



Agency Guide to Company Profiles

July 1, 2019



This version of the Agency Guide to Company Profiles supersedes all previous versions.

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Revision History

Date	Author	Description
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1 Introduction

Company profiles allow government agencies using the Pay.gov Forms Service to configure a limited number of company fields and application-level scope fields as part of a company profile. These can then be associated with one or more customer accounts and will be available to populate values in forms.

The availability of company profile and application-level scope fields provide agencies with greater flexibility in designing forms. Instead of creating, testing, and deploying a new revision of a form each time a value such as an interest rate or taxation rate changes, agencies may define these values as application-level scope fields, which can be populated from the company profile and administered independently of the form. This significantly reduces the form development and testing effort and allows these types of changes to be implemented rapidly.

This guide is intended primarily for agency users who will be responsible for maintaining company profiles associated with their Pay.gov Forms Service cash flow applications. Agency customer service staff members will also find this guide informative.

1.1 Related Documents

Related and supplemental agency guides and reference manuals are available on the Pay.gov Agency Documentation site at <https://qa.pay.gov/agencydocs/> or by request from Pay.gov Customer Support.

2 Defining Company Profiles

Agencies wishing to use company profiles with their application should work with their Bureau of the Fiscal Service agency liaison and their Pay.gov Agency Implementation Liaison to enable the company profile option. Field labels and data types for any application-level scope fields to be used are defined in the Application Configuration Template (ACT); this will be discussed in more detail in section 2.1.

Once enabled in the application, the actual company profiles are created by agency users assigned the Company Profile Administrator (CPA) role. These users will be responsible for managing the company profiles for their agency application(s). Users with the CPA role will be able to create and modify company profiles and application-level scope field values; assign users to company profiles, and assign company profiles to users. They will also have most enrolled user permissions and public user permissions. The CPA role may be combined with other agency-level roles.

2.1 Defining Company Profile Options

Each company profile has ten predefined fields, which are described below.

1. Active Company Profile (checked=active, unchecked=inactive, which is the default value for the field).
2. Company ID (required field; may contain up to 80 alphanumeric characters)
3. Company Name (required field; may contain up to 80 alphanumeric characters)
4. Address 1 (may contain up to 80 alphanumeric characters)
5. Address 2 (may contain up to 80 alphanumeric characters)
6. City (may contain up to 40 alphanumeric characters)
7. State (may contain up to 32 alphanumeric characters)
8. ZIP/Postal Code (may contain up to 20 alphanumeric characters)
9. Country (may contain up to 3 alphanumeric characters)
10. Phone (may contain up to 32 alphanumeric characters)

Enabling company profiles for an application also activates up to ten application-level scope fields. Agencies will specify in the ACT the label and data type for each application-level scope field and if the field will be encrypted in the database. Help text may also be specified for each field.

2.1.1 Application-Level Scope Field Labels

Labels for the scope fields may contain up to 30 alphanumeric characters.

2.1.2 Application-Level Scope Field Data Types

Each application-level scope field may contain one of six data types: string, number, decimal, Boolean, currency, or percent. These data types are defined in Table 1.

Table 1: Allowable data types for application-level scope fields

Field Type	Definition																						
String	<p>A string field is used to contain textual information and may only contain the following characters:</p> <table border="1"> <thead> <tr> <th>ASCII Value</th> <th>Character</th> </tr> </thead> <tbody> <tr> <td>32</td> <td>space</td> </tr> <tr> <td>44</td> <td>, (comma)</td> </tr> <tr> <td>45</td> <td>- (hyphen)</td> </tr> <tr> <td>46</td> <td>. (period)</td> </tr> <tr> <td>48-57</td> <td>0,1,2,3,4,5,6,7,8,9</td> </tr> <tr> <td>58</td> <td>: (colon)</td> </tr> <tr> <td>64</td> <td>@ (at sign)</td> </tr> <tr> <td>65-90</td> <td>A,B,C,D,E,F,G,H,I,J,K,L,M,N,O,P,Q,R,S,T,U,V,W,X,Y,Z</td> </tr> <tr> <td>95</td> <td>_ (underscore)</td> </tr> <tr> <td>97-122</td> <td>a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z</td> </tr> </tbody> </table>	ASCII Value	Character	32	space	44	, (comma)	45	- (hyphen)	46	. (period)	48-57	0,1,2,3,4,5,6,7,8,9	58	: (colon)	64	@ (at sign)	65-90	A,B,C,D,E,F,G,H,I,J,K,L,M,N,O,P,Q,R,S,T,U,V,W,X,Y,Z	95	_ (underscore)	97-122	a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z
ASCII Value	Character																						
32	space																						
44	, (comma)																						
45	- (hyphen)																						
46	. (period)																						
48-57	0,1,2,3,4,5,6,7,8,9																						
58	: (colon)																						
64	@ (at sign)																						
65-90	A,B,C,D,E,F,G,H,I,J,K,L,M,N,O,P,Q,R,S,T,U,V,W,X,Y,Z																						
95	_ (underscore)																						
97-122	a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z																						
Number	A number field may only contain integers (whole numbers).																						
Decimal	A decimal field may only contain numbers with decimal fractions.																						
Boolean	A Boolean field may only contain the values TRUE or FALSE.																						
Currency	This field may contain two decimal places and will apply U.S. currency formatting.																						
Percent	The numeric value contained in a percent field is defined as a percentage.																						

2.1.3 Application-Level Scope Field Encryption

Any field containing data the agency deems sensitive or confidential must be encrypted. Agencies should avoid storing personally identifying information (PII) in any application-level scope field, whether the field is encrypted or not.

2.1.4 Application-Level Scope Field Help Text

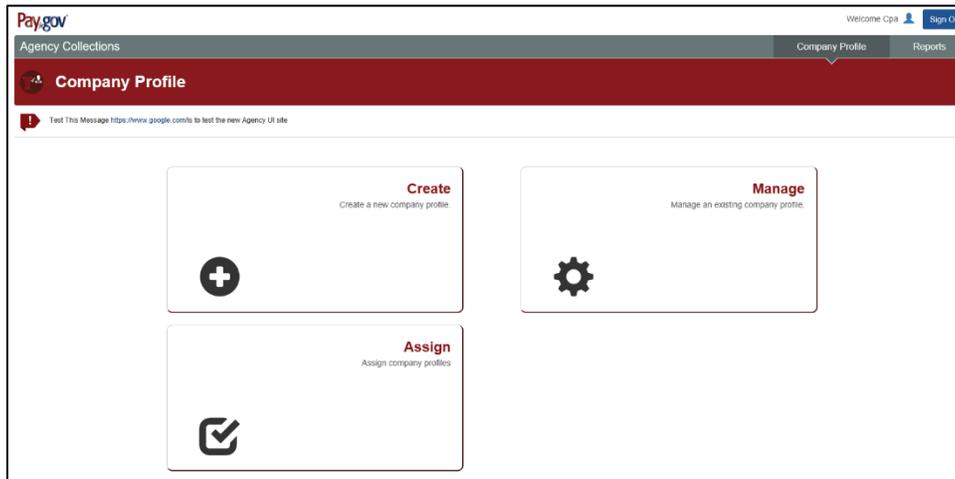
Help text to assist company profile administrators when creating company profiles may be specified as part of the application setup and will be recorded in the ACT. This text will be available to CPA users by clicking on a hyperlink next to the application-level scope field. The help text field is limited to 256 alphanumeric characters.

Note: If no help text is defined, users will receive a blank dialog box when they click the link.

3 Creating a Company Profile

1. Sign in to the MyAgency website.
2. On the Agency Collections page, click the Create Profile link.
3. Click the **Create** tile (Figure 1).

Figure 1: Example Agency Collections Company Profile page for the CPA role



4. Fill in the fields on the Create Company Profile page (Figure 2). Required information is marked with an asterisk (*).

Figure 2: Create Company Profile page

Create Company Profile

*Agency: SAT112

*Application: SAT112_Application_01

Active Company Profile

*Company ID:

*Company Name:

Address 1:

Address 2:

Country: United States

State: Select State

City:

Zip/Postal Code:

Phone:

Application-level Scope

Field	Value	Data Type	Encrypted	
Field_01	<input type="text"/>	String	N	Help

Save

Table 2: Create company profile fields

Company Profile Field	Description	Required/Optional
Agency	Select the agency from the dropdown if not already shown.	Required
Application	Select a cash flow application from the dropdown list.	Required
Active Company Profile	Check the box to mark the profile as active. You may leave this box unchecked if you wish and activate the profile at a later date.	Optional
Company ID	Enter an ID for the company. The ID must be unique within your application.	Required
Company Name	Enter a name for the company. The name must be unique within your application.	Required
Address 1	Enter the company's street address.	Optional

Company Profile Field	Description	Required/Optional
Address 2	Enter the second line of the company's street address, if needed.	Optional
Country	Select the country the company is located in.	Optional
State	Select the State or Province the company is located in. The dropdown list only appears for the U.S. and Canada.	Optional
City	Enter the name of the city the company is located in.	Optional
Zip/Postal Code	Enter the ZIPcode or postal code for the company's location.	Optional
Phone	Enter a telephone number for the company.	Optional
Application-level Scope Field	Appears only if scope fields are defined in the selected application's configuration. Pre-filled with the scope field name.	See section 2.1
Application-level Scope Value	Enter a value for the field.	
Application-level Scope Data Type	The data type specified in the application's configuration. Pre-filled.	
Application-level Scope Encrypted	Whether or not the value is to be encrypted (Y/N). Pre-filled from the application's configuration	

5. Click **Save**. A message at the top of the page will confirm the profile was created.

Note: The number of company profiles an application has will increase the size of any forms associated with the application. This is because the company profile data must be transmitted to the user along with the form. This could potentially cause poor performance for anyone accessing the form over a low-speed internet connection.

4 Managing Company Profiles

Managing allows you to search for a profile and then select the action you wish to perform on it.

1. Sign in to the MyAgency website.
2. On the Agency Collections page, click the Company Profile link.
3. Click the **Manage** tile (Figure 1).
4. Enter the search criteria for the profile.

Table 3: Company profile search criteria

Company Profile Field	Description	Required/Optional
Agency	Select an agency from the dropdown list.	Required
Application	Select a cash flow application from the dropdown list.	Optional
Company ID	Enter the ID for the company.	Required
Company Name	Enter the name for the company.	Required
Address 1	Enter the company's street address.	Optional
Address 2	Enter the second line of the company's street address, if needed.	Optional
Company Search Base	From the dropdown list, select whether you want to search for Active, Inactive, or both types of profiles.	Defaults to Both

5. Click **Search**.
6. Company profiles are listed below the search criteria form.

Figure 3: Company profile search results

Company Name contains:

Company Search Base:

Both Active and Inactive

[Search](#) [Reset](#)

Company Profiles

Select the Assign Users link to the right of the desired Company Profile, or click Edit to edit the Company Profile.

Application	Company ID	Company Name	Active	Actions
SAT112_Application_01	1234	1234	N	Assign Users Edit View
112 App Details - This form has Company Profile with encrypted string value	1234567890123456789	1234567890123456789	Y	Assign Users Edit View
112 App Details - This form has Company Profile with encrypted string value	ci201903201357	A\$CI-1 (p'a,c,p:cs@at_u s) 2 / # &	Y	Assign Users Edit View
112 App Details - This form has Company Profile with encrypted string value	ci201903251035	c	Y	Assign Users Edit View
SAT112_Application_01	ci	cn	Y	Assign Users Edit View
112 App Details - This form has Company Profile with encrypted string value	ci201903201055A0002	cn201903201055A0001	Y	Assign Users Edit View
112 App Details - This form has Company Profile with encrypted string value	ci201903201055A0001	cn201903201055A0001	Y	Assign Users Edit View
112 App Details - This form has Company Profile with encrypted string value	ci201903201114	cn201903201114	N	Assign Users Edit View
SAT112_Application_01	ci201903201230	cn201903201230	Y	Assign Users Edit View
112 App Details - This form has Company Profile with encrypted string value	A\$CI-1 (p'a,c,p:cs@at_u s) 2 / # &	cn201903201354	Y	Assign Users Edit View

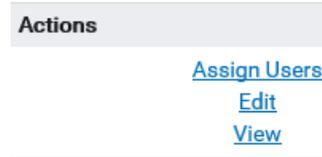
1 2 10

7. Select an Action for the company profile you wish to manage. Descriptions of the actions are in the following sections.

5 Editing Profile Information

1. Click the **Edit** action for the company profile you wish to manage.

Figure 4: Company Profile actions



2. Make any changes needed to the company profile and application-level scope fields (Figure 5). Remove the check mark next to “Active Company Profile” if you wish to deactivate the company profile.

Figure 5: Editing a company profile

Edit Company Profiles

Agency:

Application:

Active Company Profile

***Company ID:**

***Company Name:**

Address 1:

Address 2:

Country:

State:

City:

Zip/Postal Code:

Phone:

Application-level Scope

Field	Value	Data Type	Encrypted	
Field_01	<input type="text" value="test"/>	String	N	Help

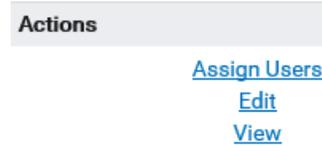
3. Click **Save**.

6 Assigning Users to Company Profiles

Note: You can also click the Assign tile (section 7) to assign users to company profiles.

1. On the Manage Company Profiles Search Results page, click the **Assign Users** action.

Figure 6: Company Profile actions



2. Select the desired agency from the drop-down list.

Figure 7: Assign Users page

Assign Users

Search Criteria:
Enter criteria to search and view users

Search Help: If All Agencies is selected, a value must be supplied for one of the following fields: Username begins with, Last Name begins with, or Email Address contains. If a value is supplied for Email Address contains, a value must be supplied for one of the following fields: Agency (A value other than All Agencies), Username begins with or Last Name begins with.

Agency:

Username begins with:

Last Name begins with:

Email Address contains:

3. Enter any other criteria needed for the search,

Table 4: Assign Users search criteria

Field	Description	Required/Optional
Agency	Select your agency from the dropdown list.	Required
Username	Enter at least the first letter of the customer's username.	Optional
Last Name	Enter at least the first letter of the customer's last name.	Optional

Field	Description	Required/Optional
Email Address	Enter any part of the customer's email address.	Optional

- Click **Search** to bring up a list of available company profiles (Figure 8). The list is displayed after the search form.

Figure 8: User search results

User Summary
 Select the Assign Companies link to the right of the desired user to assign Company Profiles to that user.

Your search returned 4269 results. The first 1000 are shown below:

Name ↕	Username ↕	Agency ↕	Actions
112, Aaa	Aaa112	SAT112	Assign Companies
112, Acs	Acs112	SAT112	Assign Companies
112, Aff	Aff112	SAT112	Assign Companies
112, Aff	Aff1120	SAT112	Assign Companies
112, Bag	Bag112	SAT112	Assign Companies
112, Big	Big112	SAT112	Assign Companies
112, Coe	Coe112	SAT112	Assign Companies
112, coe	Coe1125	SAT112	Assign Companies
112, Cos	112Cos	SAT112	Assign Companies
112, Cos	Cos1122	SAT112	Assign Companies

Navigation: 1 2 3 4 5 10

- Click the Assign Companies action for the user you wish to assign to bring up the Assign Company Profiles to User search page (Figure 9).

Figure 9: Assign Company Profiles to User page

Assign Company Profiles to User

Selected User:

Selected Username:

Search Criteria:
 Enter criteria to search and view Company Profiles to assign to the above user

***Agency:**

Application:

Company ID:

Company Name contains:

Company Search Base:

6. Select an agency and application.
7. Select or enter any other search criteria for the user.

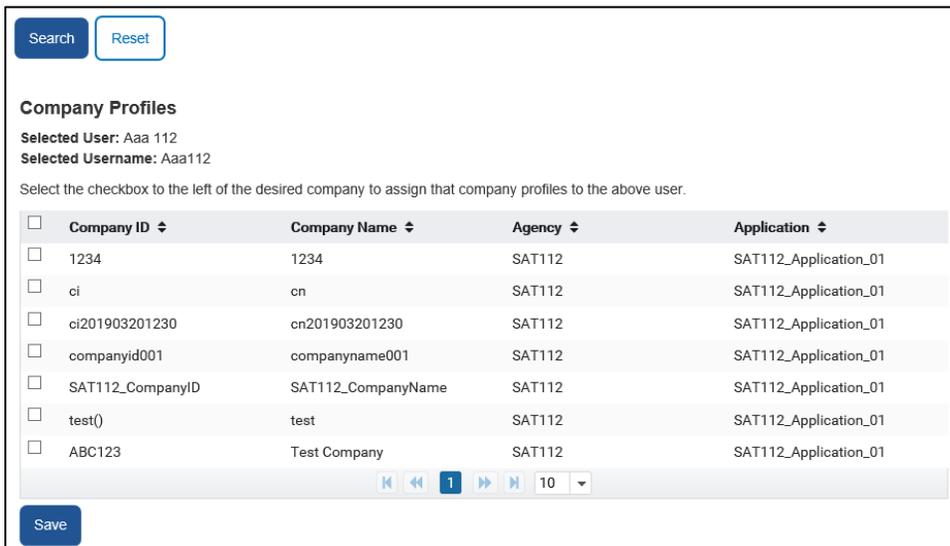
Table 5: Assign Users search criteria

Field	Description	Required/Optional
Selected User	Pre-filled. Cannot be changed	Required
Selected Username	Pre-filled. Cannot be changed.	Required
Agency	Select an agency from the dropdown list.	Required
Application	Select an application from the dropdown list. Listed application depend on the agency selected.	Optional
Company ID	Enter the company ID in a profile	Optional
Company Name	Enter any part of the company's name.	Optional

Field	Description	Required/Optional
Company Search Base	Select what to include in the search: <ul style="list-style-type: none"> Exclude Company Profiles assigned to this user (default) Show all Company Profiles Include only those Company Profiles assigned to this user 	Required

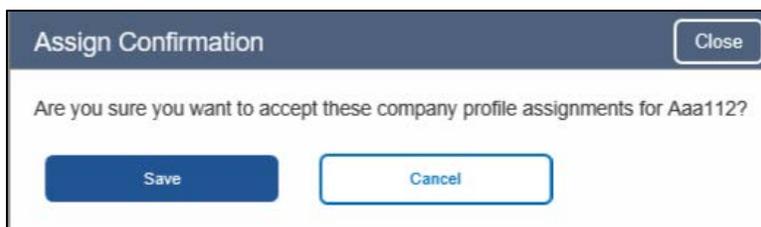
- Click **Search**.
- A list of Company Profiles that can be assigned is displayed below the search form.

Figure 10: Company Profiles list



- Check the box next to the profile or profiles you wish to assign to the user. You can select as many profiles as needed. Checking the box next to “Company ID” selects all the profiles in the results.
- Click **Save** to assign the selected profile or profiles to the user.
- Click **Save** on the popup dialog box to confirm the assignment (Figure 11).

Figure 11: Confirming the company profile assignment



13. A message at the top of the page will confirm that the company profile assignment was completed successfully.

7 Assigning Company Profiles to Users

1. Sign in to the MyAgency website.
2. On the Agency Collections page, click the Company Profile link.
3. Click the **Assign** tile.
4. Search for the Company Profile. See section 4.
5. Click the Assign Users action for the profile desired.
6. Search for the user. See section 6, and follow the instruction starting at step 5.
7. When finished, you will receive a message confirming that the user assignment was completed successfully.

8 Removing User Assignment to Company Profiles

You cannot remove a user's assignment to company profiles through the Company Profile function, instead you must modify their user role to remove them from the role that gives access to company profiles.

See the *Agency Guide to Access Control* for instructions.

9 Viewing a Company Profile

1. Click the **Manage** tile.
2. Search for the Company Profile. See section 4.
3. Click the **View** action for the desired profile.

Figure 12: Viewing a Company Profile

View Company Profiles

Agency:
SAT112

Application:
SAT112_Application_01

Active Company Profile

***Company ID:**
1234

***Company Name:**
1234

Address 1:
Test

Address 2:

Country:
United States

State:
Ohio

City:
Cleveland

Zip/Postal Code:
44114

Phone:
2156667777

Application-level Scope

Field	Value	Data Type	Encrypted	
Field_01	test	String	N	Help

[Return to Search Results](#)

4. The View Company Profiles page shows the details for the profile. You cannot change any of the information.

10 Company Profile Reports

Two online reports related to company profiles are available to authorized users through the Reporting Service:

- **Company Profile User Access** allows you to view a list of users assigned to each company profile.
- **Company Profile Values** allows you to view profile data and the values assigned for up to three application-level scope fields for a single application. Values for encrypted fields will be displayed as a row of asterisks (*****).

Authorized users may access these reports at <https://www.pay.gov/myagency/>.

See the *Agency Guide to the Reporting Service* for information and instructions.

11 Customer Support

Customer service for Pay.gov is provided by the Federal Reserve Bank of Cleveland. Agency customers can receive assistance with Pay.gov access, web site navigation, hosted forms processing, bill processing, and credit card and ACH collections. 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.

11.1 Contact Information

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

Monday through Friday, Closed Bank Holidays

Phone: (800) 624-1373

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