Requesting Access

1. Access the PSC Home page at [https://pms.psc.gov](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 Home Page.
5. The 'New User Access Request' form is displayed.
6. Select the User Type ‘Grantee/Recipient’ 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 percygrantester@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 15 minutes.

Note: The user will need to request a new verification code if the verification code is not used within the 15 allotted minutes or if the user closes the ‘New User Access Request’ window.

10. Enter the six digit code in the ‘Email Verification Code’ field.
11. From the ‘Security Question’ dropdown box select one of the question. 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.

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.

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 to provide different information by using the ‘Clear Form’ button or cancel the request by selecting ‘Cancel’.

The PMS Access Request form will be displayed, requesters will need to provide:

- Their organization information including the organization name and either the organizations EIN, PIN, or PAN’s that the user needs access to.
- User contact information comprising of their work address and telephone number.
- Select the type of access that they are requesting.
- Their supervisors information including their name, title, email, and phone number.
- Optional comments may be provided.
15. Select the ‘Add’ button to provide the Organization/Institution information that you want access to. Use the ‘Add’ button for each organization that you need access to.

16. The Organization / Institution Pop-up Box will be displayed after selecting ‘Add’, provide,
   - The organization name.
   - Select from one of the available Organization ID Types:
     i. EIN – Consists of the organizations Tax Identification Number, and a PMS prefix and suffix. Users may select to provide only their Tax Identification Number if the PMS prefix and suffix information is unknown.
     ii. PIN – Payee Identification Number, issued by PMS. Selecting a PIN will provide the user with access to all PAN that are associated with the PIN.
     iii. PAN – Payee Account Number, issued by PMS.
Organization / Institution

Organization Name: [Blank]
Organization ID Type: EIN, PIN, PAN

Save, Clear, Cancel

Note: The EIN, PIN, and PAN’s must exist in PMS to be approved by PSC.

- Enter either the EIN, PIN, or PAN number depending on the Organization ID Type selected.

Organization / Institution

Organization Name: ABC Organization
Organization ID Type: EIN
Enter EIN: [Blank]
All Accounts: Yes, No

Save, Clear, Cancel

- When providing an EIN or PIN the user will need to select the ‘Yes’ option for ‘All Accounts’ to confirm that they would like access to all PAN’s associated with the EIN. If the answer to ‘All Accounts’ for the EIN is no then the user should provide the PIN instead. If the answer to ‘All Accounts’ to both the EIN and PIN is ‘No’ then the user should input the individual PAN numbers that they are requesting access to.
  - EIN are required to be 9-12 characters in length and must be valid EINs in PMS.
ii. PINs are required to be 4-5 characters in length. To add multiple PIN for an organization, save the PIN and then use the organization 'Add' button to add additional PINs.

- PANs are required to be 5 - 7 characters in length. Click the green plus sign (+) to add additional PANs for an organization.
Use the red minus sign (-) to delete any PANs added in error.
Select 'Save' to add the organization information to the request.

The organization information will be shown in the Organization/Institution Section.
17. To either ‘Remove’ or ‘Edit’ a organization, select the organization in the grid by clicking anywhere on the line and then select either ‘Remove’ or ‘Edit’.

![Organization grid with actions](image)

18. Within the ‘Contact Information’ section provide the following recipient contact information:

   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
19. Error messages will be displayed for missing required information.
20. Select the country from the drop down list provided.

*City: 

*Country: Select Country

*Zip Code:

21. When 'United States' is selected as the country, the 'State' field will appear and the requester will be required to select the applicable state from the drop down box.
22. 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.

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

24. Users will need to select the type of access that they need. The following levels of access are available in PMS.

<table>
<thead>
<tr>
<th>Access Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grantee Inquiry</td>
<td>Default.</td>
</tr>
<tr>
<td>Account Maintenance</td>
<td>Default. Allows for updating of user information such as contact information.</td>
</tr>
<tr>
<td>Read Only Access</td>
<td>This access is inquiry only. This access should only be chosen when not choosing other accesses or in conjunction with FFR View access.</td>
</tr>
<tr>
<td>Payment Request</td>
<td>Access to request funds. This access includes the ability view inquiries.</td>
</tr>
<tr>
<td>Add/Update Banking</td>
<td>Access to add and update banking information for a payee account for both domestic and international bank accounts.</td>
</tr>
<tr>
<td>Access Level</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Federal Cash Transaction Report (FCTR) - View</strong></td>
<td>Access to view the quarterly FCTR in which recipients report cumulative federal cash disbursements. This report is used by Payment Management Services to manage recipient accounts. This report is required for all G and P type accounts.</td>
</tr>
<tr>
<td><strong>Federal Cash Transaction Report (FCTR) - Preparer</strong></td>
<td>Access to prepare the quarterly FCTR in which recipients report cumulative federal cash disbursements. The ability to View the FCTR is automatically included when choosing this option.</td>
</tr>
<tr>
<td><strong>Federal Cash Transaction Report (FCTR) - Certifier</strong></td>
<td>Access to certify the quarterly FCTR in which recipients report cumulative federal cash disbursements. The ability to View the FCTR is automatically included when choosing this option.</td>
</tr>
<tr>
<td><strong>Federal Financial Report (FFR) - Preparer</strong></td>
<td>Access to prepare the expenditure report. The ability to view the FFR is automatically included when choosing this option.</td>
</tr>
<tr>
<td><strong>Federal Financial Report (FFR) - Certifier</strong></td>
<td>Access to certify the expenditure report. The ability to view the FFR is automatically included when choosing this option.</td>
</tr>
</tbody>
</table>

Check all access levels required.

25. A supervisor will be required to approve the request. Provide your supervisors:

   a. First Name
   b. Middle Initial (optional)
   c. Last Name
   d. Job Title
e. Telephone Number
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.

26. If the recipient wants to explain why they need access or provide additional information to help PSC verify their information they may provide this information in the comment field. Up to 1000 characters will be accepted.
27. 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.

28. 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 the security question initially selected and its answer will be required to retrieve the request.
29. Click ‘Submit’ to send the request to the listed Supervisor for approval.
30. 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 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.
You have initiated a request to access the Payment Management System (PMS). Your Request ID for this request is: Request ID=EST0001225. If you need to return to your request to either complete the request, make a correction or to check on the status, you will need to input this Request ID on the Retrieve Existing Request tab.

A rejection email will be received if either the supervisor or PMS returns the request for changes.

Retrieving Existing Requests

Recipients 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 user may either:
   a. Access the PSC Home page at https://pms.psc.gov and select ‘Request Access’ under the login button.
   b. For rejected requests, click on the link listed in the rejection email.

2. Select ‘Retrieve Existing Request’.
User Registration

Create a PMS New User Account
To create a new user in PMS you must fill out a New User Access Request form by completing all of the requested information, and submitting it.

Create New User

Retrieve an Existing PMS User Request
To retrieve an existing user request in PMS you must fill out a Retrieve Existing Access Request form by completing all of the requested information, and submitting it.

Retrieve Existing Request

Deactivate an Existing PMS User Account
To deactivate an existing PMS user account in PMS you must fill out a Deactivate User Access Request form by completing all of the requested information, and submitting it.

Deactivate User

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 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 a user requests access to PMS the supervisor designated in the request will need to review the submitted information and verify its accuracy. The supervisor information 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.

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New PMS User Request Approval Requested

PMSSupport@psc.gov
to me

12:23 PM (1 hour ago)

Dear Susi Bossman,

Percy Tester has requested access to the Payment Management System (PMS) and has listed you as their supervisor. Please click on the following link to review their request. If you approve, please click the approve button. If you do not approve, please click the reject button and provide your comments. If you click the reject button, the request will be returned to the originator for correction or rejection.


Payment Management System
```
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. 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.
Payment Management System Access Request - Supervisor View

REQUEST DETAILS

User Type: Grantee/Recipient
User Email: PercyGrantester@gmail.com
Request Status: Submitted

ORGANIZATION / INSTITUTION

Organization Name: Organization ABC
EIN/PIN: 123456789A1

CONTACT INFORMATION

Email Address: PercyGrantester@gmail.com
First Name: Percy
Middle Initial: G
Last Name: Tester
Job Title: Accountant
Address Line 1: 123 Anywhere Lane
City: Nowhere
State: AL - Alabama
Zip Code: 12345
Country: UNITED STATES
Telephone: +1 (222) 333-4444

ACCESS LEVEL

- Grantee Inquiry
- Account Maintenance
- Payment Requests
- Add/Update Banking
- Preparer
- Certifier

SUPERVISOR

First Name: Susi
Middle Initial: T
Last Name: Bossman
Job Title: Supervisor
Email Address: SusiTestbossman@gmail.com
Telephone: 222-333-4445

COMMENTS

New Employee Access

CERTIFICATION

I certify that the information, statements and representations provided by me on this form are true and accurate to the best of my knowledge. I understand that a willful false certification is a criminal offense and is punishable by law (18 U.S.C. 1001).
6. If the information needs revision then the Supervisor should select the ‘Supervisor Comments’ tab and provide the required changes in the comments section. The Supervisor should then 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 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 PSC home and PMS user login page.

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’.

Note: User name and passwords are case sensitive.

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.
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.