



Agency Application User Access Recertification Guide

February 1, 2021



This version of the Pay.gov Services Overview supersedes all previous versions.

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Revision History

Date	Author	Description
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1 Introduction

This document provides an overview and instructions on Pay.gov's Agency User Access Recertification requirement. It should be read by agency users with the SEC role.

1.1 Related Documents

Read the *Pay.gov Guide to Access Control* for an overview and details about the roles assigned to agency users. It can be found at <https://qa.pay.gov/agencydocs/>.

2 Overview of Agency User Access Recertification

Agency user access recertification is a function on the Agency Collections (myagency) website. It allows agency users with the SEC role to recertify internal users roles and access to their agency's cash flow.

Note: The function cannot be used to add agency user access and roles to the cash flow application. That is done by submitting an Access Request Worksheet to Pay.gov. ARWs for each type of Pay.gov service are available at <https://qa.pay.gov/agencydocs/html/acforms.html>.

The function allows an SEC user to request that current agency users retain access and their roles for a cash flow application, change agency users' roles, or remove agency users' access to a cash flow application.

2.1 Agency User Access Recertification Required

Approximately every 365 days, your agency is required to request recertification of agency user access and roles for each of your cash flow applications.

- Agencies will receive a notification when the first recertification for a cash flow application is due.
- Subsequent recertification requests are due no later than 365 days from the date the previous request was approved by Pay.gov.

2.2 Recertification is a Request

The recertification information the SEC role submits to Pay.gov is only a request. Pay.gov reviews the request and, if correct, approves and completes user access recertification.

If Pay.gov rejects the request, the SEC user is notified of the reason and is given the opportunity to submit a new, corrected request.

2.3 Notification

Pay.gov sends an email notification in advance to your agency's SEC user informing when recertification is due.

Important! Agency user access must be recertified separately for each cash flow application. For example, if your agency has three cash flow applications, your SEC user will receive three separate notifications, probably on three separate dates.

SECs will receive additional reminder emails until recertification is complete.

2.4 Agency Collections (myagency) Recertification Function

The recertification function is available on the Agency Collections (myagency) website. It may be disabled when no recertification is needed for your cash flow application(s).

Agency users with the SEC role can:

- Confirm existing agency user access and roles
- Add roles for existing agency users
- Remove roles from existing agency users
- Remove agency user access to the application

Important! You cannot add user access through the recertification function. To add user access to a cash flow application, an Access Request Worksheet must be submitted to Pay.gov.

2.5 Limited Recertification Availability Period

For each cash flow application, the function is available from the first email notification, and is disabled when you submit your recertification request. (or after the due date if recertification has not been completed).

Availability may be extended or reinstated by Pay.gov in cases where the recertification is rejected by Pay.gov.

2.6 SEC Role

Only an agency user who has been assigned the SEC role can access the recertification function on the myagency website and request recertification. The SEC role can be assigned to any agency user. Agency users can be assigned other roles in addition to SEC.

3 Recertification Steps

Only an agency user who has been assigned the SEC role can request recertification.

1. Receive eMail Notification

Pay.gov emails a notice to your agency's SEC users.

- The email contains
- The name of the application that requires recertification.
- The due date for recertification.
- A link to the myagency website.
- The status of the application (Pending Agency Security Review)

2. Sign In to myagency Website

Figure 1: Agency Collections (myagency) home and sign in page



Sign in to the Agency Collections (myagency) website using the correct SEC username and password -- <https://www.pay.gov/myagency/>.

3. Click the Recertification Tile

Figure 2: User Access Recertification tile and link



Click the User Access Recertification tile or the link near the top right.

The tile and link are enabled from the date you receive the email notice until the recertification due date. Under some circumstances they may be reenabled by Pay.gov.

If your role allows access to other services or functions other tiles will be displayed.

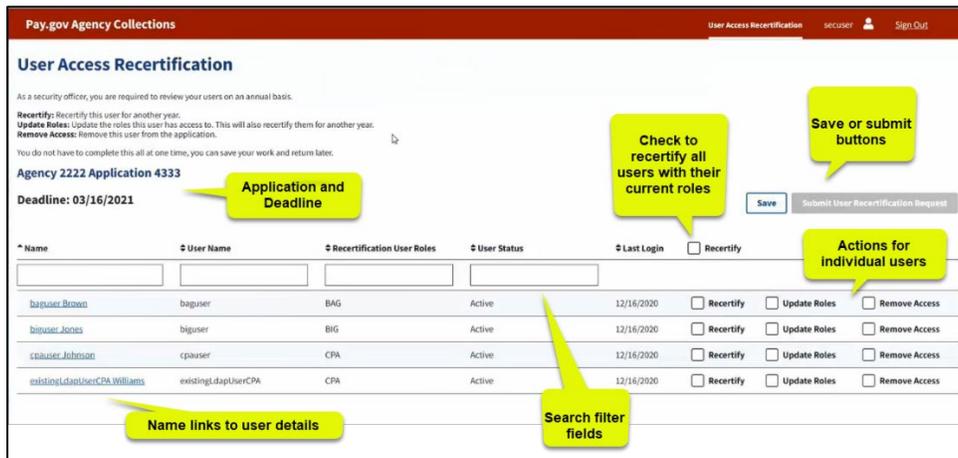
4. Choose the Application, if Necessary

If more than one cash flow application requires recertification, choose the application to recertify from the dropdown list. An example is when the recertification periods for two or more applications overlap.

If only one application requires recertification, the User Access Recertification page immediately opens showing the application’s agency users.

5. Page Contents

Figure 3: User Access Recertification page



The top left of the recertification page shows the application requiring recertification and its recertification deadline.

Important! The certification request must be submitted no later than the deadline date.

Buttons at right allow you to save or submit the recertification request.

Table 1: User Access Recertification page sections

Column	Description
Name	A link showing the name of the person with access to the application. Clicking the link displays a popup with details about the person
User Name	The sign in user name of the person with access.

Column	Description
Recertification User Roles	All the roles assigned to the user for the application.
User Status	Current status of the user: <ul style="list-style-type: none"> • Active • Deactivate
Last Login	Date the user last signed into Pay.gov's myagency website.
Recertify checkbox	Check this box to recertify all users with their current roles
Individual actions	Check a box to recertify or change access for the row's user. <ul style="list-style-type: none"> • Recertify – recertify this user with their current role(s). • Update Roles – Add or change this user's role(s). Opens a popup where roles can be selected. • Remove Access – remove this user's access to the application. <p>Note: If you check the Recertify box for all users, and then make changes for an individual user, the Recertify box for all users will be automatically unchecked.</p>

6. Recertify All Users

Check the Recertify box above the user list to recertify all users with their current role(s). Changes to individual user's roles and access can still be made.

7. Recertify Individual Users

Note: If roles are changed for an individual user after checking the top Recertify box (recertifying all users with their current roles), automatically unchecks the top Recertify box. The recertify action for all other users is not affected.

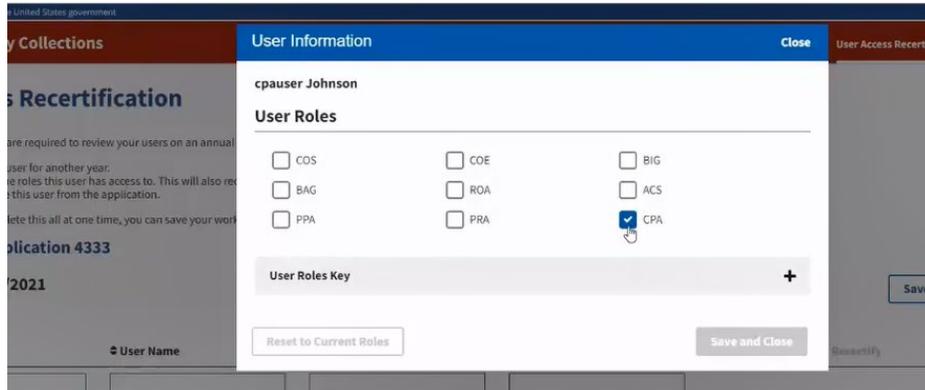
Recertify Individual User

Check the Recertify box for the user to request recertification with their current role(s).

Change Individual Role(s)

Check Update Roles to add or change the user’s roles. When the box is checked, a popup is displayed showing checkboxes for all available roles.

Figure 4: User Roles popup



Check a box to add a role.

Uncheck a box to delete a role.

When finished, click Save and Close. The button is not enabled until a role change is checked. The Recertification User Roles column is immediately updated.

Click Reset to Current Roles to discard all changes

Note: You can update the user’s roles again by checking the Update Roles box before the request is submitted.

If you are unsure of what a role allows, click User Roles Key for explanations.

Remove Individual Access

Check Remove Access to delete the user’s access to the application. The user will not be able to see the cash flow application on the myagency website and will not be able to perform any role.

8. Save or Submit the Recertification Request

Save

Save the information only. Later you can and return to continue and submit the request.

Submit User Recertification Request

The Submit Recertification Request button is disabled until an action is taken for all the application’s agency users.

Click the button to send the request to Pay.gov for review and approval.

Confirmation

When done, click the Submit Recertification Request button.

A confirmation message on the page shows your request has been submitted to Pay.gov.

Figure 5: Confirmation and CSV link



Download CSV File Summarizing the Request

Click the CSV Comma Separated Values) link to download the file. To view the file, you need to open it in Microsoft Excel or similar application.

On this page is a link that allows SEC user to download a CSV file of the recertification summary data. (

The link is available until the next recertification request for the application (approximately nine months).

Figure 6: Recertification summary CSV file in MS Excel

1	2	3	4	5	6	7	8
Application	Recertification deadline	User's full name	Username	Last Login	Recertification action	Current User Roles	Requested User Roles
Agency 2222 Application 4333	3/16/2021	existingLdapUserCPA Williams	existingLdapUserCPA	12/16/2020	RECERTIFY	CPA	
Agency 2222 Application 4333	3/16/2021	biguser Jones	biguser	12/16/2020	DELETE	BIG	
Agency 2222 Application 4333	3/16/2021	baguser Brown	baguser	12/16/2020	RECERTIFY	BAG	
Agency 2222 Application 4333	3/16/2021	cpauser Johnson	cpauser	12/16/2020	UPDATE	CPA	BAG,COS,PPA

Table 2: CSV file columns

Column	Description
Application	Name of the application being recertified
Recertification deadline	Calendar date by which recertification must be completed.
User's full name	Full name of the user being recertified.
Username	Agency user's sign in username.
Last Login	Date the user last signed into Pay.gov's myagency website.

Column	Description
Recertification action	The recertification action requested for the agency user. <ul style="list-style-type: none"> • Recertify – recertify this user with their current role(s). • Update – role(s) that were added or changed. • Delete – agency user’s access to the cash flow application is to be removed.
Current User Roles	Role(s) assigned to the agency user before the recertification request.
Requested User Roles	Requested additional or changed roles. Blank if no roles are added or changed, the cell is blank

9. Pay.gov Review

Pay.gov reviews the recertification request. Pay.gov can approve or reject it.

Approve

Upon approval, access to the cashflow application continues and agency user roles are updated. There may be a delay between submission and approval.

Upon approval:

- Changes to agency user roles and access are effective the next time a user signs in.
- Recertification for the cash flow application is disabled on the Agency Collections (myagency) website.
- The Recertification Summary CSV file can still be downloaded, and is available until the next recertification period begins (in approximately nine months).

You can still request adding agency user access and roles at any time by submitting an Access Request Worksheet (ARW).

Reject

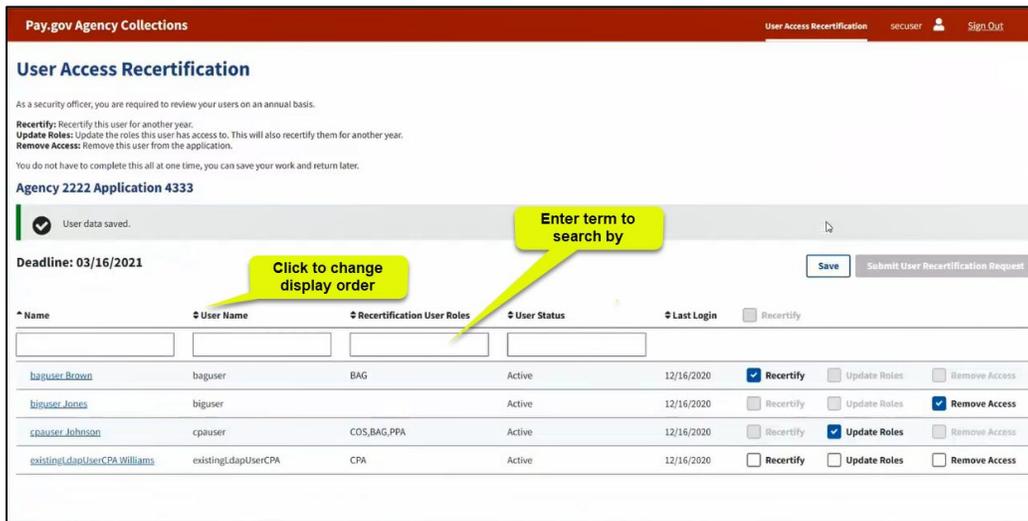
Pay.gov can reject the recertification request if it is determined that changes are needed (for example a role needed for the application has not been assigned).

If a request is rejected:

1. The User Access Recertification tile and links are active.
2. The link to download the Recertification Summary CSV file disappears. A new download link appears after a new request is submitted.
3. The SEC users receive an email informing them of the rejection and the reason.
4. When the User Access Recertification page opens all checkboxes are in the same state as when the request was submitted.
5. The SEC user must make the required changes and submit the request again.

4 Reorder or Search

Figure 7: User Access Recertification page reorder and search

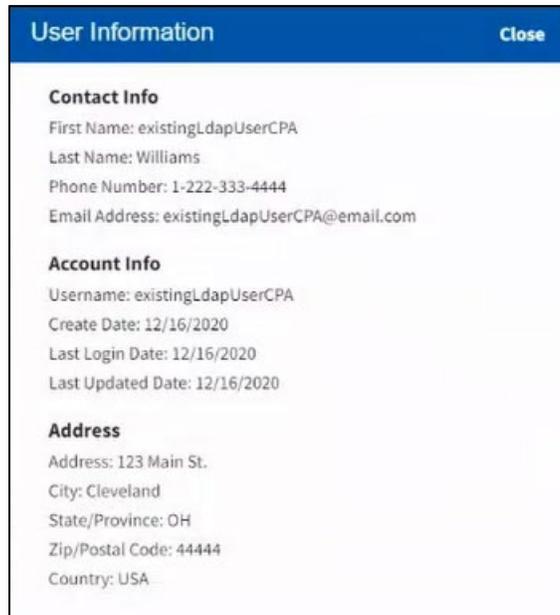


Click the arrows next to the column names to change the order in which users are listed – ascending or descending order.

To restrict the users displayed, or to search for specific users enter information into the correct fields above the list. The list will be filtered as you enter.

5 View Agency User Details

Figure 8: User Information popup



The image shows a 'User Information' popup window with a blue header and a 'Close' button. The content is organized into three sections: Contact Info, Account Info, and Address. Each section lists specific user details.

User Information		Close
Contact Info		
First Name:	existingLdapUserCPA	
Last Name:	Williams	
Phone Number:	1-222-333-4444	
Email Address:	existingLdapUserCPA@email.com	
Account Info		
Username:	existingLdapUserCPA	
Create Date:	12/16/2020	
Last Login Date:	12/16/2020	
Last Updated Date:	12/16/2020	
Address		
Address:	123 Main St.	
City:	Cleveland	
State/Province:	OH	
Zip/Postal Code:	44444	
Country:	USA	

Click on a user's name (in the name column) to view details about the user and their account.

6 Customer Support

Customer support is provided by the Federal Reserve Bank of Cleveland. Assistance with accessing the website, hosted forms processing, collections, and so on is provided for agency customers. Technical support is also available for problems such as balancing payments, database integrity, information security, and other issues relating to the smooth operation of the services provided to the agency.

6.1 Contact Information

Hours: 7:00 am to 7:00 pm Eastern Time

Monday through Friday, Closed Bank Holidays

Phone: (800) 624-1373, Option 2

Email address: pay.gov.clev@clev.frb.org