Access - New User Request

In order for Health and Human Services employees (HHS) and Non-HHS Awarding Agencies to manage grant payment requests, drawdowns, and disbursement reporting activities for their recipients, members of these agencies will need to request a PMS User ID. The PMS User ID establishes the security for the user. It is the security profile that determines and controls what menu options and subsequently the processes the user can perform and the access to in the Payment Management System.

PMS will require the user to provide their agency, their contact and supervisor information, and select the accesses required. After submitting their request their supervisor will need to verify the information and access requested. If they approve then the information is submitted to PSC. PSC will review the request and verify the provided information. Once they issue their approval a User ID will be issued to the requester.
Requesting Access

1. Access the PSC Home page at https://pms.psc.gov
2. Select the ‘Login’ button from the right hand side of the PMS menu bar.
3. On the PMS Login page, select ‘Request Access’.

4. Click on the ‘Create New User’ button. To return to the ‘Home’ page, click on the ‘x’ and select ‘HomePage’.

5. The ‘New User Access Request’ form is displayed.
6. Select the User Type ‘Awarding Agency’ from the dropdown box.
7. Your email address will need to be verified prior to receiving any access to the system. Type in your email address in the ‘E-Mail Address’ field and then confirm the email address provided by typing the email address again in the ‘Confirm E-Mail Address’ field.

8. Click ‘Request Email Verification Code’ for an email to be sent to the email address.

9. Click ‘OK’, a success message will be displayed.

Success

A verification code was sent to Agencyuser1@gmail.com

An email message will be sent immediately to the email address provided containing the six digit verification code that is required to continue with the user access request. The verification code will be valid for 30 minutes.
**Note:** The user will need to request a new verification code if the verification code is not used within the 30 allotted minutes or if the user closes the 'New User Access Request' window.

**PMS User access request Verification Code**

PMSSupport@psc.gov

to me

Your PMS User Access request email verification code is:

398719

This verification code is valid for 30 minutes.

**Note:** To ensure that system emails are received, recipient IT organizations should white-list PMSSupport@psc.gov

10. Enter the six digit code in the ‘Email Verification Code’ field.
11. From the ‘Security Question’ dropdown box select one of the questions. This question and its answer will pertain to the user access request process only.

12. Provide the appropriate response to the question selected in the ‘Security Answer’ field.
**Note:** The security question selected and its answer will need to be provided when either checking on the status of a request or when required to modify a request.

![Security Question](image)

13. In the ‘Enter Captcha’ field, enter the displayed characters shown in the image beneath the field. If unable to read the displayed characters update the selection by clicking on the refresh icon next to the image.

![Captcha Field](image)

14. Select the ‘Submit’ button on the bottom of the page. If the user no longer wants to submit the information they may clear the form and provide new information by using the ‘Clear Form’ button or cancel the request by selecting ‘Cancel’.

![Submit and Clear Form](image)

**Warning Notice!**
This is a U.S. Government Computer system, which may be accessed and used only for authorized Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil and/or administrative action.

All information on this computer system may be intercepted, recorded, read, copied and disclosed by and to authorized personnel for official purposes, including criminal investigations. Such information includes sensitive data encrypted to comply with confidentiality and privacy requirements. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms.

FOR MORE INFORMATION OR ASSISTANCE PLEASE CONTACT US AT 1-877-614-5593 OR PMSSUPPORT@PSC.GOV

15. The PMS Access Request form will be displayed, requesters will need to provide:
   a. Their Agency and the departments and offices they need access for.
   b. User contact information comprising of their work address and telephone number.
   c. Select the type of access that they are requesting.
   d. Their supervisors information including their name, title, email, and phone number.
e. Any special instructions or additional requests.
16. Users may request access to one agency and to multiple bureau / organizational units within their agency. Click the ‘Add’ button for each bureau / organizational unit that you need access to.

17. The Department / Bureau / Organization Unit Pop-up Box will be displayed, users will need to select their:
   a. Department
   b. Bureau / Organizational Unit
   c. 3-digit Grantor Code

18. Click in the ‘Choose Department’ box for the Department drop down box to appear. Select the name of the federal department where you are employed.
19. Click in the ‘Choose OPDIV/Bureau/Organizational Unit’ box for the drop down box to appear containing the Operational Divisions/Bureaus/Offices associated with the federal agency selected.
20. A list of the 3 digit agency codes that have been assigned by PMS to uniquely identify the organizational units associated with the selected Grantor/Division will be displayed.
   a. Click checkboxes individually to pick individual organizational units that you are responsible for.
   b. Click ‘Select All’ to check all organizational units associated with the Division/Bureau.
   c. Click ‘Clear All’ to uncheck all boxes. At least one organizational unit must be selected.
21. Click the 'Save' button after selecting all applicable organizations. Click 'Clear' to clear all three organization levels selected. Click 'Cancel' to close the pop-up.
22. To remove Department / Bureau / Organization units added in error, click on the row in the grid to highlight the organization. Click on the ‘Remove’ button.

23. Click ‘OK’ to confirm the deletion.
24. The initial email provided in the request will be used as the Recipients email address and is not editable during the registration process. Recipients will be required to provide their full contact information including:
   a. First Name
   b. Middle Initial (optional)
   c. Last Name
   d. Job Title
   e. Full Address, including Country
   f. Phone number including Country code
   g. Telephone number type
25. Required fields are marked with a red asterisk. Error messages will be displayed when attempting to submit the form with missing required information.
26. Select the country from the drop down listed provided.

   *City: 

   *Country: Select Country

   *Zip Code:

27. When 'United States' is selected as the country, the State field will appear and the requester will be required to select the applicable state or US territory from the drop down box.

   *City: 

   *Country: UNITED STATES (+1)

   *State: Select State

   *Zip Code:
28. Provide a contact phone number. The country code for the phone number will automatically be filled in depending on the country selected in the address field. To override the country code select the checkbox ‘Do you want to override the Country Code?’ and provide the appropriate country code.

29. Select from the ‘Telephone Type’ drop down box the phone type of the number provided.
   a. Cell
   b. Home
   c. Office

   ![Image of phone number input fields]

30. Users will need to select the type of access that they request. The following accesses are available to choose from.

<table>
<thead>
<tr>
<th>HHS or Non-HHS Agency</th>
<th>Access Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HHS &amp; Non-HHS</td>
<td>Awarding Agency Inquiry</td>
<td>Default, all users automatically receive this access. Provides user with access to view on-line inquires.</td>
</tr>
<tr>
<td>HHS &amp; Non-HHS</td>
<td>Account Maintenance</td>
<td>Allow users to update their contact information, change password information, and request deactivations.</td>
</tr>
<tr>
<td>HHS &amp; Non-HHS</td>
<td>Registration</td>
<td></td>
</tr>
<tr>
<td>HHS &amp; Non-HHS</td>
<td>Access to Electronic Reports and Files</td>
<td>Provides access to view Department-wide financial reports generated by PMS.</td>
</tr>
<tr>
<td>HHS</td>
<td>HHS Subaccounts</td>
<td>Provides access to functionality which allows agency users to enter Subaccount Patterns in PMS via the upload of a batch file.</td>
</tr>
<tr>
<td>Non-HHS</td>
<td>On-Line Authorization</td>
<td>First level of the on-line authorization process. Allows authorization transactions, including TC050 and TC 059, to be entered in the PMS using the Fill-in-blank screen. Input pending approval. Note: PMS allows users to be granted both On-Line Authorization and Approve On-Line Authorizations however internal controls prevent the user from performing both actions on the same transaction.</td>
</tr>
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<td>HHS or Non-HHS Agency</td>
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<td>-----------------------</td>
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<tr>
<td>Non-HHS</td>
<td>Approve Authorizations: Approve On-Line Authorization</td>
<td>Second level of the on-line authorization process before the transaction can be updated in the PMS. Allows for review and approval/release to posting of an authorization transaction, including TC050 and TC059, input through On-Line Authorization.</td>
</tr>
<tr>
<td>Non-HHS</td>
<td>Approve Authorizations: Process 059 Transactions Only</td>
<td>Provides access to process only authorizations to Transaction Code 059, which must then be approved by a different individual with On-Line Authorization Approval. TC 059 is used to trigger the closing process in PMS. When selected user cannot TC 059 using the fill-in-blank screen or from the Correct Exceptions table.</td>
</tr>
<tr>
<td>Non-HHS</td>
<td>Payments: Approve</td>
<td>The first level of the payment review process. Select if applicable to your agency and the user is responsible to review all payment requests by your grantee. Cannot be combined with confirm payments.</td>
</tr>
<tr>
<td>Non-HHS</td>
<td>Payments: Confirm</td>
<td>The second level of the payment review process. Select if applicable to your agency and the user is responsible to review all payment requests by your grantee. Cannot be combined with approve payments.</td>
</tr>
<tr>
<td>Non-HHS</td>
<td>Process On-Line Authorization Batch</td>
<td>Provides access to functionality which allows agency users to enter Authorization transactions in PMS via the upload of a batch file.</td>
</tr>
<tr>
<td>Non-HHS</td>
<td>Process On-Line Subaccount Batch</td>
<td>Provides access to functionality which allows agency users to enter Subaccount Patterns in PMS via the upload of a batch file.</td>
</tr>
<tr>
<td>Non-HHS</td>
<td>Process On-Line Authorization and End Date Extension</td>
<td>Provides access to functionality which allows agency users to extend the liquidation period of a grant without changing the award end date in PMS.</td>
</tr>
<tr>
<td>HHS &amp; Non-HHS</td>
<td>Federal Financial Report (FFR): Federal Cash Transaction Report (FCTR) - View</td>
<td>Default, all users receive this access. Provides ability to view the FCTR.</td>
</tr>
<tr>
<td>HHS &amp; Non-HHS</td>
<td>Federal Financial Report (FFR) - View</td>
<td>Provides access to only view the submission of grantee’s FFR’s.</td>
</tr>
<tr>
<td>HHS &amp; Non-HHS</td>
<td>Federal Financial Report (FFR) - Approver</td>
<td>Provides access for viewing and accepting/rejecting grantee’s FFR’s.</td>
</tr>
</tbody>
</table>
Only a subset of the access available will be displayed to the user. The subset displayed will vary based on the Agency selected.

**Note:** Always select your agencies prior to selecting the access levels. The checkboxes available vary depending on the Agency selected.

HHS Access Levels consists of:

a. Awarding Agency Inquiry, automatically checked for all users  
b. Registration  
c. Access to electronic reports and files  
d. HHS subaccounts  
e. Process On-Line Authorization End Date Extensions  
g. View the Federal Financial Report (FFR)  
h. Approve the Federal Financial Report (FFR)

Non-HHS Access Levels consists of:

i. Awarding Agency Inquiry, automatically checked for all users  
j. Account Maintenance, automatically checked for all users
k. Registration
l. Access to electronic reports and files
m. On-line Authorization
n. Approve Authorizations: Allows for either Approve On-line Authorization or Process 059 Transactions Only
o. Payments: Either Approve or Confirm user cannot select both
q. Process On-Line Subaccount Batch
r. Process On-Line Authorization End Date Extension
t. View the Federal Financial Report (FFR)
u. Approve the Federal Financial Report (FFR)

31. The users supervisor will be required to approve the request. The user should provide their supervisors:

a. First Name
b. Middle Initial (optional)
c. Last Name
d. Job Title
e. Telephone number include country code if applicable.
f. Email Address
**Note:** If you are the highest ranking person in your organization, then provide your own information for the Supervisor information.

When the email addresses of the requester and supervisor match, the checkbox with the highest ranking message will be displayed to the user to select and continue, otherwise an error message appears and can’t submit the request.

32. Provide additional information for PSC in the comments field
33. Prior to submitting the user will need to check the certification box indicating that all the information provided is true to the best of their knowledge. Providing willfully false information is a criminal offense and is punishable by law.

Note: Users that check the certify box and then return to amend any of their answers will be required to recertify their answers prior to being able to successfully submit their application.

34. Recipients may click the ‘Save’ button at any time to save and exit the request. A Request ID will be emailed to the email address provided. The Request ID and along with the security question and its answer initially selected will be required to retrieve the Request.
35. Click ‘Submit’ to send the request to the listed Supervisor for approval.
36. A ‘Success’ screen will be displayed containing the Request ID.

Additionally, an email will be sent to the user containing the ‘Request ID’. The recipient will need to use the ‘Request ID’ along with the security question they selected to check on the status of a request or make updates to saved or rejected requests. The provided User ID and the associated security question are valid only while the request is being processed. Once the request has been approved the user will be issued their permanent User ID and will select new security questions to be associated with their new ID.
A rejection email will be received if either the supervisor or PMS staff return the request.

Retrieving Existing Requests

Agency users may return to requests in order to complete, fix, or to check on their status.

To either return or check on the status of a submitted request:

1. The original requester may either:
   a. Access the PSC Home page at https://pms.psc.gov and select ‘Request Access’ under the login button
   b. Or for rejected requests, click on the link listed in the rejection email.

2. Select ‘Retrieve Existing Request’.
3. The user will be prompted to provide their:
   a. Request ID – The ID can be found in the email that was initially sent by the system to the user after submitting or saving the registration form.
   b. Security Question – The security question that the user initially selected during the requesting process.
   c. Security Answer – Provide the answer to the security question selected. Field is case sensitive.
   d. Captcha Field – Enter the characters that are displayed in the image provided. If unable to read the displayed characters click on the refresh icon next to the image to obtain a new character set.
Error messages will be displayed if the incorrect Security Question is selected and answered. If a user can no longer recall the question selected then they will need to create a new request.
4. Click ‘Submit’ after providing the correct information to display and update the initial request. If the initial request was rejected the rejection reason will be seen in the ‘Request Details’ section.
If the request has already been submitted and a review is in progress then the current status of the request will be displayed to the user.
Supervisor Review

After an awarding agency user requests access to PMS the supervisor designated in their request will need to review the submitted information and verify its accuracy. The supervisor email provided by the user will be used to send an email to the supervisor requesting that they review and approve the request.

The email will contain a link that will allow the supervisor to review the provided information.

**Note:** Supervisors are not required to have access to PMS in order to verify and approve the information provided.

1. Click on the link within the email received.
2. The Supervisor view of the Payment Management System Access Request will be displayed. The view will consist of three tabs.
   a. Request Details – will list the information that the user requesting the access provided.
   b. Supervisor Comments – a place for the supervisor to enter any comments. Comments will be required when rejecting the request.
   c. Status History – a list of previous comments and dates that apply to this request.
3. The Supervisor should review the information on the Request Details tab. The ‘Request Details’ tab is read-only for the supervisor.
4. 4) After verifying that the provided information is correct the supervisor will be required to certify that the information is true. Click on the box associated with the ‘I certify…’ statement.
5. Click the ‘Approve’ button. The request will then be sent to PSC for verification and approval.
6. If the information needs revision then the Supervisor should:
   a. Select the ‘Supervisor Comments’ tab and provide the required changes in the comments section.
   b. Certify the Information provided by clicking the checkbox associated with the ‘I Certify…’ statement.
   c. Click on the ‘Reject’ button on the ‘Request Details’ tab.

An email will be sent to the recipient indicating that the request has been rejected and the request will be available for the recipient to edit.

7. The Supervisor can view previous comments made either by them or by PMS staff by selecting the ‘Status History’ tab.

8. A success screen will be shown to the supervisor after they have approved the request.
Receiving your User ID

Once the supervisor has approved your request for access the request will be forwarded to PSC. PSC will verify the information provided and determine if PMS access should be granted. If it is determined that PMS access will be granted the recipient will receive an email from the system containing their User ID and a temporary password.

1. Use the link provided in the email to access the login screen.

   ![New PMS User Request Completed](https://example.com)

   * PMSSupport@psc.gov
   * Your requested access to the Payment Management System (PMS) has been completed. To access the PMS, please click on the following link and enter your PMS Username and temporary password. You will need to Self Certify, supply Security Questions and Change your Password upon initial entry into PMS.
   * https://pms.psc.gov
   * PMS Username: VBGTU884
   * Password: Owsaqep
   * If you require assistance, please contact the Help Desk at PMSSupport@psc.gov or 1.877.514.6533.

2. Use the User Name and the temporary password provided in the email
3. Read the ‘Government terms of use’ and click the ‘I agree’ checkbox.
4. Click ‘Login’.
5. An error message will be received if either the login or password is invalid.

Following successful first time login users will need to:

- Change their password
- Set up their security questions
- Certify that they are authorized to use the system.

New users will be shown the 'Manage User Information' page.

6. Users will need to provide the temporary assigned password and then provide a new password.
Passwords are expected to have the following characteristics.

- Passwords are case sensitive
- The password must be between 8 and 30 characters long
- The password may not contain any spaces
- The password must NOT contain commonly used words.
- The password must contain at least 1 uppercase letter.
- The password must contain at least 1 lowercase letter.
- The password must contain at least 1 number
- The password must contain at least 1 special character but exclude single quote, double quote, colon, or semicolon.
- You cannot reuse a password for 300 days and your last 6 passwords.
- The password may not contain significant portions of your PMS User ID, first or last name.

7. Click on the ‘Request Verification Code’ button. A six digit code will be sent to the email address on file immediately.
8. Provide the code received in the ‘Verification Code’ field.
9. Select your three (3) Security Questions and Answers.
   - From each of the Drop downs select a security question.
   - Provide the appropriate answer in the text box below.
10. Read the Certification statement and then certify by clicking in the checkbox provided.
11. Click the ‘Change’ button.
After clicking the ‘Change’ button users will be immediately logged out and should log into PMS using their newly updated password.
All users are required to self-certify annually. The ‘PMS Annual Self Certification’ page will be automatically displayed following the first successful login to the system. Read the certification information and then select the ‘I Agree’ button.

The user will be brought to the PMS Home Page.