New User Self Enrollment

The term “new user” refers to an individual who does not currently have an identity (Single Sign On or SSO - user ID and password) established to access Treasury applications via the UPS or ISIM provisioning services.

***If you already have an SSO account with which you access other Treasury applications via UPS or ISIM, proceed to the User Account Request section of this guide.

To create an identity (Single Sign On user ID and password), access the Fiscal Service Self-Enrollment page at https://isim.fiscal.treasury.gov/selfenroll/register

1. A security notification will display. Review the information and click I Agree to continue.
2. Enter the self-enrollment information. Fields with (*) are required.

Click the Search button next to Organization. A separate browser window will open. Enter your Entity name. Click the Search button. The Search results will display. Click the radial button next to your Entity, Click Add, then Done. Close the separate browser window if necessary.

Type the text from the Captcha image into the box and click Submit.
3. A confirmation message will display the identity was established successfully, click Close Window button.

   Success!
   Your request submitted successfully. You should receive an email shortly with your credentials.
   Close Window

4. Two emails will be received. One email will contain the Single Sign On (SSO) userID, the other will contain a temporary password.
   (The auto-generated emails are marked from donotreply@fiscal.treasury.gov or donotreply@fms.treas.gov. Some email systems may deliver the emails to junk or spam folders.)

5. Log into ISIM https://isim.fiscal.treasury.gov/itim/self enter the User ID and temporary password received in the emails and click LOGIN.
6. A prompt to change the temporary password will be displayed. Retype the User ID and temporary password in the corresponding fields. Create a New Password using the displayed criteria and retype in the Confirm New Password fields. After completing, click the Change Password button.

7. A prompt will be displayed to establish 3 security questions and a shared secret to use in the self-service portal for forgot password resets. Choose only 3 security questions and provide answers.
8. Enter information in the **Shared Secret** field (at least three characters) and re-enter it in the **Confirm Shared Secret** field. Click the **Save My Shared Secret** button when completed.

Your Shared Secret is used by the Help Desk personnel to verify your identity when you call them. At that time, you need to provide that the shared secret is at least 3 characters long and then click Save My Shared Secret button.

<table>
<thead>
<tr>
<th>Shared Secret</th>
<th>Confirm Shared Secret</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click the **Save My Shared Secret** button when completed.

9. Click the **Logout** button.

**Note:** You must wait 15 minutes before using your User ID and password to log into ITIM to request access to TCIS.

**User Account Request**

1. The Self-Service home page will load. To request access to CARS, click the **Request Account** link in the **My Access** section.

<table>
<thead>
<tr>
<th>My Access</th>
<th>Request Account</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="Image" alt="My Access" /></td>
<td>Request a new account.</td>
</tr>
</tbody>
</table>

2. When the **Request Account** page loads, enter “GTAS” in the **Search for:** field, and then click **Search**.
3. When the search results appear, click the **GTAS** link in the **Account Type** field.

**Request Account**

Enter information to search for the type of account you would like to request.

Search for:

GTAS  

**Search Results**

Click the account type that you would like to request.

<table>
<thead>
<tr>
<th>Account Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>GTAS</td>
</tr>
</tbody>
</table>

4. When the **Account Information** window appears, click the **Search** button next to the **GTAS Role** field.

When the **Search for GTAS Role** screen appears, select the appropriate role by clicking on it.

**Account Information**

Type the requested information below. When you are done specifying information, click Next. All required fields are marked with (*).

- **User ID**
  
isn’t 0

- **GTAS Role**

- **Access Group**

Enter Agency Name, Department, FR Entity, or TAS

- **Supervisor**

**Search for GTAS Role**

**Search Results**

Click below to select from the search results.

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certifier Role</td>
</tr>
<tr>
<td>Executive Role</td>
</tr>
<tr>
<td>Preparer Role</td>
</tr>
</tbody>
</table>

Page 1 of 1  Total: 3  Displayed: 3

Back to Account
5. When the **Account Information** page loads, the selected role will be populated in the **GTAS Role** field. Enter information relevant to your access in the **Enter Entity Name, Department, FR Entity, or TAS** field.

6. Click the **Search** button next to the **Supervisor** field to assign the supervisor.
7. Type in the name of the desired supervisor, and then click **Search**.

**Search for Supervisor**
Enter information to search for a Supervisor.

Search by:
- Full name

Search for:

Search

[Back to Account]

8. When the GWA Supervisor’s name appears in the search results, click the link to select it.

*Note: If the correct supervisor name does not appear, you will need to have him/her submit a form in order to be added to ISIM as a GWA Supervisor.*

**Search for Supervisor**
Enter information to search for a Supervisor.

Search by:
- Full name

Search for:

Search

**Search Results**
Click below to select from the search results.

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amy Super</td>
</tr>
<tr>
<td>Page 1 of 1</td>
</tr>
<tr>
<td>Total: 1</td>
</tr>
<tr>
<td>Displayed: 1</td>
</tr>
</tbody>
</table>

[Back to Account]
9. The supervisor name will appear in the **Supervisor** field. Click **Next** to continue with the process.

10. Click **Request Account** to submit the request. When the **Request Submitted** confirmation page opens, the request ID assigned to the submitted request will appear. To view the status of the request, click the **View My Requests** link.
11. When the **View My Requests** page opens, the status of the request should initially be shown as “In Process.” To view the Request Detail, including the name of the supervisor who needs to approve the request, click the corresponding **Account Add** link in the **Request Type** column.

### View My Requests

Click the request type to view its information.

<table>
<thead>
<tr>
<th>Request Type</th>
<th>Date Submitted</th>
<th>Status</th>
<th>Account/Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Add</td>
<td>January 6, 2015 1:12:12 PM</td>
<td>In Process</td>
<td>Issued on GTAS</td>
</tr>
</tbody>
</table>

12. The request will remain in a status of “In Process” until it is approved, rejected, or the timeframe for action ends. It will change to “Success” after the request has been approved by both your supervisor and the Treasury Support Center. You will receive an email after the request has been approved or rejected.

**Note:** This process can take up to 14 days: your supervisor has seven days to approve the request, after which the Treasury Support Center has another seven days to complete its approval. **If your GWA supervisor does not approve the request within the seven-day timeframe designated for GWA supervisor approval, the request will fail, and you will need to resubmit it.**

### View My Requests

Click the request type to view its information.

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<td>Success</td>
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</tbody>
</table>

**Contact the Treasury Support Center at (877) 440-9476 or via email at GTAS@stls.frb.org**

*If you have questions concerning the GTAS enrollment process.*
Appendix A.

GTAS External Roles

GTAS is used by entities to report budget execution information and proprietary financial reporting information to the Department of the Treasury. Each user may have only one entity role.

Preparer
This is an entity role used to upload ATB data and review it for accuracy. Multiple users at each entity should be assigned this role, encouraging cross-verification and separation of duties. This role may also be used by service providers who act on behalf of one or more entities. Preparers must be assigned to an Access Group, granting them access to one or more entities' TAS’s or a subset of TAS’s. This role is for the users at the various entities who are responsible for all aspects of extracting data from their core accounting systems, loading trial balance data into GTAS, and reviewing the data for accuracy.

- Uploads bulk files
- Certifies ATB periods 2-11
- Enters year end manual adjustments
- Explains material differences periods 3, 6, 9 and 12

Certifier
This role is for external entity users who are responsible for certifying the trial balance data and material differences by TAS.

- Certifies ATB period 12
- Certifies year end manual adjustments
- Entity CFO or designee certifies material difference reporting periods 3, 6, 9 and 12

Executive
This role is for those users who are running reports only. Users will not have access to upload, update, or delete any data throughout the system. Any user at any entity may request access to this role.