

# How to set up your DFS ID?

## What is the DFS ID?

The DFS ID is the secure, official login system the New York State Department of Financial Services (DFS) now uses for regulated businesses to access most DFS online applications (like DFS Connect and NY LINX) with one set of credentials instead of many. It uses single sign-on (SSO) and multi-factor authentication (MFA) to keep your company's data safe. Access is by invitation only — DFS or your company's Entity Administrator must invite you before you can create and use your DFS ID. Having a DFS ID in 2026 is essential for filing reports, managing compliance, and interacting with DFS online.

## Step 1

Open up your email and look for an email from DFS with the subject "[Action Required] Welcome to DFS ID!"

## Step 2

Click on the hyperlink on step 1 that says "Account Set-Up Link" to open up the DFS ID setup link.

[Action Required] Welcome to DFS ID!



New York State Department of Financial Services <NYDFS@public.govdelivery.com>  
To [redacted]



If there are problems with how this message is displayed, click here to view it in a web browser.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

DFS ID is now available for entities and individual licensees to access the Department of Financial Services' online systems, including DFS Portal, DFS Connect, and NY LINX. Please read this email carefully as it contains important information.

**You were selected as a DFS ID administrator to ensure you can continue to access DFS applications as an individual licensee.**

You should complete these actions in a timely manner to ensure **you** can access these systems to continue to do business with the Department.

### Next Steps:

1. Complete your DFS ID account set-up by clicking this link: [Account Set-Up Link](#)
2. Follow the instructions as you set up your account to verify your email and create your profile and password.
3. Log in and set up multi-factor authentication using an authenticator application (such as Google Authenticator or Microsoft Authenticator). If you do not have an authenticator app, you will need to download one to your mobile device before completing this step.
4. If applicable, invite other users at your company to DFS ID so they can access DFS systems. Instructions on how to do so can be found in the DFS

## Step 3

Once the page loads, write your email address on the box and click continue.

The screenshot shows the 'SET UP DFS ID ACCOUNT' page at 'STEP 1 OF 4'. On the left, a progress indicator shows 'Email Verification' as 'In progress' with a radio button, while 'Passcode Verification', 'Profile Information', and 'Password' are 'Not started'. The main content area is titled 'Email Verification' and contains the instruction: 'Enter the email address associated with your account below. We will send a passcode to that email address. Once you receive the passcode, follow the instructions in the email to set up your password.' Below this is a text input field for 'Email Address (required)' with a small eye icon for visibility. At the bottom right are 'Cancel' and 'Continue' buttons.

## Step 4

Check your email where you should a unique passcode from DFS and write it on the box provided.

The screenshot shows 'STEP 2 OF 4'. The progress indicator shows 'Email Verification' as 'Completed' with a checkmark, and 'Passcode Verification' as 'In progress'. A blue link 'Return to previous page' is at the top left. The main content area is titled 'Passcode Verification' and contains the instruction: 'Check your email for a verification passcode and enter the passcode below. If you haven't received the verification email, check your spam or junk folder. You can also request a new passcode by clicking the Resend Passcode link below.' Below this is a text input field for 'Passcode (required)'. A link 'Resend Passcode' is provided for users who haven't received a passcode. At the bottom right are 'Cancel' and 'Continue' buttons.

## Step 5

Once you verified your email, you can fill in your name and phone number on the boxes and press "continue"

1. Your First Name
2. Your Last Name
3. Any phone number (cell or office)
4. You can leave blank if you don't use an extension.

The screenshot shows 'STEP 3 OF 4'. The progress indicator shows 'Email Verification' and 'Passcode Verification' as 'Completed' with checkmarks, and 'Profile Information' as 'In progress'. The main content area is titled 'Profile Information' and contains the instruction: 'Verify your first and last name, and provide your phone number to finish setting up your profile. Your privacy is important to us, and your personal details will only be used for account-related purposes.' Below this are four input fields: 'First Name (required)' (1), 'Last Name (required)' (2), 'Phone Number (required)' (3), and 'Extension (optional)' (4). At the bottom right are 'Cancel' and 'Continue' buttons.

## Step 6

Create a unique password for your DFS ID account.

Note: This is the new password you will use for all DFS related activities, so we recommend saving it to your password manager.

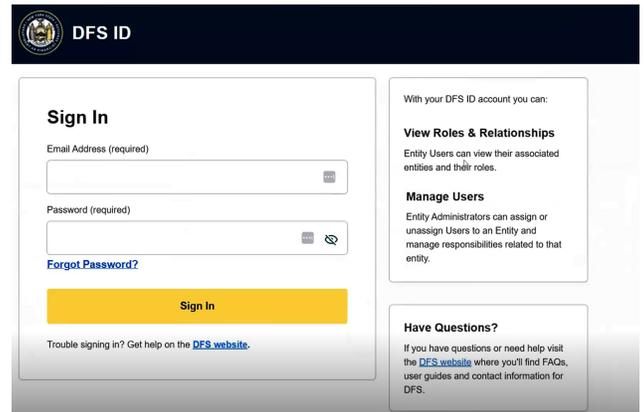
The screenshot shows 'STEP 4 OF 4'. The progress indicator shows 'Email Verification', 'Passcode Verification', and 'Profile Information' as 'Completed' with checkmarks, and 'Password' as 'In progress'. The main content area is titled 'Password' and contains the instruction: 'Enter your new password below. Make sure your password meets the required criteria. After confirming your new password, click "Continue" to proceed.' Below this is a 'Note' box with two bullet points: 'Your password must be a minimum of fourteen (14) characters.' and 'Your password is case sensitive.' Below the note are two text input fields: 'New Password (required)' and 'Confirm New Password (required)'. At the bottom right are 'Cancel' and 'Continue' buttons.

## Step 7

Once you set up your password, and the image below appears, Click on "Continue to sign in"

## Step 8

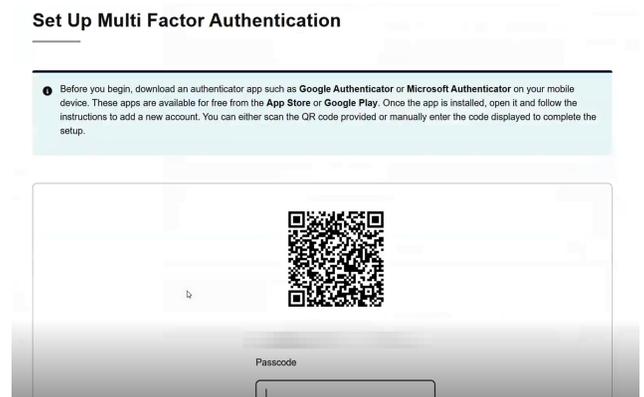
Once you are redirected to the sign in site, use the credentials you just created to sign into the DFS ID portal.



The screenshot shows the DFS ID Sign In page. At the top left is the DFS ID logo. The main content area is titled "Sign In" and contains two input fields: "Email Address (required)" and "Password (required)". Below the password field is a "Forgot Password?" link and a yellow "Sign In" button. To the right of the sign-in form are three informational boxes: "View Roles & Relationships" (Entity Users can view their associated entities and their roles), "Manage Users" (Entity Administrators can assign or unassign Users to an Entity and manage responsibilities related to that entity), and "Have Questions?" (If you have questions or need help visit the DFS website where you'll find FAQs, user guides and contact information for DFS).

## Step 9

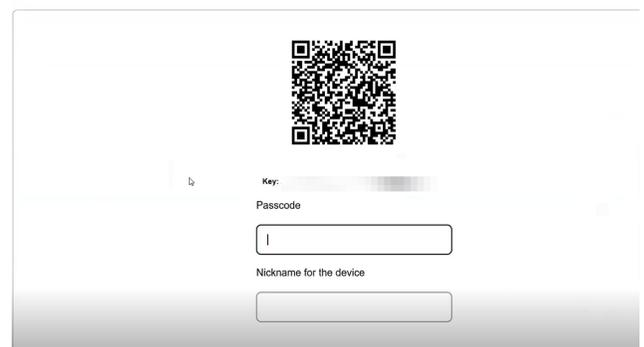
Once you sign in, you should get the image below, asking to set up Multi Factor Authentication. With your phone, use your microsoft authenticator to scan the QR code that appears on the screen.



The screenshot shows the "Set Up Multi Factor Authentication" page. It features a light blue instruction box at the top: "Before you begin, download an authenticator app such as Google Authenticator or Microsoft Authenticator on your mobile device. These apps are available for free from the App Store or Google Play. Once the app is installed, open it and follow the instructions to add a new account. You can either scan the QR code provided or manually enter the code displayed to complete the setup." Below this is a large QR code for scanning. At the bottom, there is a "Passcode" input field.

## Step 10

A unique six digit code should appear on your authenticator. Write it on the square that says "passcode" and under "nickname for this device" you can write cellphone.



The screenshot shows the Multi Factor Authentication setup page. It features a large QR code at the top. Below it are three input fields: "Key:" (with a blurred value), "Passcode" (with a six-digit code), and "Nickname for the device" (with the text "cellphone" entered).

## Step 11

Go back to home page.



### Your Multi Factor Authentication (MFA) has been successfully set-up.

You can now use your authenticator app to securely access your account. For future logins, you will be prompted to enter a time-based, one-time (TOTP) password from your app to complete the sign-in process. This added layer of security helps protect your information and prevent unauthorized access.

[Go to Homepage](#)

## Step 12

You will get a consent notice. Click agree on the bottom right corner.

### DFS Authorized Use Warning and Consent Notice

You are accessing a New York State Department of Financial Services ("DFS") application, and your activities on this system are monitored and recorded. This system is for authorized use only. Unauthorized access to or use of this system is prohibited and may result in disciplinary action, civil and criminal penalties, and/or other sanctions.

By logging in, you agree to comply with all applicable laws, regulations, and policies governing the use of this system, including but not limited to DFS regulations and your own organization's internal policies. You also indicate your awareness of and consent to these terms and conditions of use.

If you do not agree to these terms, please exit this system immediately.

[Agree](#)

## Step 13

You will be directed to your DFS ID Dashboard. Congratulations! Your account has been successfully set up!

DFS ID

Welcome to DFS ID,

