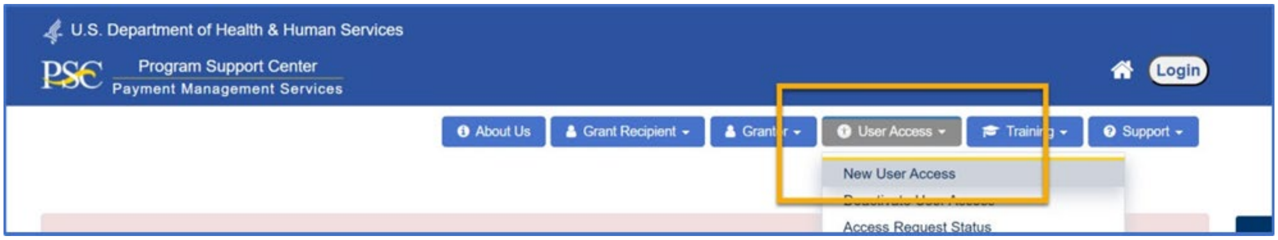
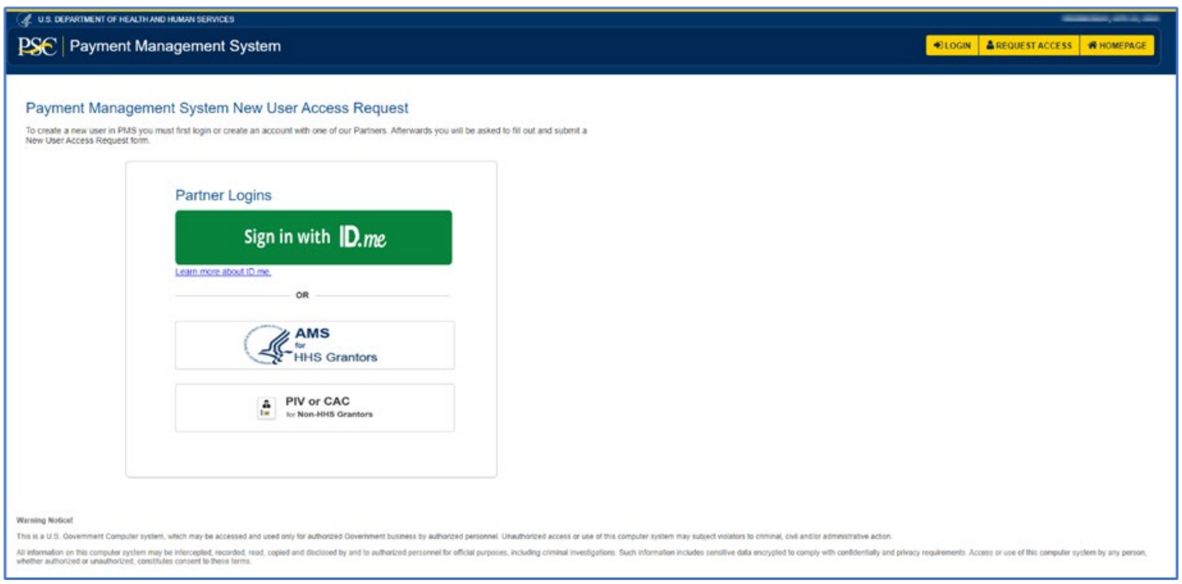
Access - New User Request Grant Recipient User

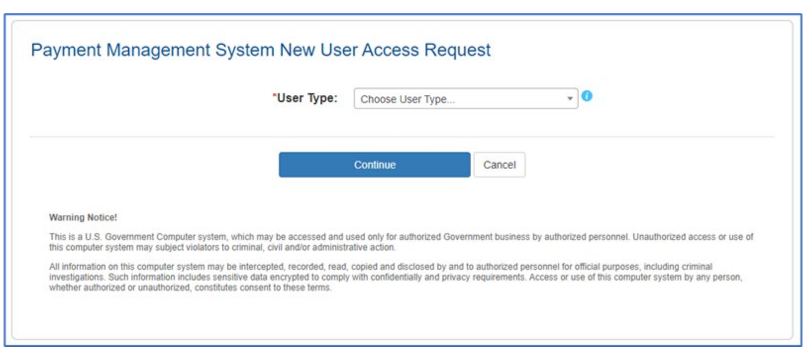
1. Access the PSC Home page at https://pms.psc.gov
2. Select the ‘User Access’ drop-down menu from PMS menu bar and select ‘New User Access.’



3. The “Payment Management System New User Access Request” screen is displayed.
   - To create a new user request in PMS you must first login or create an account with ID.me. Afterwards, you will be prompted to fill out and submit a New User Access Request Form.

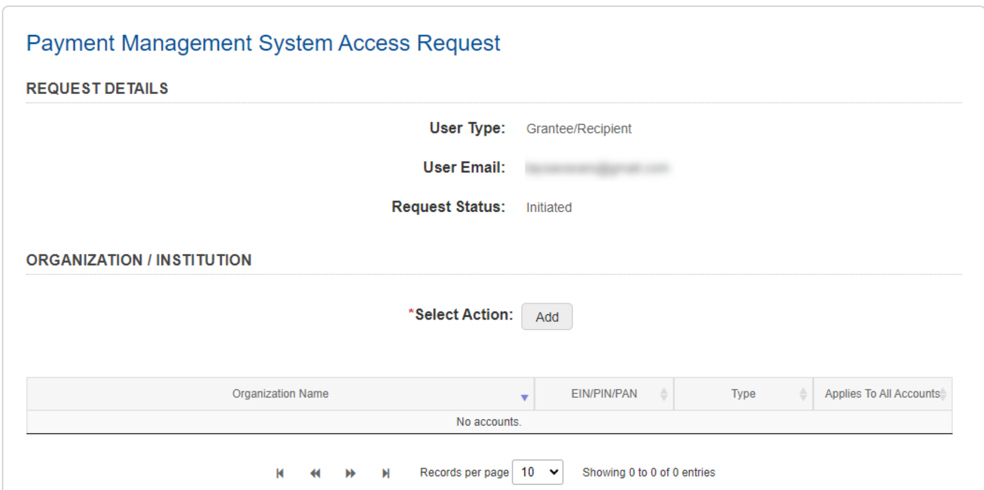


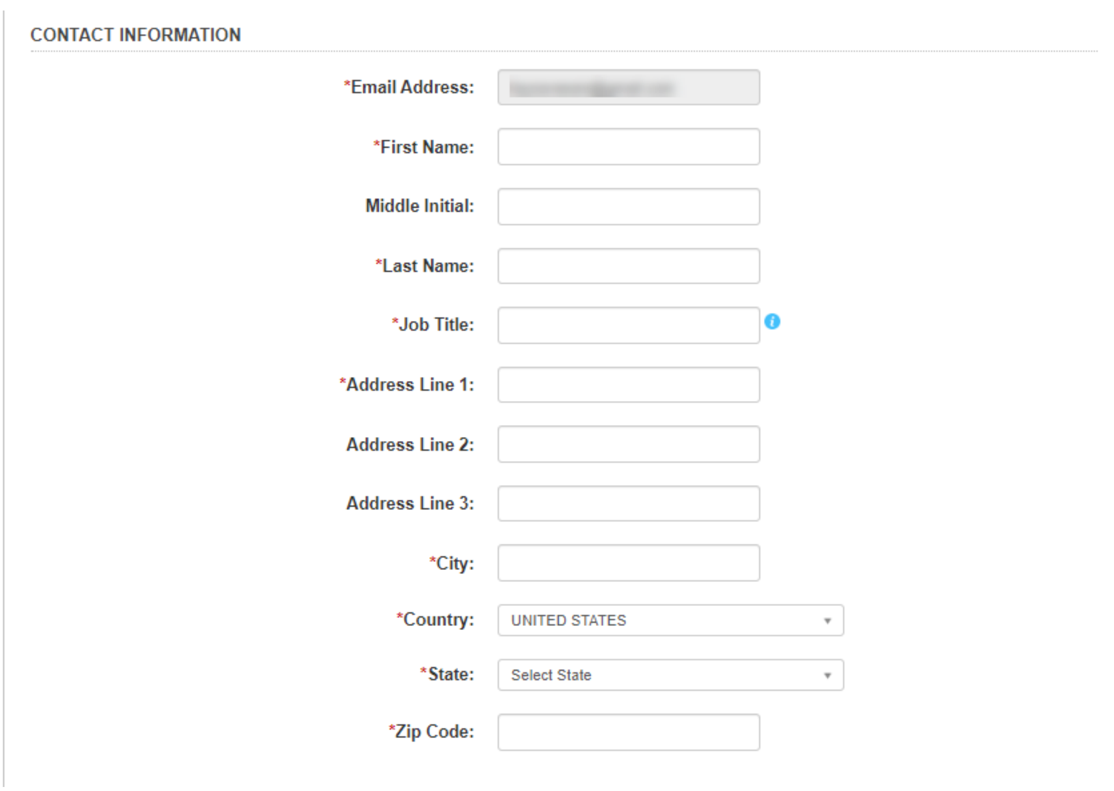
4. After logging in or creating an ID.me account, the “Payment Management System New User Access Request” form is displayed.



5. Select the User Type “Grantee/Recipient” from the drop-down menu and click “Continue.”

6. The remainder of the PMS Access Request form will be displayed, and requesters will need to provide:
    - Their organization's information including the organization name and either the organizations PMS EIN, PIN(s) or PAN(s) that the user needs access to.
    - User contact information comprising of their name, job title, work address and telephone number.
    - Select the type of access being requested.
    - The supervisor's information including their name, title, email, and phone number.
    - Optional comments may be provided.
    - PMS does not accept generic email addresses for users or supervisors. The email address must be unique to that individual and cannot be shared amongst multiple individuals.





ACCESS LEVEL

Please check all that apply (please note gray checked boxes are included):

- [x] Grantee Inquiry
- [x] Account Maintenance
- [ ] Payment Requests
- [ ] Add/Update Banking

Federal Financial Report (FFR): Federal Cash Transaction Report (FCTR)

- [x] View
- [ ] Preparer
- [ ] Certifier

Federal Financial Report (FFR)

- [ ] View
- [ ] Preparer
- [ ] Certifier

Financial Report DOL ETA-9130

- [ ] View
- [ ] Preparer
- [ ] Certifier

SUPERVISOR

Enter your supervisor's name and contact information below. If you are the highest ranking person in your organization, you may list yourself as the supervisor. Once the request is submitted, the person that is listed as the supervisor will receive an email with a link that they will need to use to approve the request. The person listed as the supervisor does not need access to the PMS to approve the request.

***First Name:**

Middle Initial:

***Last Name:**

***Job Title:**

***Telephone:**

***Email Address:**

ADD COMMENT

Comments:

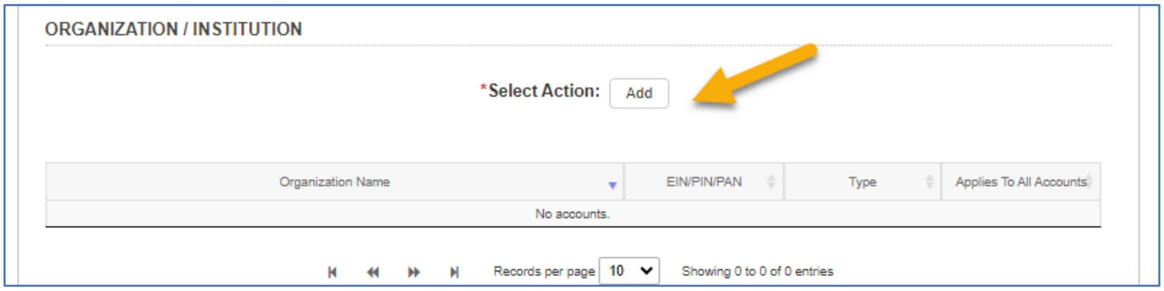
Maximum 1000 characters.

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 willfully false certification is a criminal offense and is punishable by law (18 U.S.C. 1001).

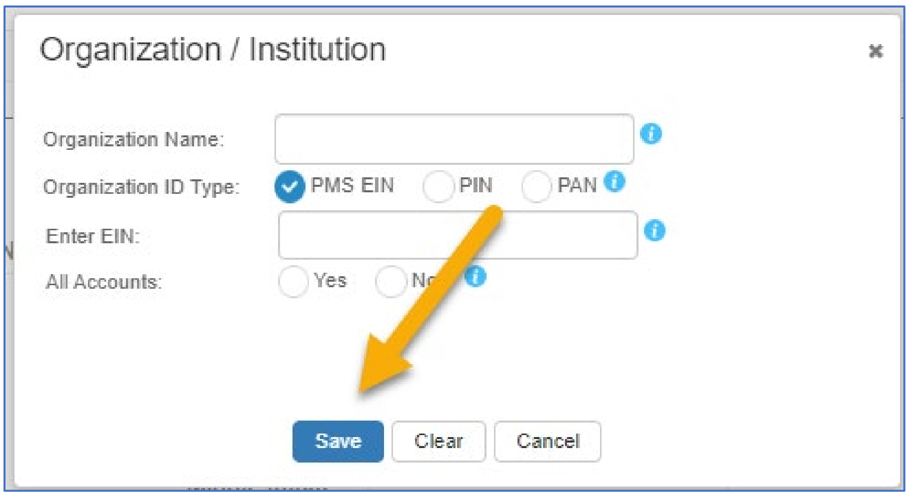
Clear Form | Submit | Save

7. 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.

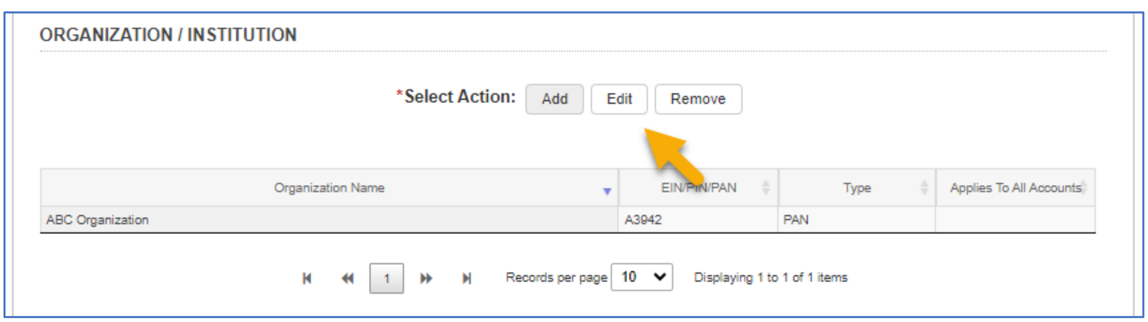


8. The Organization / Institution Pop-up Box will be displayed after selecting ‘Add.’ The Organization Name and Organization ID Type with need to be provided.
9. Available Organization ID Types include:
   - PMS EIN – Consists of the organizations Tax Identification Number, and PMS prefix and suffix.
   - 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.
   - PAN – Payee Account Number, issued by PMS.

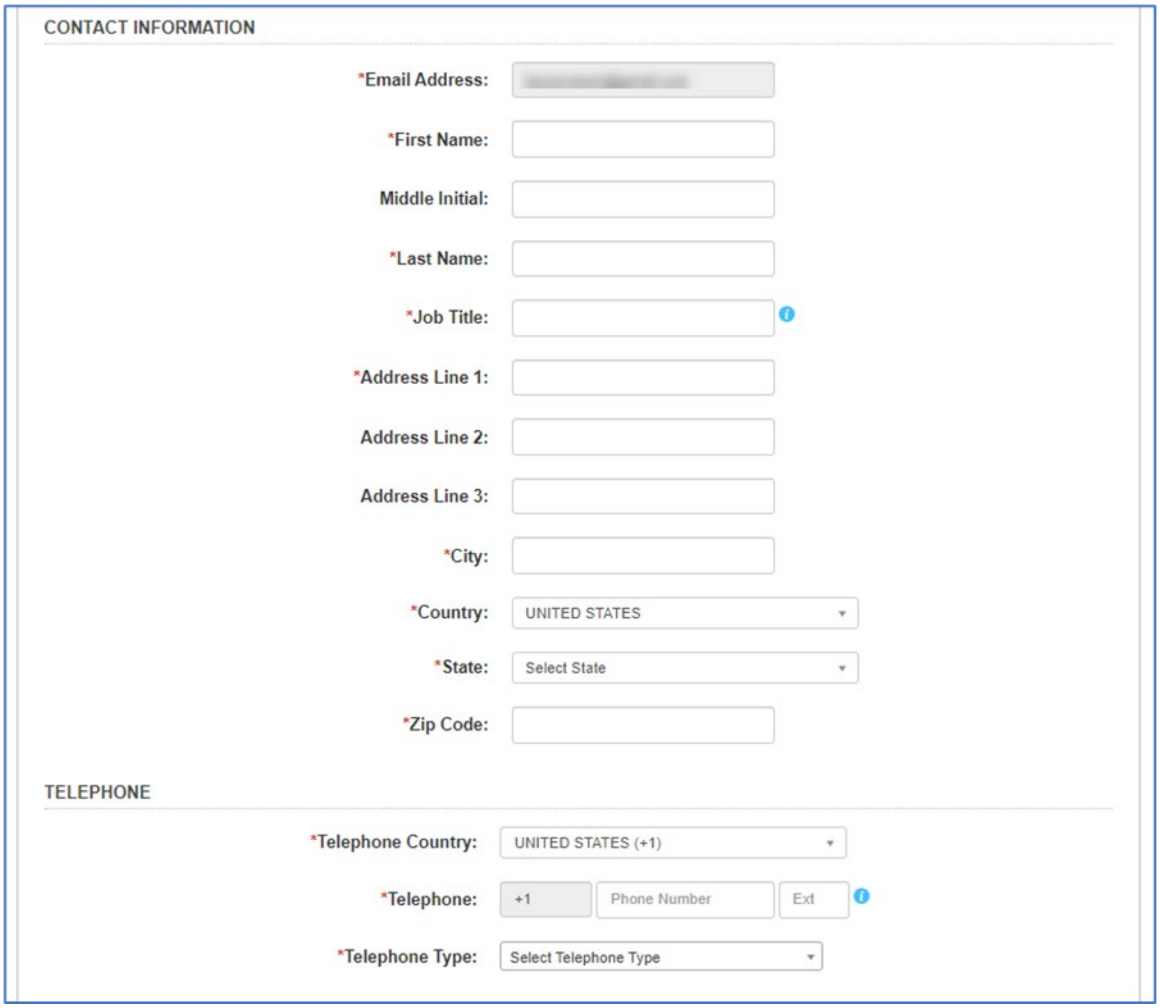
10. Additional guidance when adding PMS EIN, PINs and PANs
    - The PMS EIN, PIN or PAN must exist in PMS to be approved by PSC.
    - EIN is required to be 12 characters in length and must be a valid EIN in PMS.
    - PINs are required to be 4-5 characters in length. To add multiple PINs for an organization, 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.



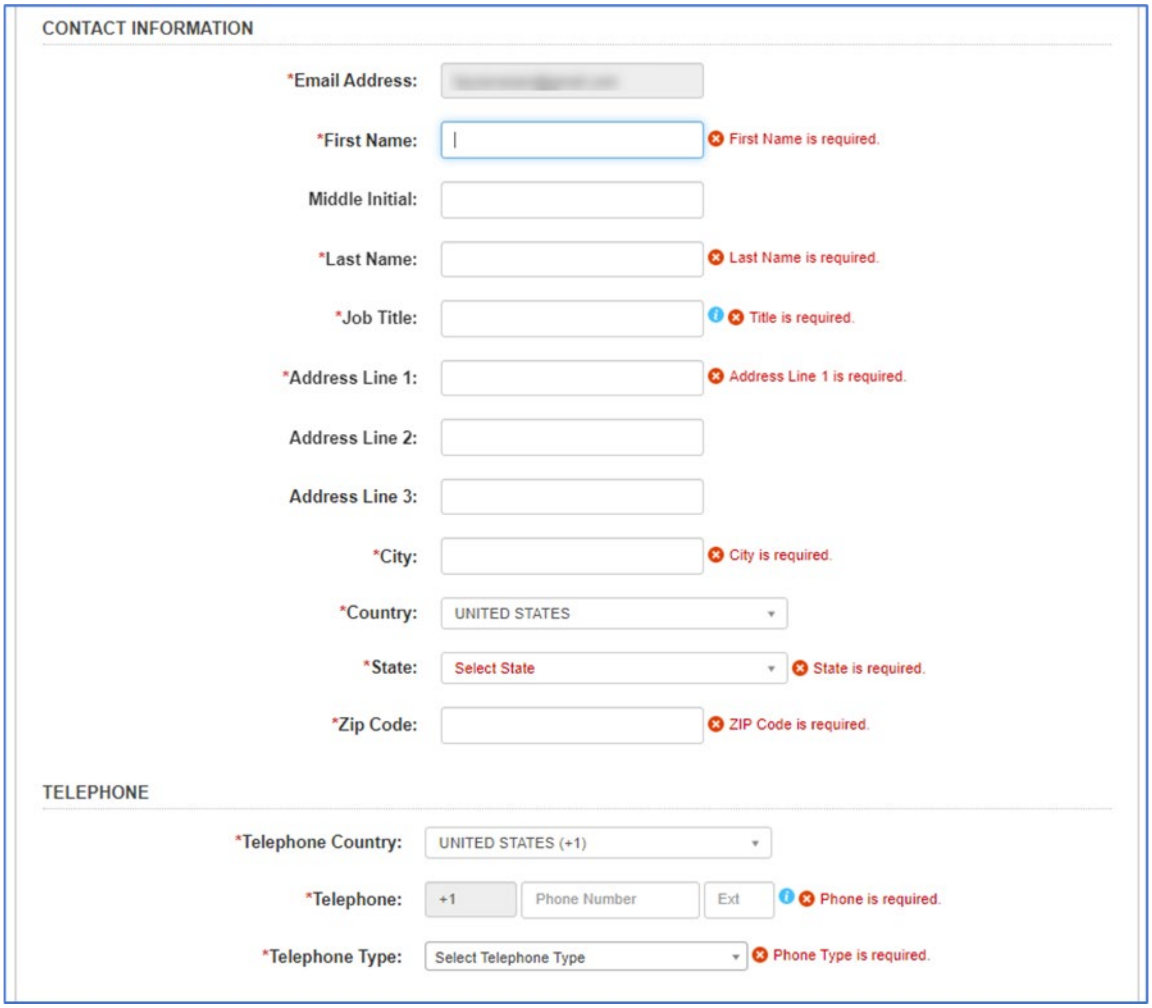
11. The organization information will be shown in the Organization/Institution Section upon clicking save.
12. To either ‘Remove’ or ‘Edit’ an organization, select the organization in the grid by clicking anywhere on the line and then select either ‘Remove’ or ‘Edit.’



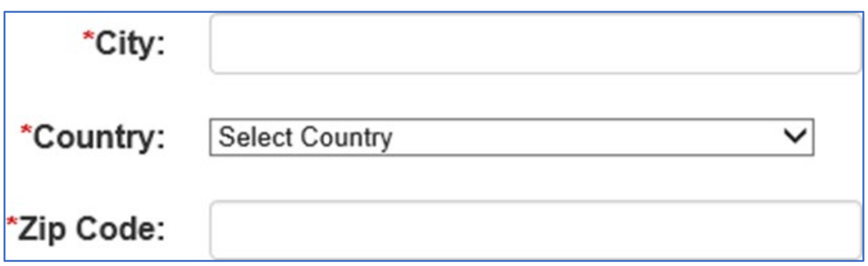
13. Within the ‘Contact Information’ section provide the following recipient contact information:
    - First Name
    - Middle Initial (optional)
    - Last Name
    - Job Title
    - Full Address, including Country
    - Phone number including Country code
    - Telephone number type



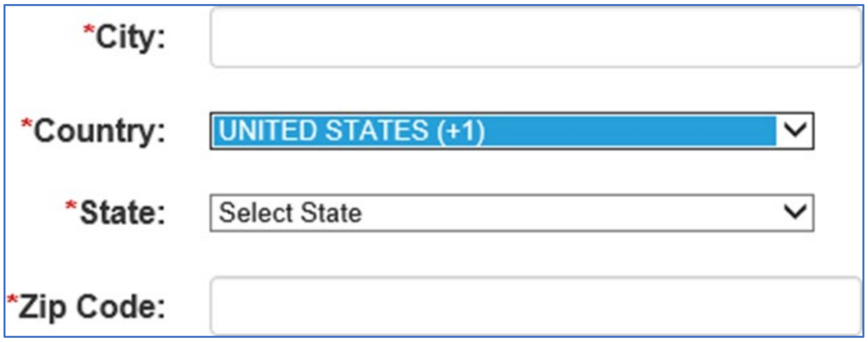
14. Error messages will be displayed for missing required information.



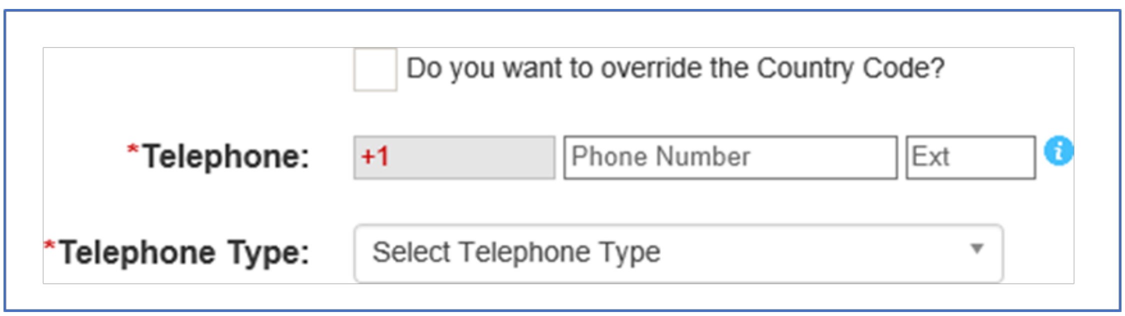
15. Select the country from the drop-down list provided.



16. 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.



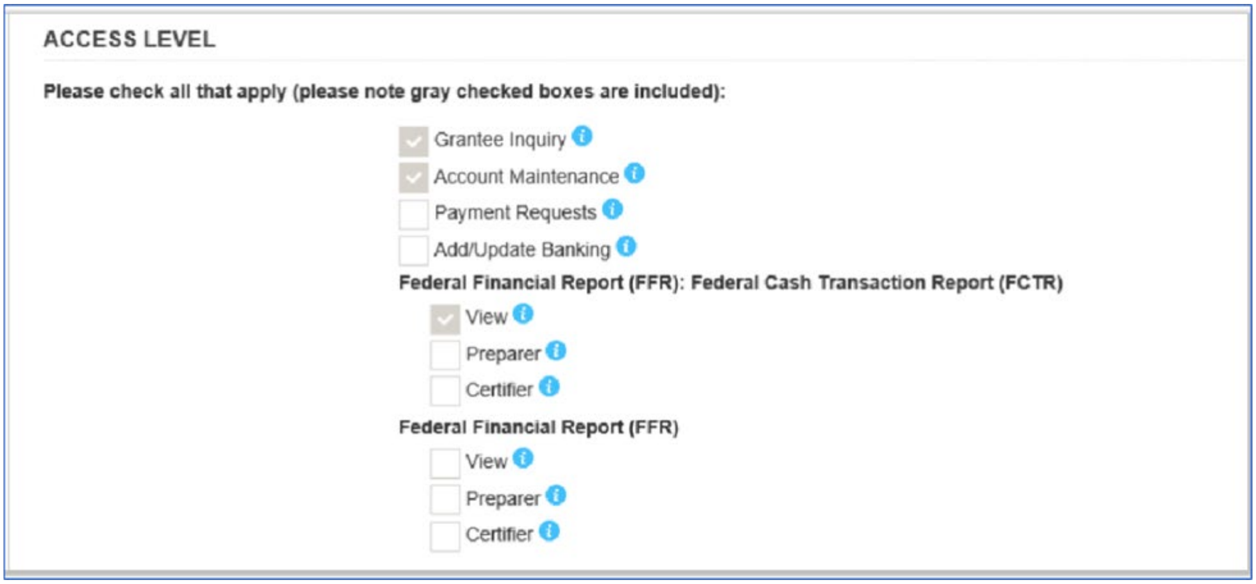
17. Provide a contact phone number. The country code for the phone number will automatically be filled in depending on the country selected in the address field. To override the country code, select the checkbox ‘Do you want to override the Country Code?’ and provide the appropriate country code.
18. Select from the ‘Telephone Type’ drop down box the phone type of the number provided.
    - Cell
    - Home
    - Office



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

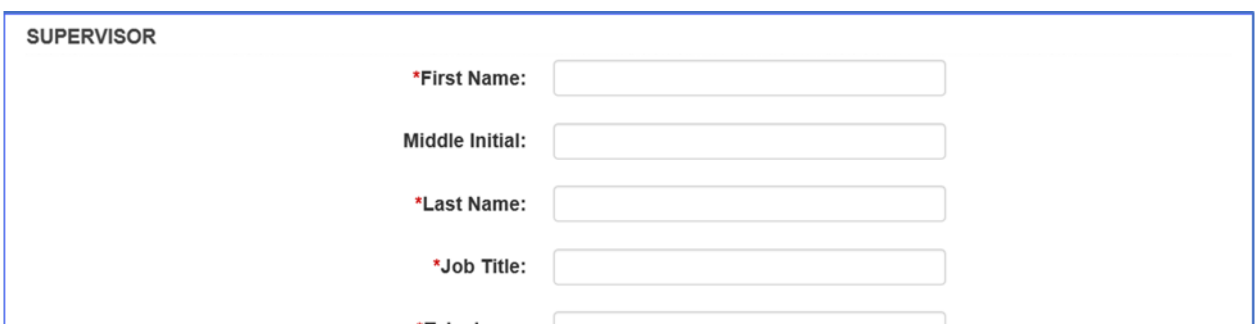
Access Level	Description
Grantee Inquiry	Default.
Account Maintenance	Default. Allows for updating of user information such as contact information.
Read Only Access	This access is inquiry only. This access should only be chosen when not choosing other accesses or in conjunction with FFR View access.
Payment Request	Access to request funds. This access includes the ability view inquiries.
Add/Update Banking	Access to add and update baking information for a payee account for both domestic and international bank accounts.
Federal Cash Transaction Report (FCTR) - View	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.
Federal Cash Transaction Report (FCTR) - Preparer	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.
Federal Cash Transaction Report (FCTR) - Certifier	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.
Federal Financial Report (FFR) - View	Access to view the expenditure report formerly known as the Federal Financial Report (FFR).
Federal Financial Report (FFR) - Preparer	Access to prepare the expenditure report. The ability to view the FFR is automatically included when choosing this option
Federal Financial Report (FFR) - Certifier	Access to certify the expenditure report. The ability to view the FFR is automatically included when choosing this option

20. Check all access levels required.



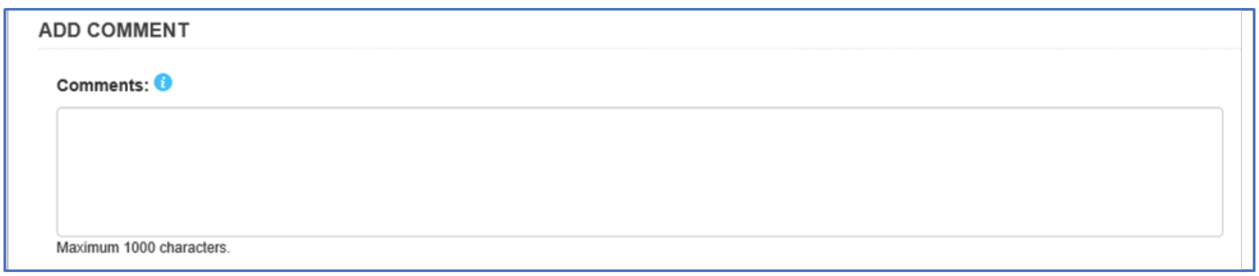
21. A supervisor will be required to approve the request. Provide your supervisors:

- First Name
- Middle Initial (optional)
- Last Name
- Job Title
- Telephone Number
- Email Address - NOTE: PMS does not accept generic email addresses for users or supervisors. The email address must be unique to that individual and cannot be shared amongst multiple individuals.

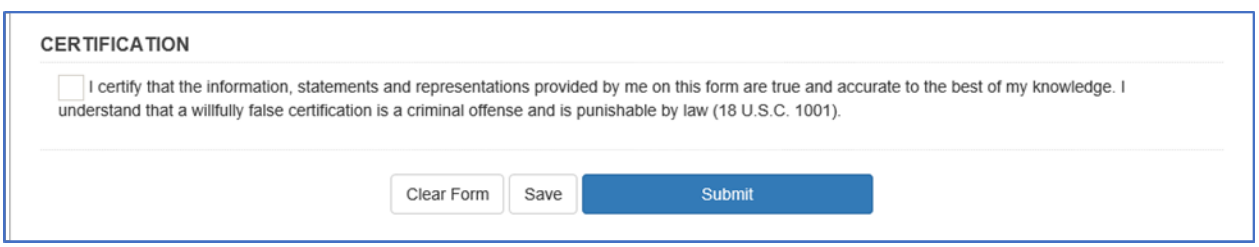


22. If you are the highest-ranking person in your organization, then provide your own information for the Supervisor information.

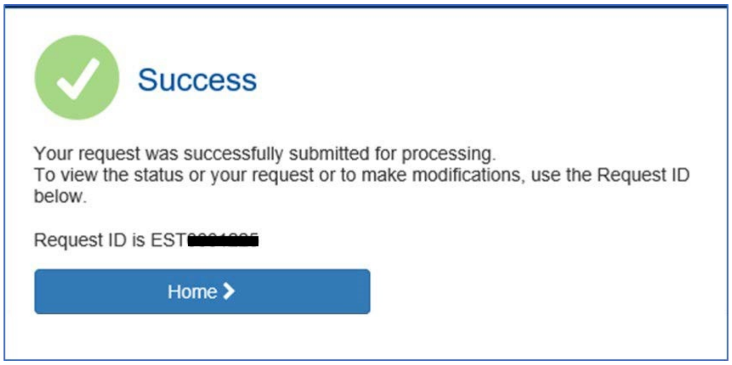
23. When the email addresses of the requester and supervisor match, the checkbox with the highest-ranking message will be display to the user to select and continue, otherwise an error message appears and can't submit the request.
24. If the recipient wants to explain why they need access or provide additional information to help PSC, verify their information they may provide this information in the comment field. Up to 1000 characters will be accepted.



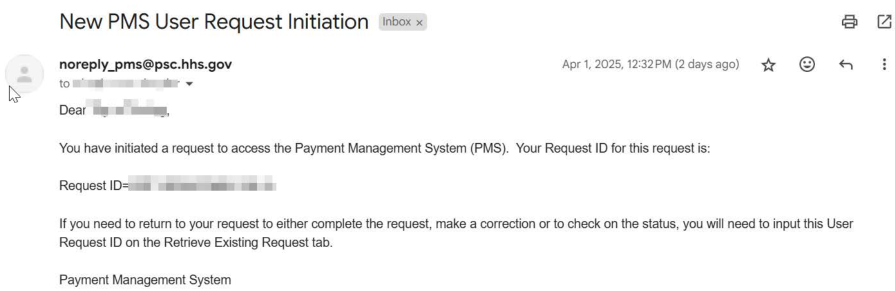
25. Prior to submitting the user will need to check the certification box indicating that all the information provided is true to the best of their knowledge. Providing willfully false information is a criminal offense and is punishable by law.



26. 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.
27. 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.
28. Click ‘Submit’ to send the request to the listed Supervisor for approval.
29. A ‘Success’ screen will be displayed containing the Request ID.



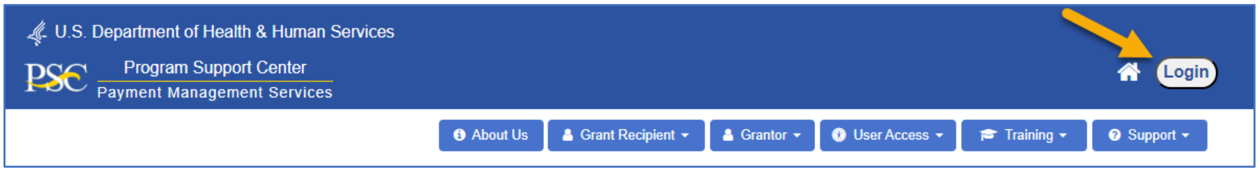
30. Additionally, an email will be sent to the user containing the 'Request ID'. The recipient will need to use the 'Request ID' along with the email address they used to initiate the request to check on the status of a request or make updates to saved requests.



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

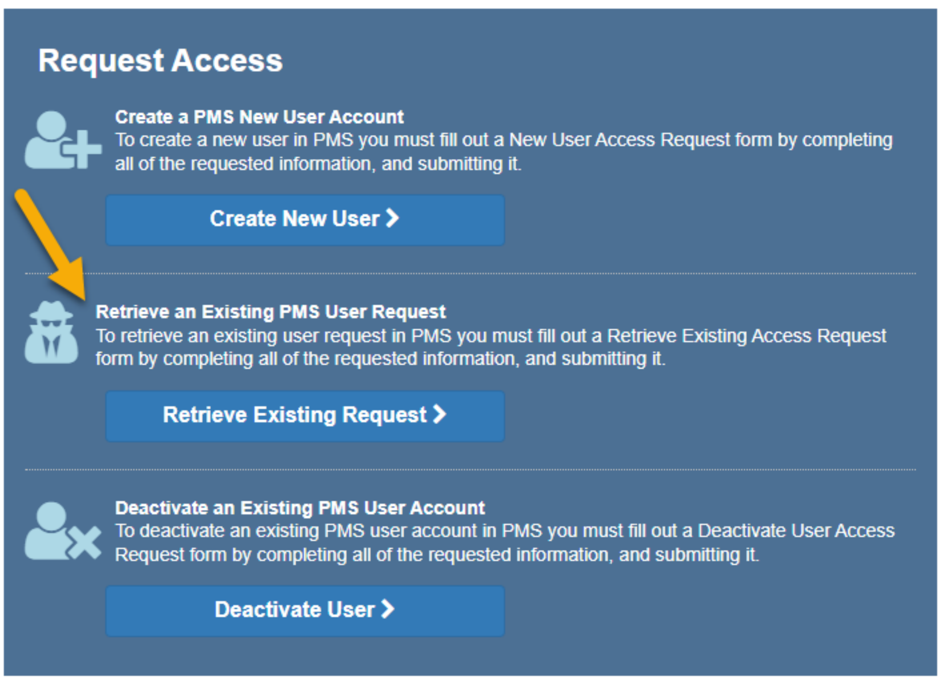
Retrieving Existing Requests

1. Recipients may return to requests to complete, fix, or to check on their status. To either return or check on the status of a submitted request, access the PMS Home page at https://pms.psc.gov.
2. Select 'Login.'

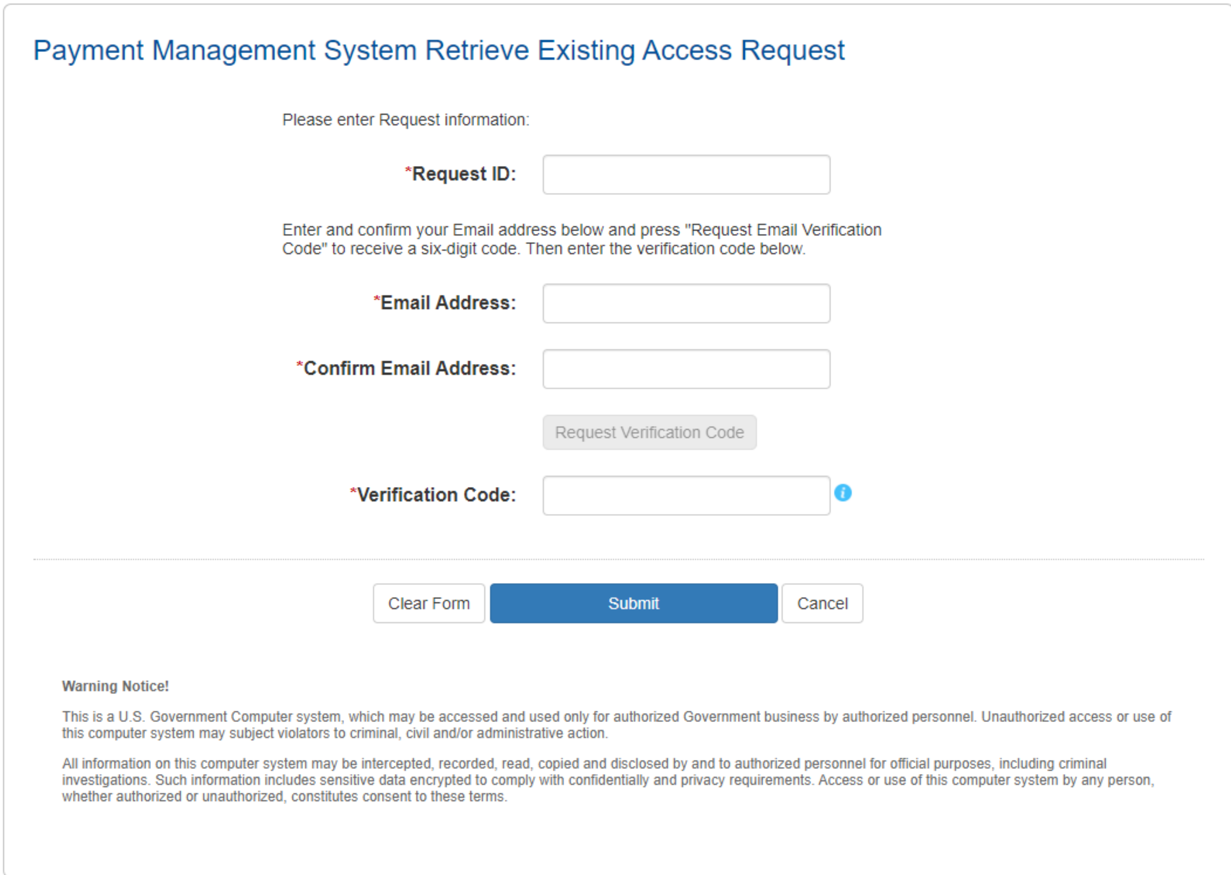


3. Select 'Request Access.'

4. Select 'Retrieve Existing Request.'



5. The user will be prompted to provide their Request ID and Email Address. Their request ID can be found in the email that was initially sent by the system to the user after submitting or saving the registration form. The email address must be the same email address used to create the account.



Payment Management System Retrieve Existing Access Request

Please enter Request information:

*Request ID:

Enter and confirm your Email address below and press "Request Email Verification Code" to receive a six-digit code. Then enter the verification code below.

*Email Address:

*Confirm Email Address:

Request Verification Code

*Verification Code:

Clear Form Submit Cancel

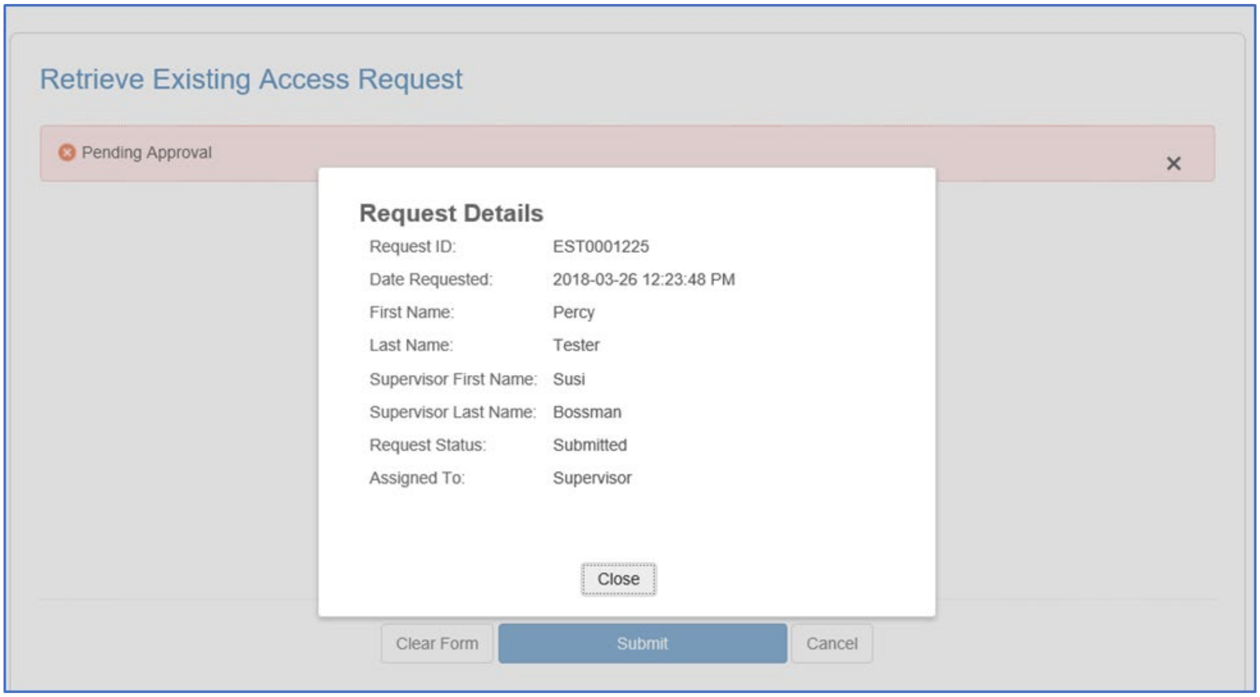
Warning Notice!

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.

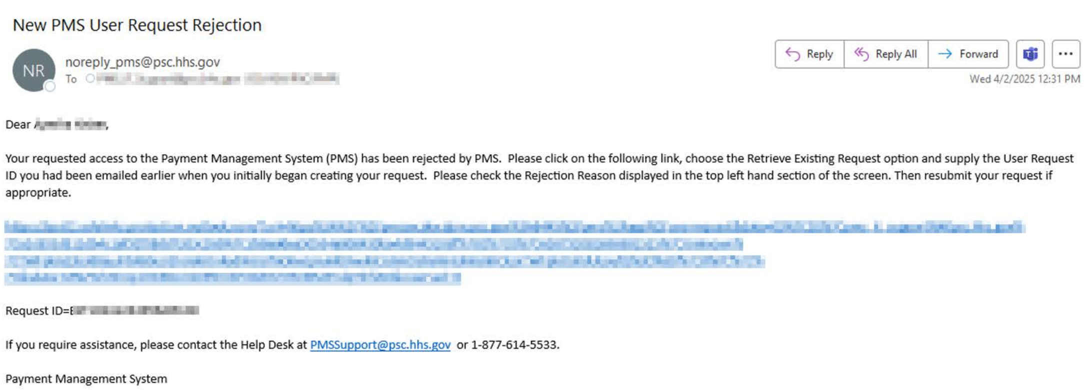
All information on this computer system may be intercepted, recorded, read, copied and disclosed by and to authorized personnel for official purposes, including criminal investigations. Such information includes sensitive data encrypted to comply with confidentially and privacy requirements. Access or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

6. 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.

7. 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.



8. For **REJECTED** requests, use the link provided in the rejection email.



9. 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.

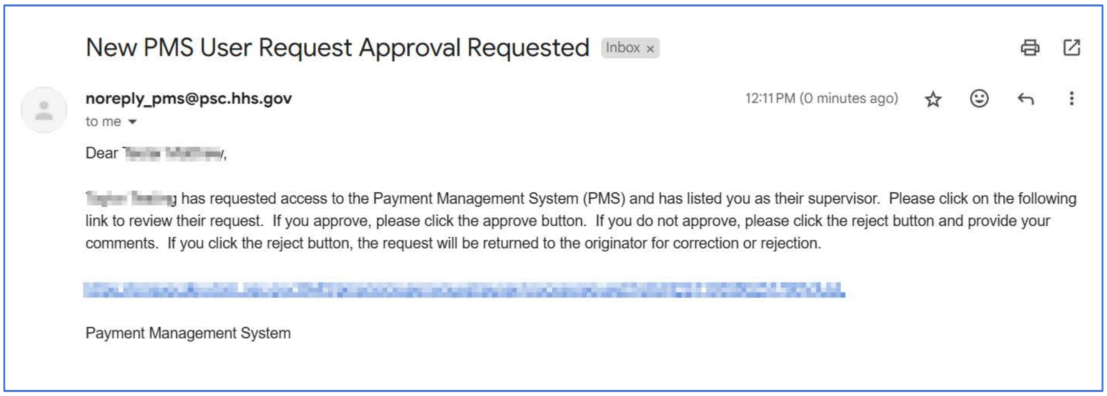
Supervisor Review

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 to verify and approve the information provided.

1. Click on the link within the email received.


New PMS User Request Approval Requested Inbox ×

noreply_pms@psc.hhs.gov 12:11 PM (0 minutes ago)

to me

Dear [illegible],

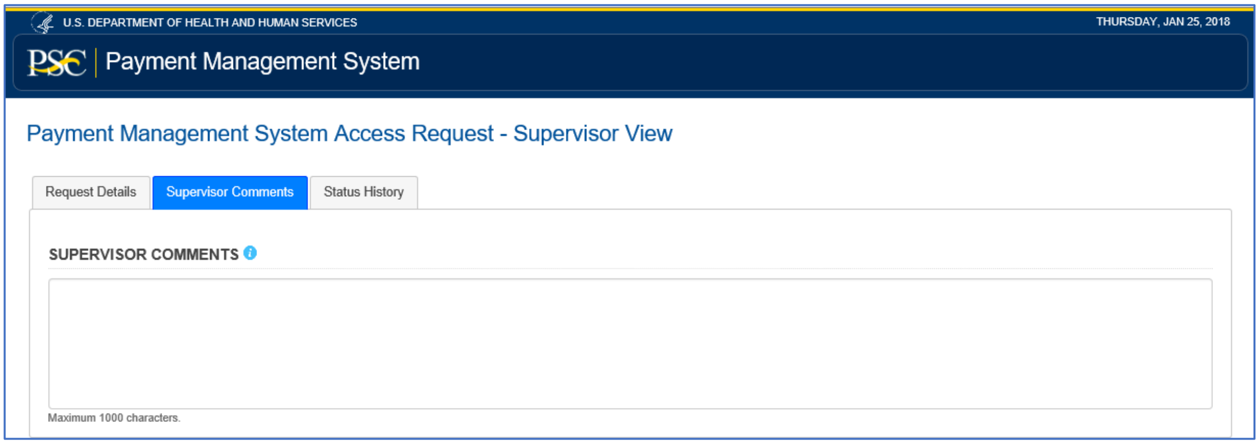
[illegible] has requested access to the Payment Management System (PMS) and has listed you as their supervisor. Please click on the following link to review their request. If you approve, please click the approve button. If you do not approve, please click the reject button and provide your comments.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

[illegible]

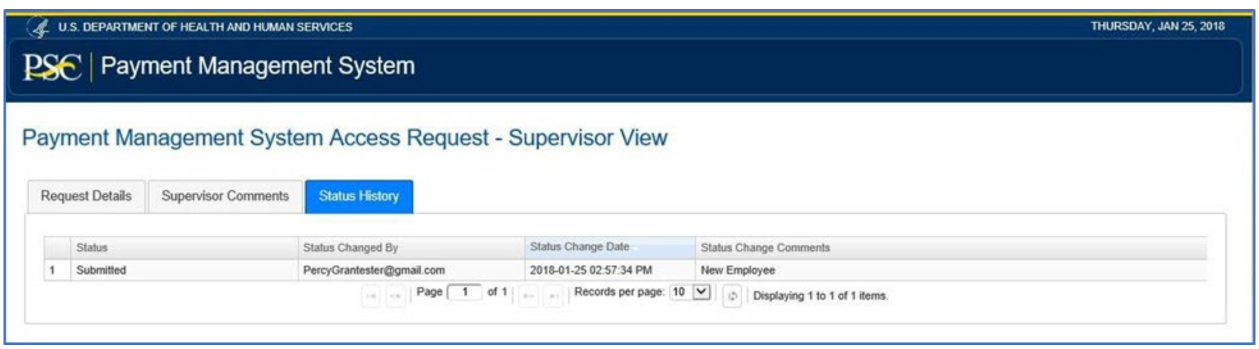
Payment Management System

2. The Supervisor view of the Payment Management System Access Request will be displayed.
3. The Supervisor view will consist of three tabs.
    - Request Details – will list the information that the user requesting the access provided.
    - Supervisor Comments – a place for the supervisor to enter any comments. Comments will be required when rejecting the request.
    - Status History – a list of previous comments and dates that apply to this request.
4. The Supervisor should review the information on the Request Details tab. The 'Request Details' tab is read-only for the supervisor.
5. 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.
6. Click the 'Approve' button. The request will then be sent to PSC for verification and approval.

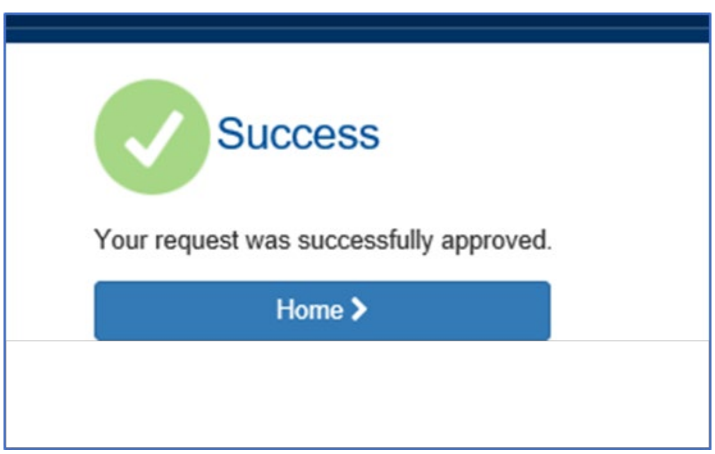
7. If the information needs revision, then the Supervisor should select the ‘Supervisor Comments’ tab and provide the required changes in the comments section. The Supervisor should then click on the ‘Reject’ button on the ‘Request Details’ tab. An email will be sent to the recipient indicating that the request has been rejected and the request will be available for the recipient to edit.



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



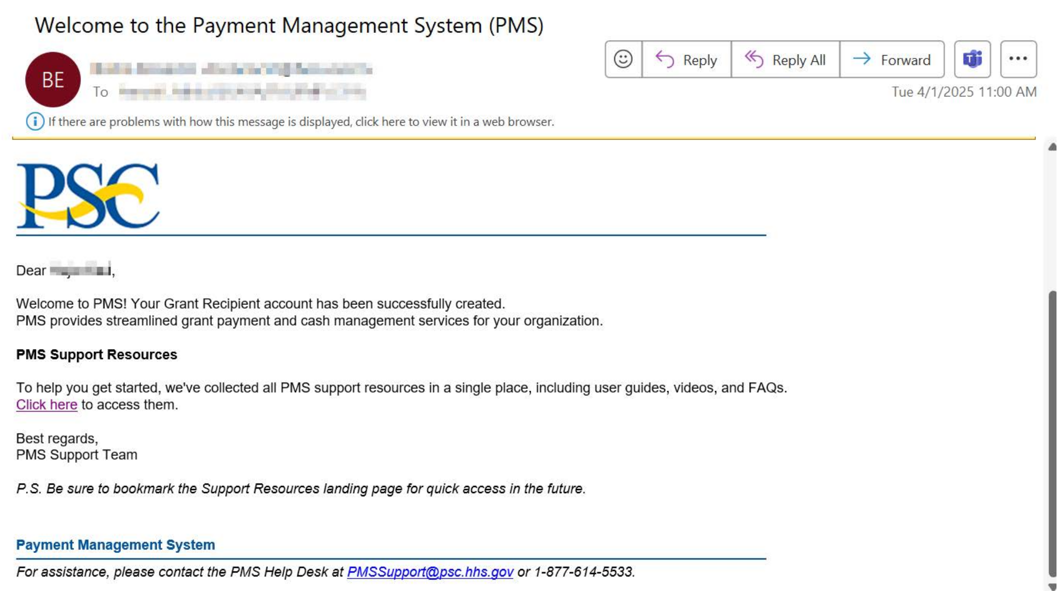
9. A success screen will be shown to the supervisor after they have approved the request.



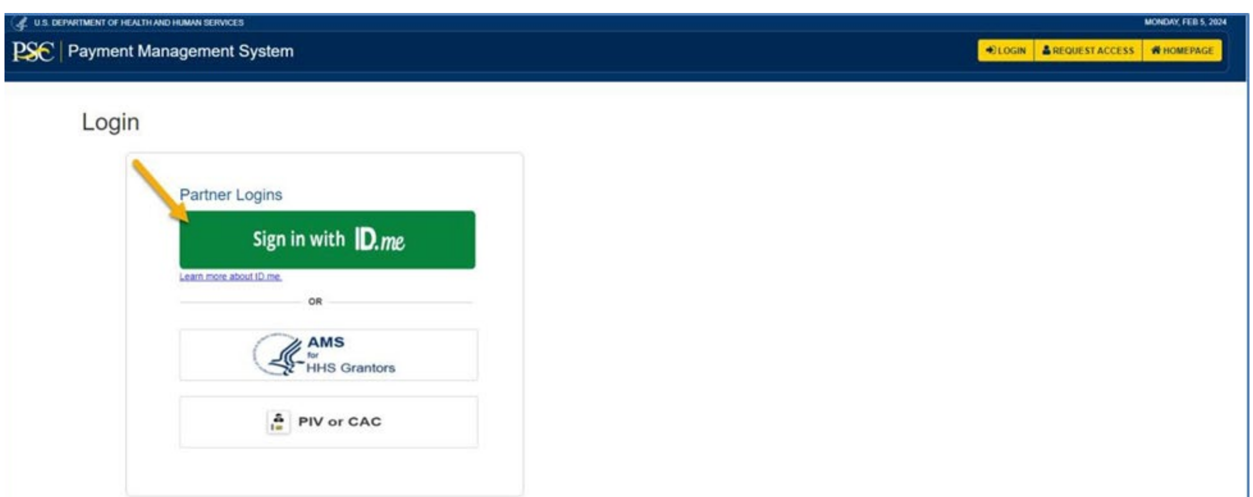
Logging in using our Partner Logins

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 'Welcome to the Payment Management System (PMS)'.

1. Use the link provided in the email to access Payment Management System's welcome page.



2. Using one of PMS' Partner Logins is now required for logging in to the PMS. Grant Recipients will use the option "Sign in with ID.me".



3. PDF User Guides for creating an ID.me account, can be found here: https://xms.hhs.gov/help/job-aids/help_pages.html
4. Any issues with ID.me accounts (e.g., password resets, username, inability to log in with ID.me credentials) should all be directed to ID.me's support page.
5. **International Users** will need to verify their identity with a Trusted Referee. Directions for this process can be found here: https://help.id.me/hc/en-us/articles/5976073273623-Using-your-Individual-Taxpayer-Identification-Number-ITIN-to-verify

7. 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.

8. The user will be brought to their PMS Dashboard.