Setting up Account Access

eVeroPortal

Registering eVero Account Access

Contact information will be requested by AIM to initiate account access via a do-not-reply email invitation that will expire within 7 days

- To review how to register for eVero account access please review pages 1-3
- If information tied to eVero account requires updating user will contact AIM communicating updated information to then resend a do-not-reply email invitation to register account

Setting up a New Account

Users will verify identity by following steps to set up a new account to enter username and password that is unique to them

- To review how to set up a new account please review pages 4-7
- Please be sure the authentication option selected for sending 6-digit code for verification is available real time to the user

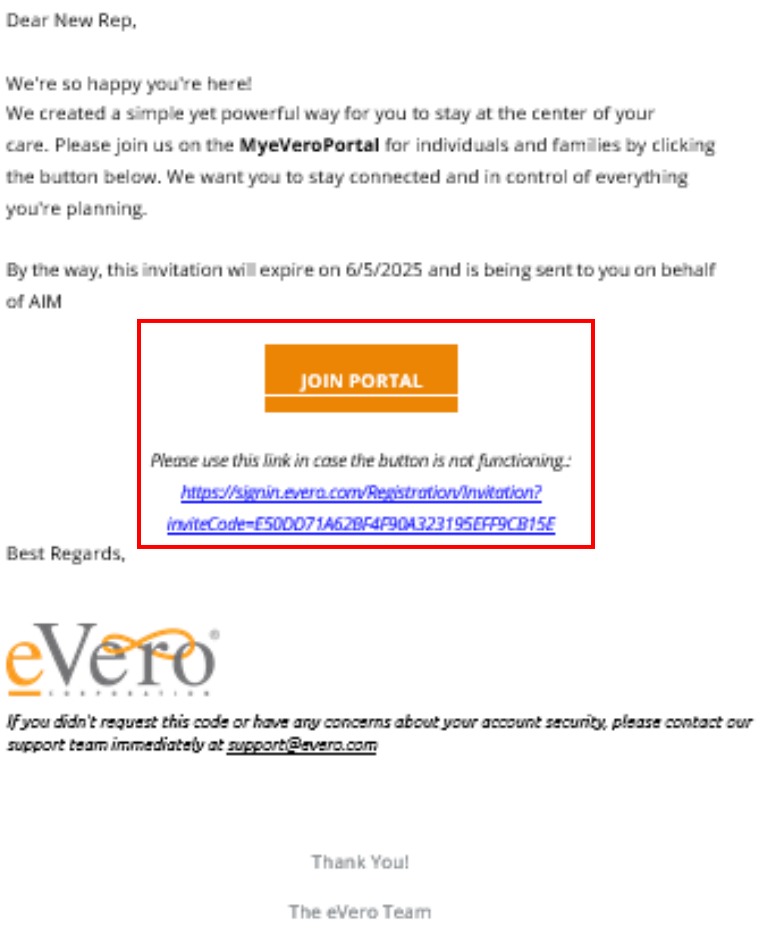
Setting up an Existing Account

Individuals and Representatives can have one account set up for multiple people in the SD program. Contact information will be requested by AIM to initiate account access via a do-not-reply email invitation that will expire within 7 days

- To review how to set up an existing account please review pages 7-10
- User will verify existing username, password, and contact information to link existing eVero account
- User can toggle between individuals in eVero on the website once linked

1. AIM team will initiate account set up by sending a request for the following information:
    a. First Name
    b. Last Name
    c. Email Address
    d. Preferred Phone Number
    e. Relationship to Participant

2. AIM team will enter information to send an eVero invitation via a do-not-reply email communication to begin setting up account
3. User will select 'Join Portal' button or link provided in email communication



Dear New Rep,

We're so happy you're here!
We created a simple yet powerful way for you to stay at the center of your care. Please join us on the **MyeVeroPortal** for individuals and families by clicking the button below. We want you to stay connected and in control of everything you're planning.

By the way, this invitation will expire on 6/5/2025 and is being sent to you on behalf of AIM

JOIN PORTAL

Please use this link in case the button is not functioning.:
https://signin.evero.com/Registration/Invitation?inviteCode=E50DD71A62BF4F90A323195EFF9CB15E

Best Regards,

eVero

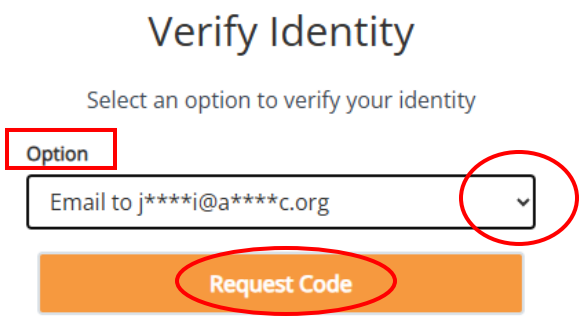
If you didn't request this code or have any concerns about your account security, please contact our support team immediately at support@evero.com

Thank You!

The eVero Team

4. User will verify identity by selecting the following options:
    a. Text Message
    b. Phone Call
    c. Email

5. User will select 'Request Code' to receive security authentication



Verify Identity

Select an option to verify your identity

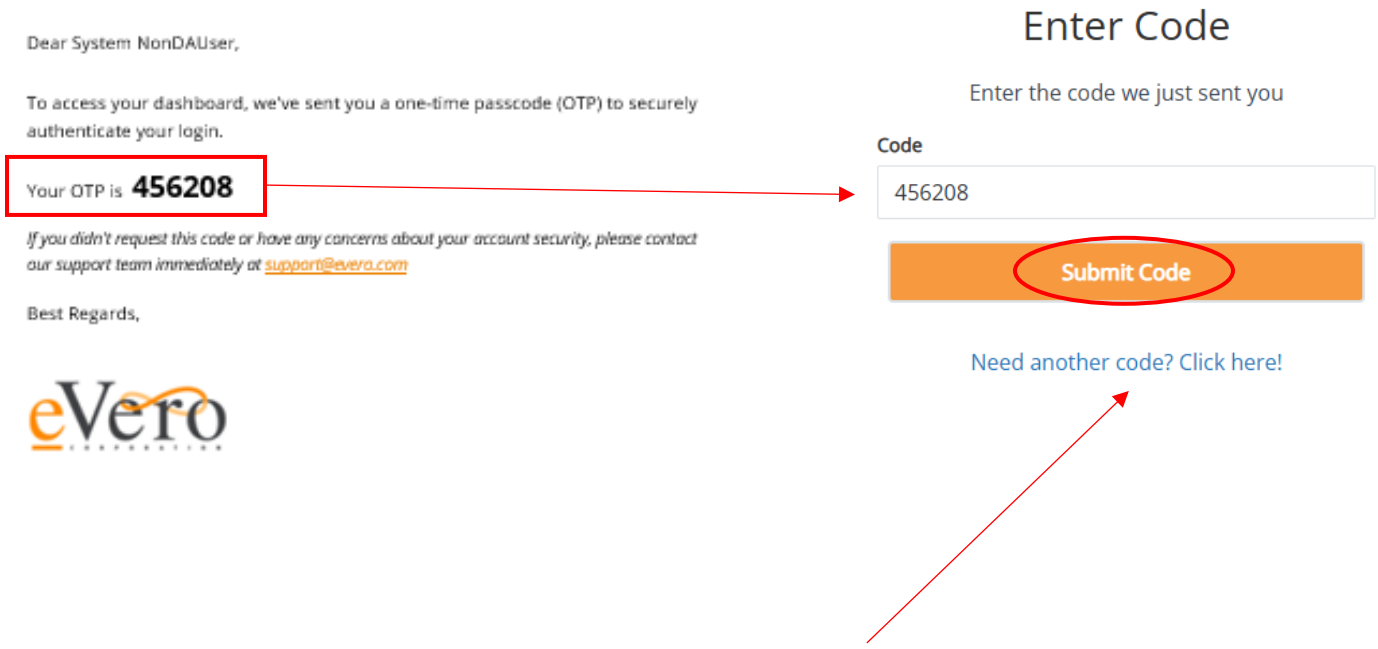
Option

Email to j****i@a****c.org

Request Code

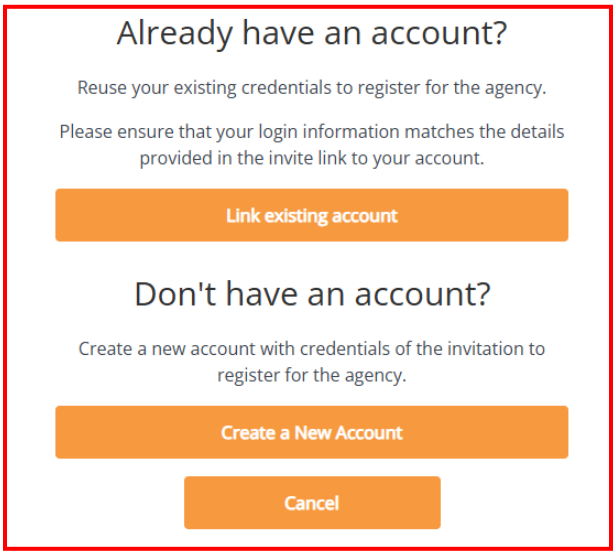
6. User will receive a communication including a one-time passcode for security authentication via selected authentication option
7. User will enter the 6-digit code received
8. User will select 'Submit Code'

Example Communication Email:



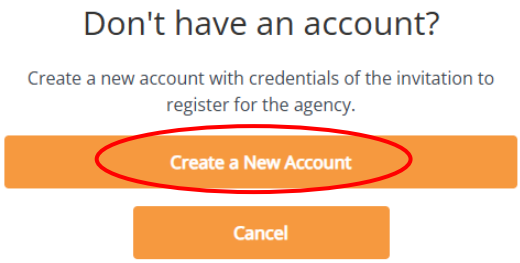
Please note: if code is not received select 'Need another code? Click Here!' hyperlink

9. User will be brought to account registration screen to create account or link existing account

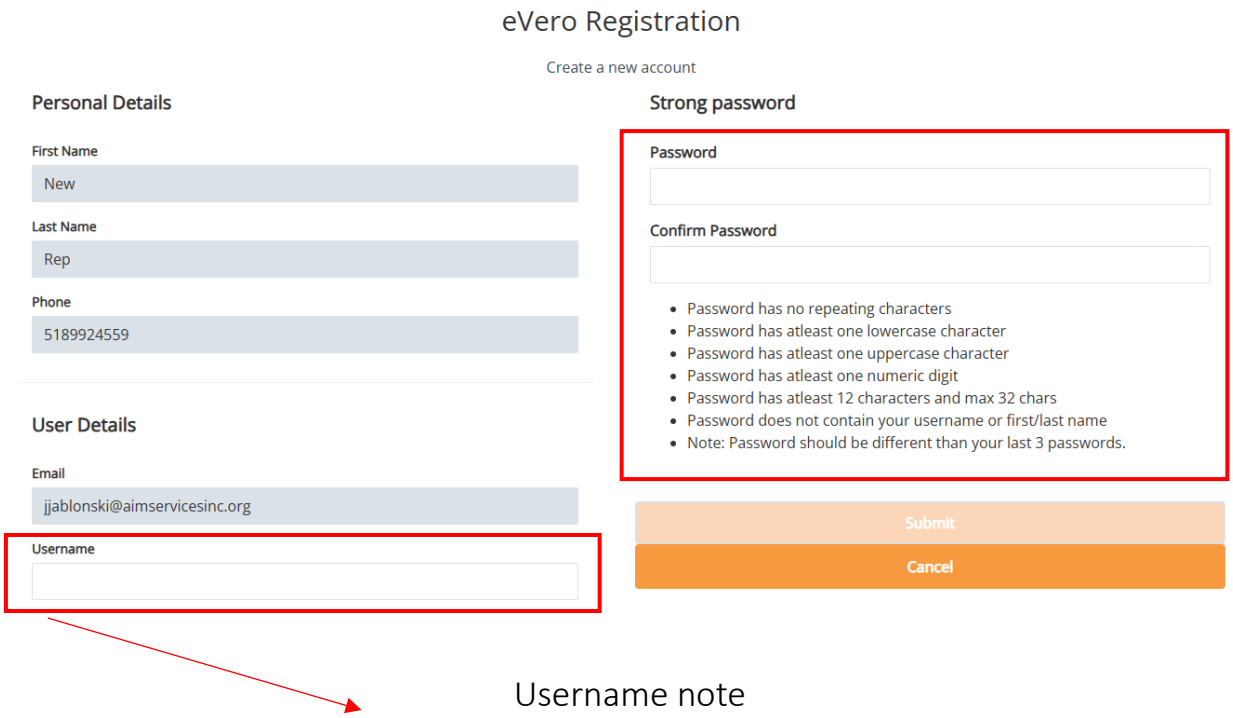


To Create a New Account:

1. User will select 'Create New Account'



2. User will enter username and password

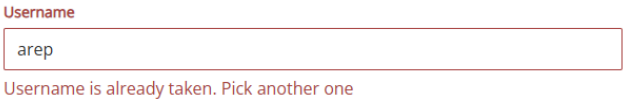


Username note

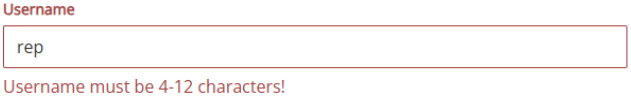
If username is available:



If username is already taken:

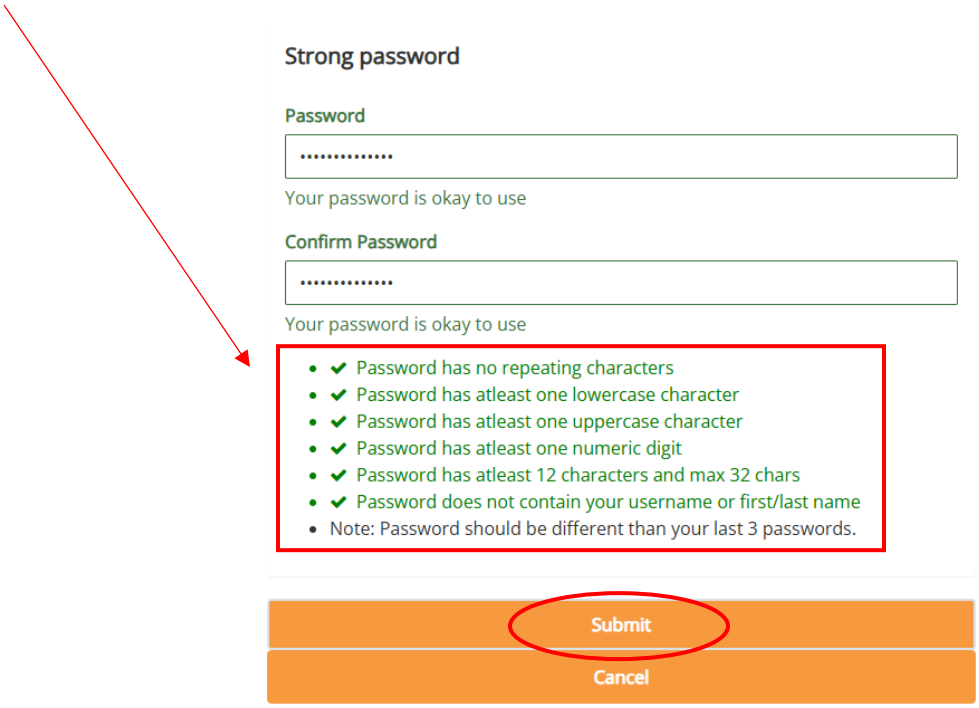


If username is not long enough:

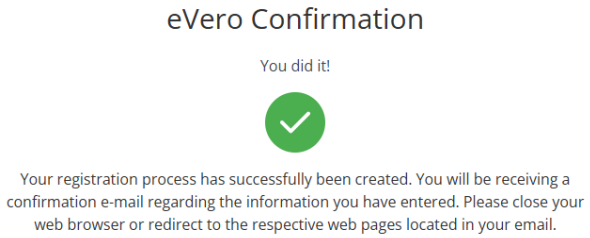


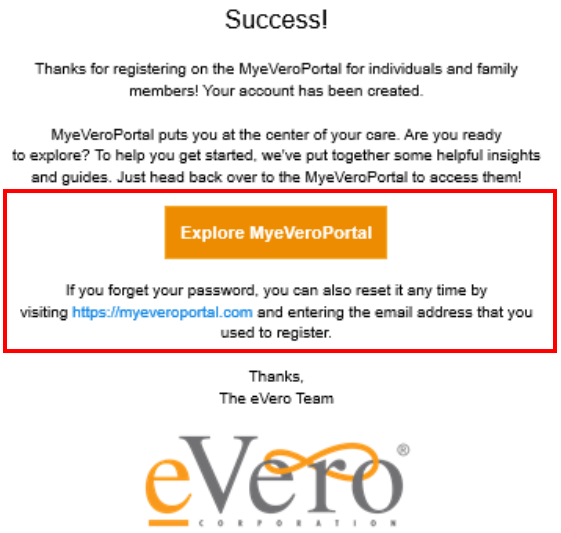
3. User will select ‘Submit’ button

<u>Password requirements must be met to move forward with account registration:</u>

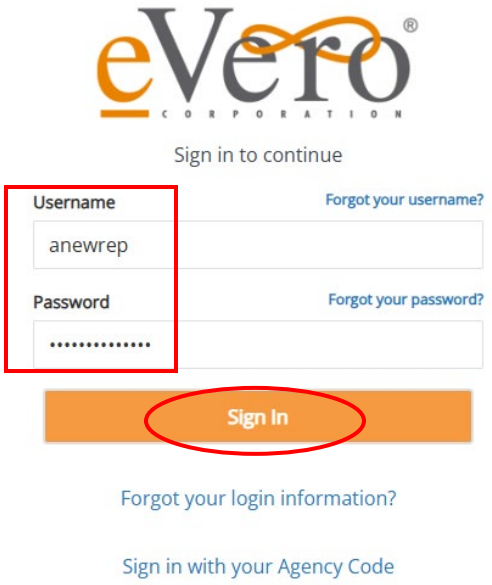


4. User will receive confirmation registration is successful
5. User will receive a do-not-reply-email with a link to everoPortal
    a. Select ‘Explore MyeveroPortal’ button to log in or
    b. Use link to website login

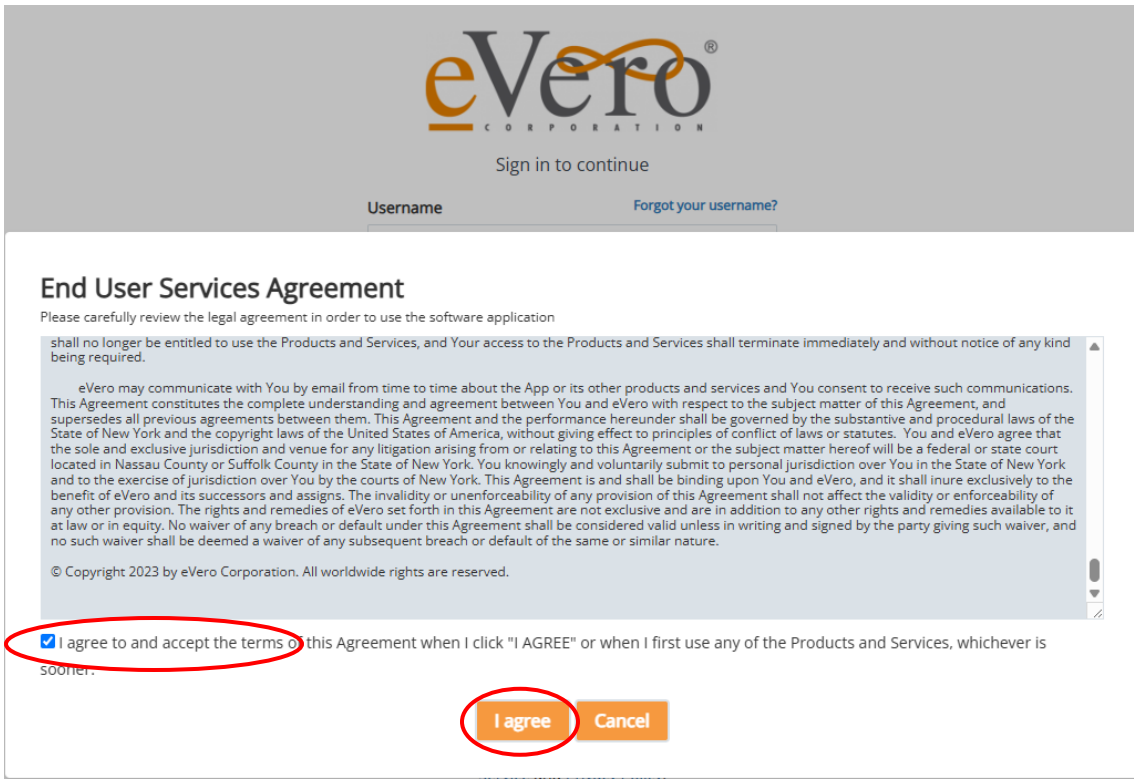




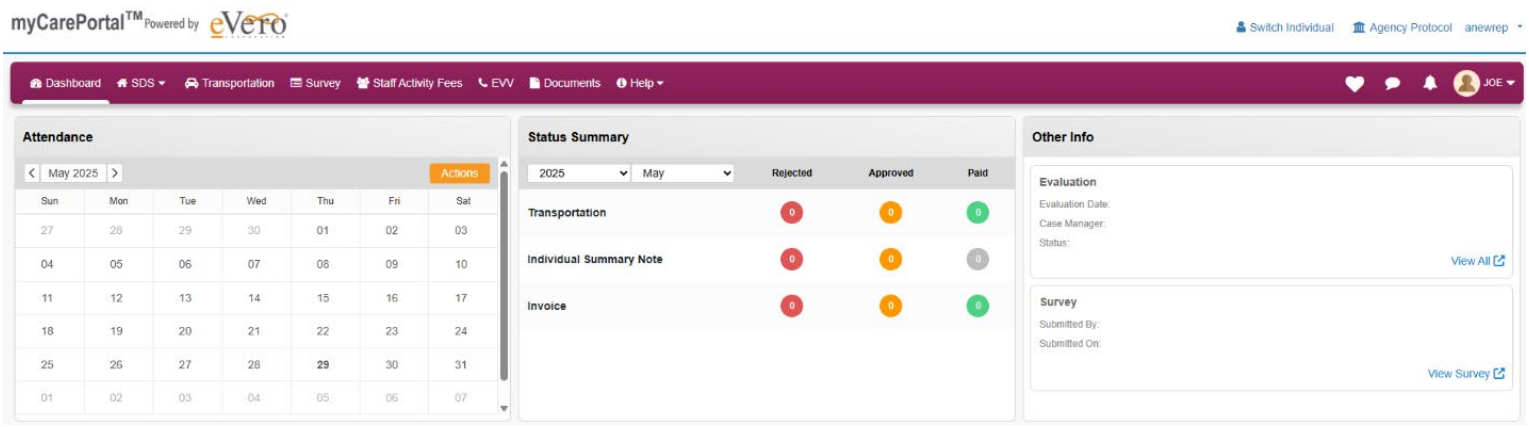
6. User will enter newly registered username and password in the evero login screen and select ‘Sign-in’



7. User will review end user services agreement and agree to accept terms

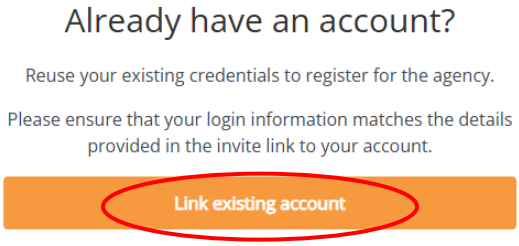


8. User will be brought to eVeroPortal website dashboard page

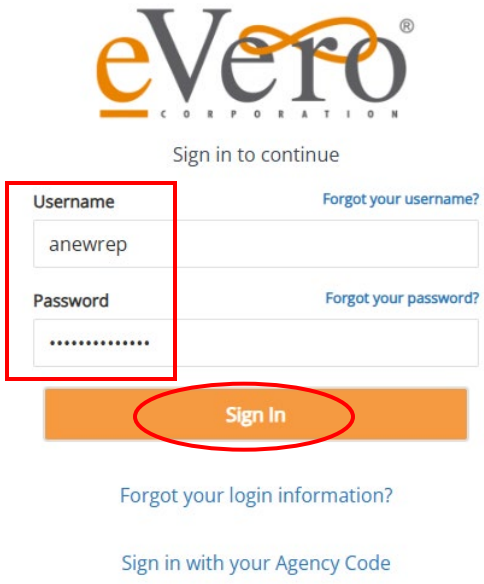


To Link Existing Account:

1. User will select 'Link Existing Account'

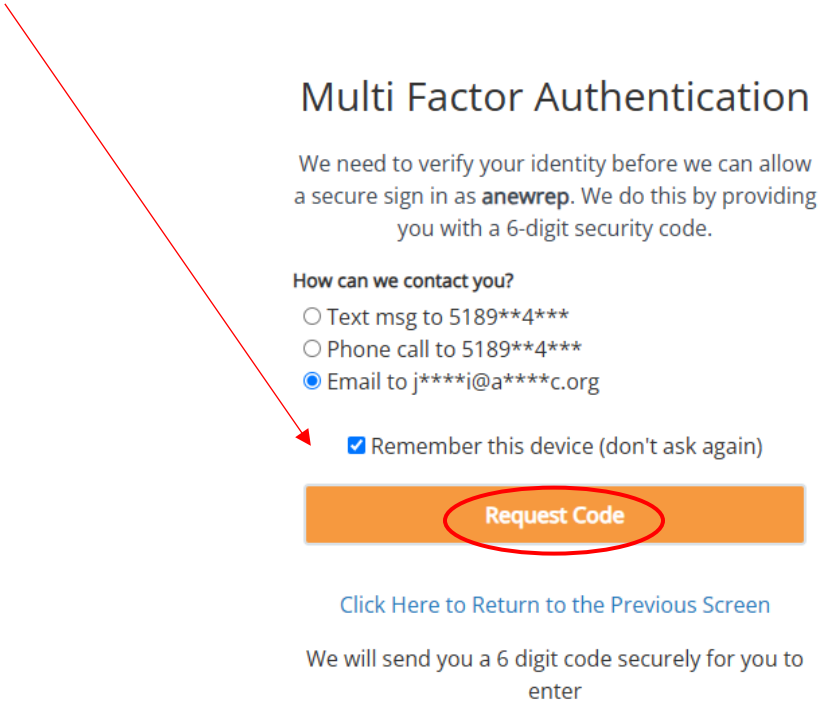


2. User will enter newly registered username and password in the evero login screen and select 'Sign-in'

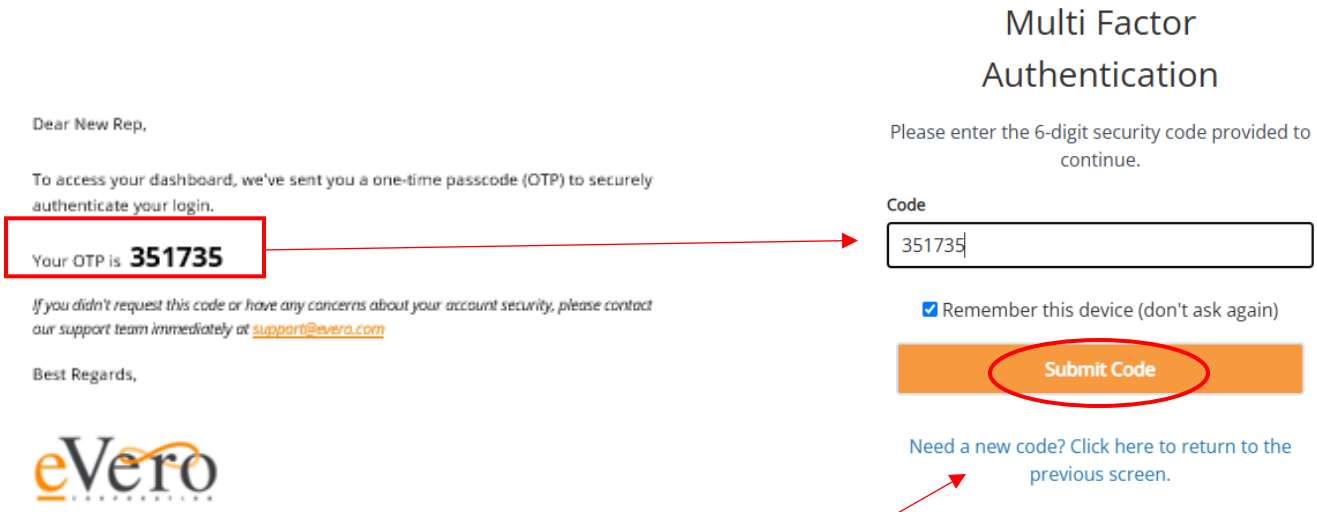


3. User will be promoted to choose an authentication option to verify identity
4. User will select ‘Request Code’

<u>Select remember this device to bypass MFA for the next login</u>

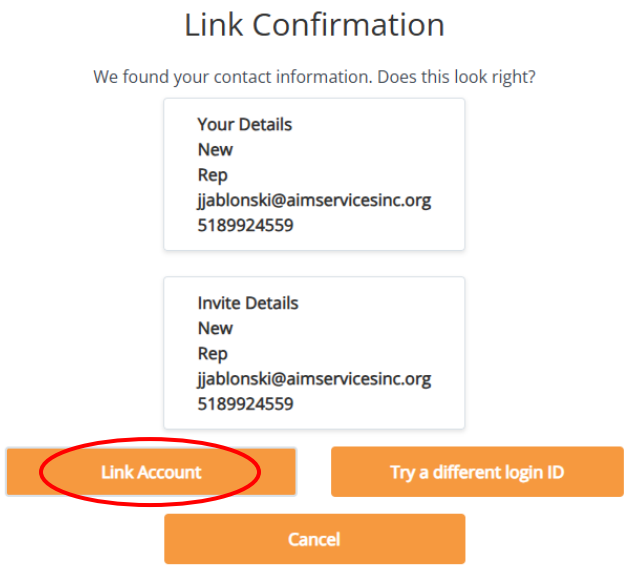


5. User will receive a communication including a one-time passcode for security authentication via selected authentication option
6. User will enter the 6-digit code received
7. User will select ‘Submit Code’

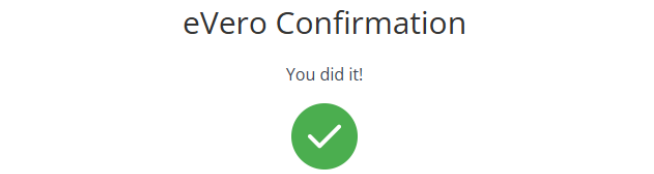


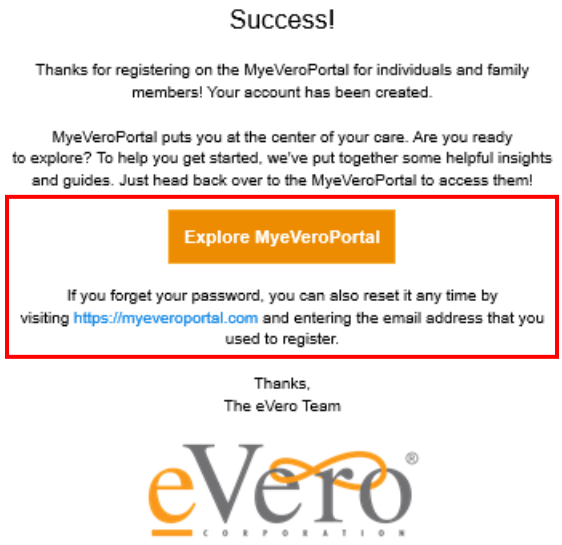
Please note: if code is not received select ‘Need another code? Click Here!’ hyperlink

8. User will confirm contact details and select ‘Link Account’



9. User will receive confirmation registration is successful
10. User will receive a do-not-reply-email with a link to everoPortal
    a. Select ‘Explore MyeveroPortal’ button to log in or
    b. Use link to website login





11. User will select individual to navigate to individual dashboard



12. User will be brought to eVeroPortal website dashboard page

<u>User can toggle between individuals by selecting 'Switch Individual' at top right corner of screen</u>

