



# Agency Guide to Company Profiles

---

January 15, 2024



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

© Copyright 2024 Federal Reserve Bank of Cleveland

*Pay.gov® is a registered trademark of the United States Department of the Treasury,  
Bureau of the Fiscal Service*

## Revision History

Date	Author	Description
April 1, 2019	Walter Rowinsky FRB Cleveland	Initial version
July 1, 2019	Walter Rowinsky FRB Cleveland	Updated for Pay.gov 7.9 (changed title; updated website URLs).
May 4, 2023	Walter Rowinsky FRB Cleveland	Added new section 6.
August 21, 2023	Walter Rowinsky FRB Cleveland	Reviewed for Pay.gov 8.3 (updated section 6).
January 15, 2024	Walter Rowinsky FRB Cleveland	Updated for Pay.gov 8.4 (added new section 10).



## Table of Contents

Revision History .....	iii
<b>1 Introduction .....</b>	<b>1</b>
1.1 Related Documents .....	1
<b>2 Defining Company Profiles.....</b>	<b>3</b>
2.1 Defining Company Profile Options .....	3
<b>3 Creating a Company Profile .....</b>	<b>5</b>
<b>4 Managing Company Profiles.....</b>	<b>9</b>
<b>5 Editing Profile Information .....</b>	<b>11</b>
<b>6 Scheduling a Price Change.....</b>	<b>13</b>
<b>7 Assigning Users to Company Profiles.....</b>	<b>15</b>
<b>8 Assigning Company Profiles to Users.....</b>	<b>21</b>
<b>9 Removing User Assignment to Company Profiles.....</b>	<b>23</b>
<b>10 Updating Company Profiles.....</b>	<b>25</b>
<b>11 Viewing a Company Profile.....</b>	<b>27</b>
<b>12 Updating Company Profiles.....</b>	<b>29</b>
<b>13 Company Profile Reports.....</b>	<b>31</b>
<b>14 Customer Support .....</b>	<b>33</b>
14.1 Contact Information.....	33



# 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**

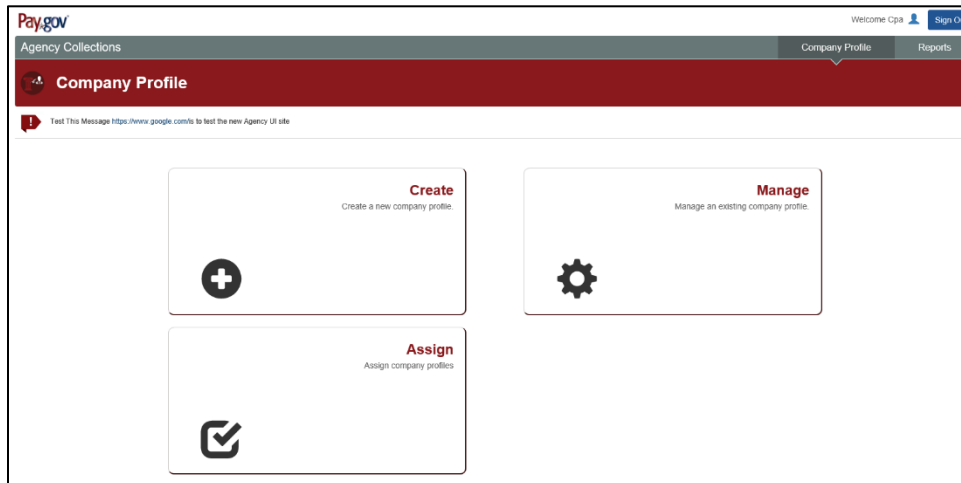
Help text to assist company profile administrators when creating company profiles may be specified as part of the application setup and will be recorded in the ACT. This text will be available to CPA users by clicking on a hyperlink next to the application-level scope field. The help text field is limited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

**\*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"/>	String	N <a href="#">Help</a>

Table 2: Create company profile fields

Company Profile Field	Description	Required/Optional
<b>Agency</b>	Select the agency from the dropdown if not already shown.	Required
<b>Application</b>	Select a cash flow application from the dropdown list.	Required
<b>Active Company Profile</b>	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
<b>Company ID</b>	Enter an ID for the company. The ID must be unique within your application.	Required
<b>Company Name</b>	Enter a name for the company. The name must be unique within your application.	Required
<b>Address 1</b>	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 ZIP code 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.

**Note:** Only agency users with the CPA role can manage and edit company profiles.

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
<b>Agency</b>	Select an agency from the dropdown list.	Required
<b>Application</b>	Select a cash flow application from the dropdown list.	Optional
<b>Company ID</b>	Enter the ID for the company.	Required
<b>Company Name</b>	Enter the name for the company.	Required
<b>Address 1</b>	Enter the company's street address.	Optional
<b>Address 2</b>	Enter the second line of the company's street address, if needed.	Optional
<b>Company Search Base</b>	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	<a href="#">Assign Users</a> <a href="#">Edit</a> <a href="#">View</a>
112 App Details - This form has Company Profile with encrypted string value	1234567890123456789	1234567890123456789	Y	<a href="#">Assign Users</a> <a href="#">Edit</a> <a href="#">View</a>
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	<a href="#">Assign Users</a> <a href="#">Edit</a> <a href="#">View</a>
112 App Details - This form has Company Profile with encrypted string value	ci201903251035	c	Y	<a href="#">Assign Users</a> <a href="#">Edit</a> <a href="#">View</a>
SAT112_Application_01	ci	cn	Y	<a href="#">Assign Users</a> <a href="#">Edit</a> <a href="#">View</a>
112 App Details - This form has Company Profile with encrypted string value	ci201903201055A0002	cn201903201055A0001	Y	<a href="#">Assign Users</a> <a href="#">Edit</a> <a href="#">View</a>
112 App Details - This form has Company Profile with encrypted string value	ci201903201055A0001	cn201903201055A0001	Y	<a href="#">Assign Users</a> <a href="#">Edit</a> <a href="#">View</a>
112 App Details - This form has Company Profile with encrypted string value	ci201903201114	cn201903201114	N	<a href="#">Assign Users</a> <a href="#">Edit</a> <a href="#">View</a>
SAT112_Application_01	ci201903201230	cn201903201230	Y	<a href="#">Assign Users</a> <a href="#">Edit</a> <a href="#">View</a>
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	<a href="#">Assign Users</a> <a href="#">Edit</a> <a href="#">View</a>

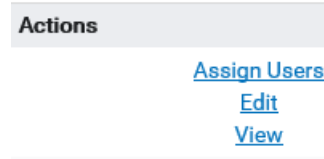
1 2 10

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:**  
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	<a href="#">Help</a>

3. Click **Save**.



## 6 Scheduling a Price Change

**Important!** Only company profiles that have the company label set up as a currency datatype can schedule a price change. If this is allowed you will see the Schedule Price Change button on the Edit page.  
If the Edit page does not show the button you can contact Pay.gov Customer Support to request that the profile datatype be changed to currency.

You must have the CPA role to manage/edit company profiles, including scheduling a price change. If no agency user with the CPA role for the cash flow application is available, contact Pay.gov Customer Support to have the profile edited and to schedule the price change.

To schedule a price change:


1. Sign in to the Agency Collections (myagency) website.
2. Click the **Company Profile** tile.
3. Select the Agency and Application.
4. Click **Search**.
5. The search results display all the company profiles for the application.
6. Click the **Edit** action for the profile you want to schedule the price change for.
7. The Edit page opens.

The screenshot shows the 'Edit Company Profiles' page. On the left, there is a sidebar with 'Manage Company Profiles' and 'Assign Users'. The main content area is titled 'Edit Company Profiles' and contains two sections: 'Company Profile Information' and 'Company Profile Address'. The 'Company Profile Information' section has the following fields: Agency (optional) with 'USDAAPHIS', Application (optional) with 'APHIS Agricultural Quarantine Inspect', a checked 'Active Company Profile' checkbox, Company ID with '9/30/22', and Company Name with 'AQI'. The 'Company Profile Address' section has the following fields: Address 1 (optional), Address 2 (optional), Country (optional) with 'United States', State (optional) with 'Select State', City (optional), Zip/Postal Code (optional), and Phone (optional). At the bottom of the form is a blue button labeled 'Schedule Price Change'.

8. Click the **Schedule Price Change** button at the bottom of the page.
9. The Pricing Update page opens.

Pricing Update
Close

Update Pricing on  
Pricing will update at midnight on selected date

mm/dd/yyyy 

Field Label	Current Value	Update Value to
<input style="width: 100%;" type="text" value="Passenger Fee"/>	<input style="width: 100%;" type="text" value="\$213"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text" value="Aircraft Clearance Fee"/>	<input style="width: 100%;" type="text" value="\$1.75"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text" value="Cruise Line Fee"/>	<input style="width: 100%;" type="text" value="\$3.96"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text" value="Treatment Fee"/>	<input style="width: 100%;" type="text" value="\$225.00"/>	<input style="width: 100%;" type="text"/>

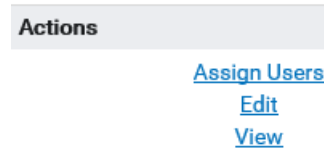
10. From the **Calendar icon**, select the date when the price change should occur.
11. Enter the updated price in the correct Update Value to field.
12. Click **Continue**.

## 7 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

**Valid eMail Characters**

Valid characters have been expanded to allow the following special characters:

#	?
\$	^
&	_
'	`
*	{
+	
-	}
/	~
=	

4. 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	<a href="#">Assign Companies</a>
112, Acs	Acs112	SAT112	<a href="#">Assign Companies</a>
112, Aff	Aff112	SAT112	<a href="#">Assign Companies</a>
112, Aff	Aff1120	SAT112	<a href="#">Assign Companies</a>
112, Bag	Bag112	SAT112	<a href="#">Assign Companies</a>
112, Big	Big112	SAT112	<a href="#">Assign Companies</a>
112, Coe	Coe112	SAT112	<a href="#">Assign Companies</a>
112, coe	Coe1125	SAT112	<a href="#">Assign Companies</a>
112, Cos	112Cos	SAT112	<a href="#">Assign Companies</a>
112, Cos	Cos1122	SAT112	<a href="#">Assign Companies</a>

5. 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.

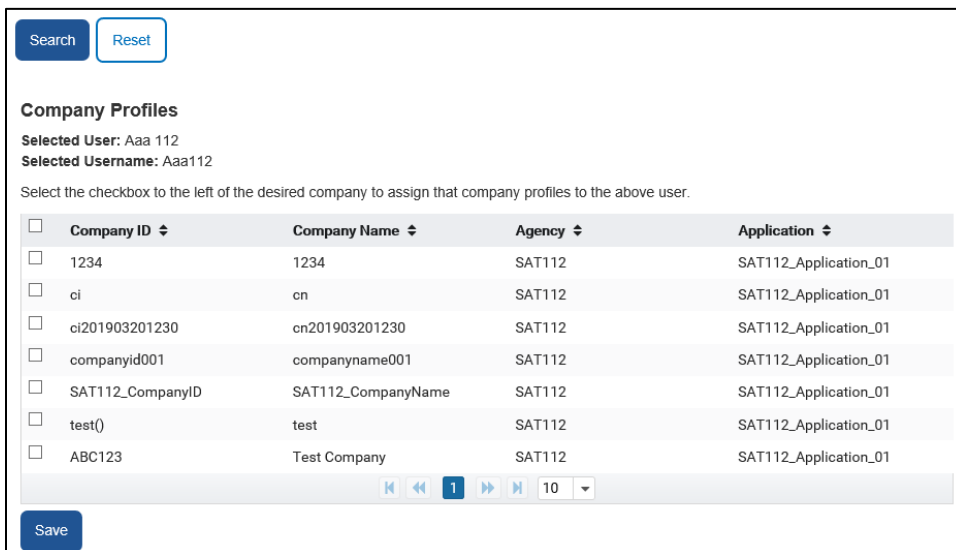
Table 5: Assign Users search criteria

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

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

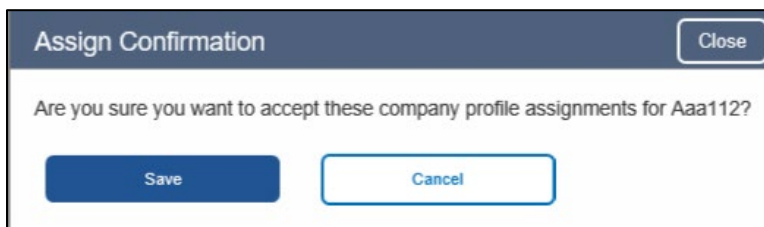
- Click **Search**.
- A list of Company Profiles that can be assigned is displayed below the search form.

**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.



## 8 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.



## **9 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.



## **10 Updating Company Profiles**

CPA users can only make changes at the Application Level for Company Profiles.

See section 3 for an explanation of the profile fields.



## 11 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.



## **12 Updating Company Profiles**

CPA users can only make the changes at the Application Level for Company Profiles.



## 13 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.



## 14 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.

### 14.1 Contact Information

Hours: 8:00 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](mailto:pay.gov.clev@clev.frb.org)