

## Consolidated Reporting Login Instructions

- Click on the yellow "**Registration**" button.
- You will be prompted to enter your ID Number (SSN or TIN) and the Client Temp Password that was provided to you by your representative. Once you have entered that information click "**Submit**".
- The next screen contains a User Agreement that you will need to read and click the "Accept" button.
- The next screen asks you to select your own personal User Name and Password, and to enter in your personal information (Address, Phone Number, email, etc.)  
**Please Note:** Usernames must contain a minimum of 6 characters and cannot contain the following special characters: ` < > ` ` % ; ( ) & + \ # ? { } | ^ ~ [ ]. This also applies to answers to a user's security questions. A strong password must meet the following requirements:
  - Passwords must contain a minimum of 6 characters and a maximum of 20 characters
  - Passwords must contain at least one numeric and one alphabetic character
  - Passwords must differ from the user's logon ID
  - Special characters are allowed in Passwords, except for the following: ~|<>[]
  - Passwords cannot be the same as the user's previous 5 passwords.
- Once all personal information has been entered, click the "**Next**" button.
- A Registration Confirmation screen will appear and you will need to click the "**Go**" button to complete the registration process.
- Your Representative at Planning Matters will be notified that you have registered and your access will be approved by your Representative.
- Once your access has been approved by your Representative you will receive an automatically generated notification email authorizing you to access the system. You can then log-on to the system, at your convenience, with the User Name and Password that you chose during the registration process.