locked.
3. You will then receive an email notification with an activation link.
4. After clicking the activation link, you will be brought to a page where you can reset your password. Enter a new password and click **Reset**.

# Account Locked

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User accounts can be locked due to:

- Expired passwords. Advance notice is sent to the user one week before password expiration.
- User with expired password can reset his password by clicking “Forgot Password” on the login page”
- Three (3) failed attempts at signing-in or answering validation / security questions

When a user account is locked, the user will receive a notification by email. You will need to contact your administrator or Advisory Board support to help unlock the account. The administrator will resend you an activation email.

A screenshot of a web form titled "Activate your account." Below the title is the question "What is your Date of Birth? 🌐". There is a text input field containing the placeholder "mm/dd/yyyy". At the bottom right of the form is a blue button labeled "Continue".

When you click on the activation link, you will be brought to a page where you have to confirm that it is your account by answering a validation question. This validation question is either your date of birth, phone number or employee ID; based on the information stored in your profile.

Upon successfully answering the validation question, you will have to reset your password and security questions, following which you will be able to login with the new password.

# Account Reactivation

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Account reactivation follows the same process as that of first time sign in (see page 7). You will receive an activation link and will be required to verify your identity by answering a validation question. Then you will be able to set up your new password and new security questions.

Once the above steps are completed, you will regain access to your account using your registered email id and new password.

# Multi-factor authentication

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Multi-factor authentication (MFA) adds another level of authentication for users during the sign-in process, to make accounts more secure. In this case, users have to not only provide their usual credentials, but also a one-time password (OTP) that they receive either in a text message to their preferred mobile device or as an e-mail to the e-mail address associated with their account.

If your organization uses MFA and you select mobile device as your preferred contact method, an enrollment prompt displays after your first successful login.

## To complete enrollment in MFA:

1. After your first successful login, the enrollment prompt displays.
2. Enter your preferred mobile phone number. This is where you will receive your one-time password (OTP) via text message.
3. Click **Enroll**.

Note

You must enter a U.S. phone number with the +1 prefix before the area code. The enrollment dialog will display an example using this format, as a reminder. Standard test messaging rates will apply. This phone number will be stored in OneLogin and used for authentication only. It will not be used for client outreach, marketing or any other purposes.

Multi-Factor Authentication

Enter the phone number that you would like to use for receiving the One Time Password (OTP) via text message\*

Example: +12345678900

Number Format: +[country code][phone number] with no space

**Enroll**

\* Standard text messaging rates may apply.

4. The verification prompt displays. Enter the OTP you received. The OTP is only valid for five minutes. If you do not receive your OTP within 30 seconds, or your original OTP expires, click **Resend OTP**.
5. If you incorrectly enter your OTP five times, the **Resend OTP** link changes to **Return to Sign in**. You will need to provide your credentials again to generate a new OTP and proceed.
6. Select the checkbox to accept the terms and conditions.
7. Click **Submit**.

**Multi-Factor Authentication**

Please enter the 6-digit OTP Code that has been sent via text to +91 XXXXX X9090\*

Session is valid for 5 minutes.

I accept the [terms and conditions](#)

[Resend OTP](#)

\* Standard text messaging rates may apply.

You will only have to complete steps 1-3 on your first login. On subsequent logins, you will not see the enrollment prompt.

If you selected e-mail as your preferred contact method, you will not have to complete the enrollment process. Your OTP will be sent to the e-mail address associated with your account. On login, you will see the verification prompt.

**Multi-Factor Authentication**

Please enter the 6-digit OTP Code that has been sent via mail to t...b@optum.com

Session is valid for 5 minutes.

Don't ask again on this computer

[Resend OTP](#)

**Note**

If you want to change the phone number or e-mail address you use for MFA, contact support.

# Contact Support

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*Need any assistance with your product access?  
Please contact [crimsonsupport@advisory.com](mailto:crimsonsupport@advisory.com) or (855) 372-8896.*



Try again.

Username ?

Password [Forgot Password?](#)

Remember me

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