



**ORC ECA
Subscriber Instructions
for Individual
Identity and Encryption
Certificates**



Getting Prepared

Print these instructions for easy reference. (Note: this is a good test to see that you are able to print from your machine. You will need to be able to print the request forms after the on-line registration is submitted.)

What do I need to have on hand in order to complete the certificate process?

- When you apply for your certificates, you must make the request from the **same computer** that you will be using to retrieve the certificate once it is issued.
 - You will need to have a **FIPS 140-1/2 Level 1** cryptographic compliant web browser (exp: Netscape Navigator and Internet Explorer)
- Provide **two forms of photo Identification**. One of which must be a valid, current, official government ID such as a passport, driver's license, or government issued photo identity card or badge. The second photo ID can be an official company, or institutional, issued photo identity card or badge (ORC does not accept photo IDs from Retail Businesses, such as Costco, Sam's Club, etc.). For non-US citizens, photo ID credentials must include passport.
- Provide **Proof of Organizational Affiliation**.
 - If you are using a **company issued ID**, as one of your two forms of Identification, then this will also work as your Proof of Organizational Affiliation.
 - If you are not submitting a copy of a company issued photo ID, then you will need to **submit a letter on company letterhead**, signed by a Duly Authorized Company Representative, stating that you are an employee of that organization. (A sample letter is provided at <http://eca.orc.com/instructions.html>).





Getting Prepared (con't)

What do I need to have on hand in order to complete the certificate process? (continued)

- Provide **Proof of Citizenship**. All Certificates issued by the ORC ECA must assert the citizenship of the Subscriber. Non-US citizens must submit a passport from their country of citizenship. Acceptable documents for Proof of Citizenship for US citizens are limited to:
 - U.S. Passport
 - Certified birth certificate issued by the city, county, or state of birth, in accordance with applicable local law
 - Naturalization Certificate
 - Certificate of Citizenship
 - FS-240 – Consular Report
 - DS-1350 – Certification of Report of Birth
- Determine whether you require a **1,2,or 3 year** expiration period on your certificates.
- Determine the **Form of Payment** (Purchase Order (PO), Check, Credit Card (MC, VISA, AMEX)).
 - Check the website <http://eca.orc.com> for certificate price information. If your company has a pricing agreement with ORC, make sure to include the appropriate price and funding document on the printed request forms.
 - If paying by **credit card**, provide the information on the printed request forms. If paying by **PO**, you must have the PO number before you can continue. Once the PO is placed with ORC, continue with the registration process. Purchase Orders are submitted to:

Operational Research Consultants, Inc.
11250 Waples Mill Road
South Tower, Suite 210
Fairfax, VA 22030
Attn: Denise Finnance
703-246-8530





Getting Started

- Log into the computer that you will use to electronically **request** and **retrieve** your digital certificates. Remember, you must use a **FIPS 140-1/2 Level 1** cryptographic compliant web browser.
- Please go to the ORC ECA website at <http://eca.orc.com> to make your request.
- To begin the certificate process, please select either the **“Get Certificate” Green Arrow** on the home page, or the **“Order your Certificate”** button on the left menu bar.
 - Citizens of the US, UK, Canada, Australia, and New Zealand should select either the top **“Get Certificate” Green Arrow** or **“Order your Certificate” ORC ECA 2**
 - Citizens of other countries should select either the lower **“Get Certificate” Green Arrow** or **“Order your Certificate” ORC ECA Foreign National**
- Read the information describing the **“Online Application”** process and click **Green Next Arrow**
- Read the information describing **“Identity Verification”** and click **Green Next Arrow**
- Read the information describing the **“Secure Online Certificate Delivery”** process and click **Green Next Arrow**





Trust the CAs

Trust the Certificate Authorities

- When you come to the “Trust Certificate Authority” page, please be sure to select **“Trust the CAs”** Button.
- On the “Begin the Registration Process” window, **read and print the instructions**.
- Select the Green **“Click Here”** button next to **Step 1. Trust the ECA Root Certificate Authority**.
 - If a “Security Alert” pops up and asks you if you want to continue, click **Yes**
 - In the “File Download” window, click **Open**
 - Under the “General” tab, in the “Certificate Information” window, click **Install Certificate**
 - In the Certificate Import Wizard window, click **Next**
 - In the Certificate Store window, click **Next**
 - Click **Finish**
 - If a “File Download” window pops up, click **Save**.
 - Save the eca_root file to your desktop
 - **Open** the file from your desktop.
 - Under the “General” tab, in the “Certificate Information” window, click **Install Certificate**
 - In the Certificate Import Wizard window, click **Next**
 - In the Certificate Store window, click **Next**
 - Click **Finish**
 - If a Security Warning window pops up, click **Yes**
 - In the “The Import was successful” pop-up, click **OK**
 - In the “Certificate Information” window, click **OK**
- Select the Green **“Click Here”** button next to **Step 2. Trust the ORC ECA Certificate Authority and Step 3 ORC ECA 2 Certificate Authority**. Follow the same directions from Step 1 – Trusting the ECA Root Certificate Authority.
- Once you have trusted the CAs, select the Green **“Click Here”** button next to Step 3 to Obtain your Certificate.





Identity Certificate Request

- **Read the Notes posted at the top of the “Select a Certificate” page.**
 - **Note 1:** You must first electronically submit your request for an Identity Certificate, prior to requesting an Encryption or Mobile Code Signing Certificate.

Apply for your Identity Certificate

- In the “Select a Certificate” window, click **Identity Certificate**
- On the “Subscriber Obligations” window, you will be required to read the Subscriber Obligations and agree to comply with these obligations before continuing on with the certificate request process. Once you have read and agreed with the Subscriber Obligations, click **I Agree**.
- In the “Medium Assurance Identity Request” screen, use the drop-down box next to “Identity Certificate Enrollment” to **select the number of years** you would like your certificate to be valid for, this is also known as the Certificate Validity Period.
 - Note: Prices on this page are our List prices. If your company has a pricing agreement with ORC for a different rate, then please disregard the prices next to the years in the drop down list.
- Fill in all other fields on this page.
 - Enter your **full, legal name**. Your name **MUST** match your government-issued photo identification (If your driver’s license says “James L. Smith” and your company ID badge says “Jim Smith”, enter “James L. Smith”.)
 - Enter your Company Name. (Enter the name of the Company that pays you, not the facility/customer that you work at/for.) For email address, enter your company address (<you@yourcompany.com>).
 - Select your country of citizenship for the Country drop down menu.
- If you are using Internet Explorer, **before you click Submit**, please read the instructions in blue on the following page.





Identity Certificate Request

- **If you are using Internet Explorer:**

- You will see a pop-up window Titled “Potential Scripting Violation” that asks “Do you want to request a certificate now?” **Click Yes**
- In the “Creating a new RSA Exchange Key”, **click Set Security Level**
- Set to “**High**”. Click **Next**
- On the next screen:
 - Enter your Name in the "Password for" field
 - Note: If you are using Windows XP, the “Password for” field is filled out automatically.
 - Then enter your password in both the "Password" and "Confirm" fields.
 - **Note:** Selecting one password to use each time you are asked for a password will ensure the smoothest process possible. ORC suggests your passwords be compliant with FIPS 112. All passwords are case sensitive and it is suggested that they be at least 8 characters long, and include letters, numbers and characters. If you forget your password, there is no way to recover it and **you will need to purchase a new certificate.**
- Then click **Finish**.
- Then click **Ok**.

- **General Instructions Continued:**

- You should now see your “Request for ORC ECA Encryption Certificate” form. You must **PRINT** out the entire form (should be 3 pages). (You will see a “Finish Line” at the end of the form.)
 - **Do not exit this window until you have verified that the form has printed properly. If you cannot print the form, you cannot continue and you will have to start the process over. (Please call the help desk if this occurs before closing down the screens (1-800-816-5548 or 703-246-8536))**
- After you have obtained a successful print-out, you may click **Continue** at the bottom of the forms.
- If you are not requesting another certificate, you may now exit the ORC website, or browse for further information.





Encryption Certificate Request

- **Read the Notes posted at the top of the “Select a Certificate” page.**
 - **Note 1:** You must first electronically submit your request for an Identity Certificate, prior to requesting an Encryption or Mobile Code Signing Certificate.

Apply for your Encryption Certificate

- In the “Select a Certificate” window, click **Encryption Certificate**
- On the “Subscriber Obligations” window, you will be required to read the Subscriber Obligations and agree to comply with these obligations before continuing on with the certificate request process. Once you have read and agreed with the Subscriber Obligations, click **I Agree**.
- In the “Medium Assurance Encryption Request” screen, use the drop-down box next to “Encryption Certificate Enrollment” to **select the number of years** you would like your certificate to be valid for, this is also known as the Certificate Validity Period.
 - Note: Prices on this page are our List prices. If your company has a pricing agreement with ORC for a different rate, then please disregard the prices next to the years in the drop down list.
- Fill in all other fields on this page.
 - Enter your **full, legal name**. Your name **MUST** match your government-issued photo identification (If your driver’s license says “James L. Smith” and your company ID badge says “Jim Smith”, enter “James L. Smith”.)
 - Enter your Company Name. (Enter the name of the Company that pays you, not the facility/customer that you work at/for.) For email address, enter your company address (<you@yourcompany.com>).
 - Select your country of citizenship for the Country drop down menu.
- If you are using Internet Explorer, **before you click Submit**, please read the instructions in blue on the following page.





Encryption Certificate Request

- **If you are using Internet Explore:**

- You will see a pop-up window Titled “Potential Scripting Violation” that asks “Do you want to request a certificate now?” **Click Yes**
- In the “Creating a new RSA Exchange Key”, **click Set Security Level**
- Set to “**High**”. **Click Next**
- On the next screen:
 - Enter your Name in the "Password for" field
 - **Note:** If you are using Windows XP, the “Password for” field is filled out automatically.
 - Then enter your password in both the "Password" and "Confirm" fields.
 - **Note:** Selecting one password to use each time you are asked for a password will ensure the smoothest process possible. ORC suggests your passwords be compliant with FIPS 112. All passwords are case sensitive and it is suggested that they be at least 8 characters long, and include letters, numbers and characters. If you forget your password, there is no way to recover it and **you will need to purchase a new certificate.**
- Then click **Finish**.
- Then click **Ok**.

- **General Instructions Continued:**

- You should now see your “Request for ORC ECA Encryption Certificate” form. You must **PRINT** out the entire form (should be 3 pages). (You will see a “Finish Line” at the end of the form.)
 - **Do not exit this window until you have verified that the form has printed properly. If you cannot print the form, you cannot continue and you will have to start the process over. (Please call the help desk if this occurs before closing down the screens (1-800-816-5548 or 703-246-8536)**
- After you have obtained a successful print-out, you may click **Continue** at the bottom of the forms.
- If you are not requesting another certificate, you may now exit the ORC website, or browse for further information.





Printed Certificate Request Forms

Once you have completed your on-line registration and printed your Certificate Request Forms, you will need to make sure that you properly complete the forms before taking them to a Notary Public, an ORC Registration Authority (RA), or a Local Registration Authority (LRA). (Do not sign the printed request forms until in the presence of a Notary, RA or LRA)

What you will need to fill out the Printed Request Form:

Provide **two forms of photo Identification.**

- One of which must be a valid, current, official government ID such as a passport, driver's license, or government issued photo identity card or badge. For non-US citizens, photo ID credentials must include passport.
- The second photo ID can be an official company, or institutional, issued photo identity card or badge. If you use your company issued photo badge as one of the forms of ID, then that will also fulfill the proof of company affiliation. (ORC does not accept photo IDs from Retail Businesses, such as Costco, Sam's Club, etc.).

Make copies of both the front and the back of the 2 photo ID's and include them when you submit your printed forms.

You must also **provide proof of organizational (company) affiliation.**

- If one of your photo IDs from the step above *clearly* indicates your employer, then that will fulfill this requirement.
- Otherwise, you will need to submit a letter on company letterhead indicating your status as an employee and signed by a duly authorized company representative. A sample letter may be downloaded at <http://eca.orc.com/instructions.html> under General Instructions.





Printed Certificate Request Forms (con't)

What you will need to fill out the Printed Request Form (continued):

- Provide **Proof of Citizenship**. All Certificates issued by the ORC ECA must assert the citizenship of the Subscriber. Non-US citizens must submit a passport from their country of citizenship. Acceptable documents for Proof of Citizenship for US citizens are limited to:
 - U.S. Passport
 - Certified birth certificate issued by the city, county, or state of birth, in accordance with applicable local law
 - Naturalization Certificate
 - Certificate of Citizenship
 - FS-240 – Consular Report
 - DS-1350 – Certification of Report of Birth

- You may now sign page 2 of the form DO NOT SIGN page 4 of the Request forms yet.** Page 4 of the forms must be signed in the presence of a notary public, RA or LRA. Complete all the fields, *except signature*, on both the “Request for ORC ECA Identity Certificate” and the “Request for ORC ECA Encryption Certificate” form as follows:





Printed Certificate Request Forms (con't)

Filling out the Printed Request Form

1. *First Page:*

- Read the rest of the instructions and note the address where you will need to send your original documents and copies of 2 photo Ids and a copy of your proof of citizenship.

2. *Second Page:*

- Read the Subscriber Obligations.** These are the same obligations you saw in the electronic registration process. By signing these forms you are again agreeing to comply with these obligations.
- Verify Name:** Verify that your name is Correct.
- Requestor Signature and Date:** You may go ahead and sign and date this page. This shows that you have read and agree to the Subscriber Obligations.
- Organization:** Verify that your company's name is correct.
- "1) Photo ID Type":** Enter the first type of photo ID you are submitting (exp: Enter "<State> Drivers License", "US Passport", etc.).
- "1) Photo ID #":** Enter the ID number for the ID type you are submitting. (exp: For a drivers license, enter your drivers license number).
- "2) Photo ID Type":** Enter the type of photo ID you are submitting. (exp: Enter "<Company name> employee badge".) (*ORC does not accept photo IDs from Retail Businesses, such as Costco, Sam's Club, etc.*).
- "2) Photo ID #":** Enter the ID number for the ID type you are submitting. (exp: Enter your employee badge number.)





Printed Certificate Request Forms (con't)

3. *Third Page:*

- Requestor Name:** Verify that your name is correct.
- Requestor Email Address:** Verify that your email address is correct.
- Requestor Phone Number:** Verify that your phone number is correct.
- Determine the form of payment.** ORC accepts VISA, MasterCard, American Express, Purchase Orders or Checks (payable to ORC, Inc.)
 - Credit Card Purchases:**
 - Circle the card type you are using.
 - Complete the **Card Holder Name, Card Number, Exp. Date** and **Billing Address**
 - Purchase Orders (PO):**
 - Purchase Order Number:** enter Company PO number, or ORC Invoice number. Include your company name before the PO number.
 - Purchase Orders need to be in place with ORC before you complete the certificate process. Some POs have invoices against them that you will need to reference. See your company representative for this information.
 - Checks:**
 - In the "Purchase Order Number" block fill in reference that you are paying by check and submit the check along with your completed forms.





Printed Certificate Request Forms (con't)

4. *Fourth Page:*

- Requestor Name:** Verify that your name is correct.
- Requestor Signature and Date:** Sign these in front of a Notary Public, RA or LRA.
- Notary/RA/LRA Name, Notary/RA/LRA Signature, and Date** must be completed by a Notary Public, an ORC RA or an authorized LRA. The **Date of Commission** must be completed by the Notary, and the **box** to the left is for the Notary seal.
 - The Notary, RA and LRA are witnessing your signature. In addition, the RA and LRA are required to make sure that everything you have filled out is accurate and check to make sure that you are an employee of your company.
- Verify country code is correct.** **Notary/RA/LRA** will need to verify the country code is correct by viewing your proof of citizenship documentation and initialing the form where marked.





Identity Verification

- Please present the the following to a Notary Public for notarization, or to a Local Registration Authority (LRA) or an ORC Registration Authority (RA) for approval.
 - Unsigned Certificate Request Forms (4 pages each)
 - Your 2 original photo ID's. (ORC does not accept photo IDs from Retail Businesses, such as Costco, Sam's Club, etc.).
 - Proof of Citizenship
 - Completed and Signed Proof of Organizational Affiliation letter (if not using a company badge). A sample letter may be downloaded at <http://eca.orc.com/instructions.html> under General Instructions.
- **Notary Public** - After the **Notary** witnesses your signature, you will need to mail the following to an ORC RA:
 - The original signed and notarized Certificate Request Forms for each certificate you requested (4 pages each).
 - Copies (front and back) of your 2 photo ID's. (ORC does not accept photo IDs from Retail Businesses, such as Costco, Sam's Club, etc.).
 - Pphotocopy of you Proof of Citizenship
 - Completed and Signed Proof of Organizational Affiliation letter (if not using a company badge). A sample letter may be downloaded at <http://eca.orc.com/instructions.html> under General Instructions.

Operational Research Consultants, Inc. – ECA
11250 Waples Mill Rd
South Tower, Suite 210
Fairfax, VA 22030
Attention: ECA RA





Identity Verification (Con't)

- **ORC Registration Authority (RA)** - You may also present your Certificate Request Forms in person to an ORC RA. The RA will verify your identity and witness your signing of the forms. The RA will keep the original paperwork for processing and secure archiving. You may present to an ORC RA at the following locations:
 - ORC, 11250 Waples Mill Road, South Tower, Suite 210, Fairfax, VA 22030 (703) 246-8568
 - ORC, 1625 Prince Street, Suite 350 Alexandria, VA 22314 (703) 535-5312
 - We recommend you call and make an appointment before visiting, to ensure an RA is available when you arrive.
- **Local Registration Authority (LRA)** – Some companies use **LRAs** through arrangements with ORC. You will probably have been told if your company has one or more ORC authorized LRAs, if you want to verify that your company has trained LRAs, please contact the ORC Helpdesk at 1-800-816-5548 or 703-246-8536. If your company has an ECA LRA that approves your forms, then they will keep the original paperwork and send a signed email to the ECA RA with your pertinent data for approval and issuance by the ORC Issuing Authority (IA).





Certificate Issuance

- You will receive an email from the ORC ECA IA notifying you that your certificate has been issued and providing you with a URL where you will be able to pick-up your certificate.
 - **ORC suggests that you export an operational copy of your certificate to a disc or CD as a precaution against hard drive failures, or network changes. Please be sure that you are in compliance with the subscriber obligations when storing you certificates.**
- **IMPORTANT NOTE:** When you apply for your certificates, you must make the request from the same computer that you will be using to retrieve the certificate once it is Issued.





ORC User Help

- **Contact the Help Desk at 1-800-816-5548, 7:30 AM to 7:30 PM Eastern Standard Time or e-mail ecahelp@orc.com.**
- **Additional Instructions (such as exporting your certificate) are available at <http://eca.org>, under Instructions.**

