

Veterans Benefits Administration
OFFICE OF FINANCIAL MANAGEMENT

“Delivering Excellence Daily”



Creating New Users

Job Aid

VA



U.S. Department
of Veterans Affairs
Veterans Benefits
Administration



- The Level 4 will input the account request into USBank Access Online: <https://access.usbank.com>
- US Bank Access Online “User Profiles” gives AOPCs the ability to:
 - setup new user IDs, for AOPCs, AOs and alternates and cardholders
- Log in to Access Online, select System Administration from your left-hand navigation bar, select “User Profiles,” “Setup a new user”
- Enter the user info and assign a hierarchy (station code assigned by US bank provided by A/OPC)



Request Status Queue
Active Work Queue
System

Administration

- User Profiles
- Create Point of Contact
- Edit Point of Contact
- Find Point of Contact

Account Administration
Event Driven Notification
Payment Plus
Transaction Management
Account Information
Reporting
Dashboard
Data Exchange
My Personal Information

Home
Email Center
Contact Us

User Profiles

User Setup and Search

To locate a specific user, enter full or partial information for one of the
You can also [Setup a new user.](#)

User ID:

User Last Name:

OR

User First Name:

Account Number:

OR

Search

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Government Services

User Profiles

Manage Login Information

Enter the user login information.

* = required

User Access Status:*

Active

User Type: Client User

Last Name:*

First Name:*

User ID:*(7 to 20 alpha-numeric characters)

Data Exchange Batch Script

Password:*

Confirm Password:*





All Groups

Select a group to view details.

- [CH VA PURCH CH TM\(Global\)](#)
- [PA VA AUDIT\(Global\)](#)
- [PA VA FLEET MGR\(Global\)](#)
- [PA VA FLEET PRIM AOPC\(Global\)](#)
- [PA VA FLEET PRIM AO TM\(Global\)](#)
- [PA VA PURCH ALT AOPC\(Global\)](#)
- [PA VA PURCH ALT AO TM\(Global\)](#)
- [PA VA PURCH PRIM AOPC\(Global\)](#)
- [PA VA PURCH PRIM AO TM\(Global\)](#)
- [PA VA TRAV ALT AOPC\(Global\)](#)
- [PA VA TRAV PRIM AOPC\(Global\)](#)

VA FEG Matrix

VA FEGs	User Type	Description
VA PURCH CH TM	(Pcard/Travel)	CARDHOLDER PCARD/TRAVEL
VA PURCH PRIM AO TM	PCARD AO	APPROVING OFFICALS PCARD
VA PURCH ALT AO TM	ALTERNATE AO	ALTERNATE AO PCARD
VA PURCH PRIM AOPC	AOPC PCARD	PRIMARY AOPC PCARD
VA PURCH ALT AOPC	ALTERNATE AOPC	ALTERNATE AOPC PCARD
VA TRAVL PRIM AOPC	AOPC TRAVEL	PRIMARY AOPC TRAVEL CARD
VA TRAVL ALT AOPC	ALTERNATE AOPC	ALTERNATE AOPC TRAVEL
VA FLEET PRIM AOPC	AOPC FLEET	ALTERNATE AND PRIMARY AOPC
VA FLEET MANAGER	FLEET MANAGER	FLEET MANAGER
VA FLEET PRIM AO	AO FLEET	APPROVING/ALT APPROVING OFFICIAL FLEET

The Next step is to add Processing and Reporting Hierarchy to the User ID

Hierarchies:

Processing Hierarchy:

3059	0485	12345
(Bank)	(Agent)	(Company)

Bank # - Product Line (3059 for all purchase cards)

Agent # - Administration (Purchase Cards) VBA: 0485 VR&E: 0482

Company # - Managing Account (A/OPC) / Same as Level 6, issued by US Bank



Reporting Hierarchy:

Numerically coded levels that range from Level 1 to 6 identify accounts. These combined levels represent the reporting hierarchy. To keep the numbering system consistent throughout VA, the levels are defined as follows:

Level 1	03600	Department of Veterans Affairs
Level 2	00002 (GOE) 00005 (Chapter 31)	Veterans Benefits Administration Veteran Readiness and Employment (VR&E)
Level 3	00001 – Northeast District 00002 – Southeast District 00003 – Continental District 00004 – Pacific District 00005 – All VR&E Accts. 00006 – All VBACO	VBA Districts, services and offices*
Level 4	00XXX	RO Number
Level 5	XXXXX	Reporting Level for Approving Official (Issued by U.S. Bank)
Level 6	XXXXX	Company Number (Issued by U.S. Bank)



Adding the Processing Hierarchy to the User ID

- Select “Company” from the Hierarchy Level drop-down box
- Type the 5-digit Company number in the “Company” text box provide
- Click on the button, “Select position”
- It should then appear on the right-hand side of the screen under “Selected Hierarchy position(s)”
- Click on the button, “Accept Hierarchy”
- Once completed, the system will return you to the “User Profile Summary” page

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How to Create a New Card Holder account: Job Aid

VA



U.S. Department
of Veterans Affairs
Veterans Benefits
Administration

- After the Profile is created, select “Account Administration”
- “Cardholder Account” and “Create New Cardholder Account”


Account Administration

Cardholder Accounts

- [Create New Cardholder Account](#)
Set up a new cardholder account by specifying the product, demographic information, account information, accounting codes and authorization limits.



1. Define Product Settings

Please provide your organization's Processing Hierarchy, beginning with Product selection. 
All fields required unless noted as *(optional)*.

Product (Bank)

Purchasing - 3059

Agent

0485

Company

18250

Division *(optional)*

Department *(optional)*

 [Search](#)

Assign this account to

An Individual



Enter Account information:

- Account Owner's Info
- Legal Information
- Account Detail
- Default Accounting Code
- Authorization Limits





IAMS Instructions

VA



U.S. Department
of Veterans Affairs

Veterans Benefits
Administration



Register for an iFAMS account in IAMS

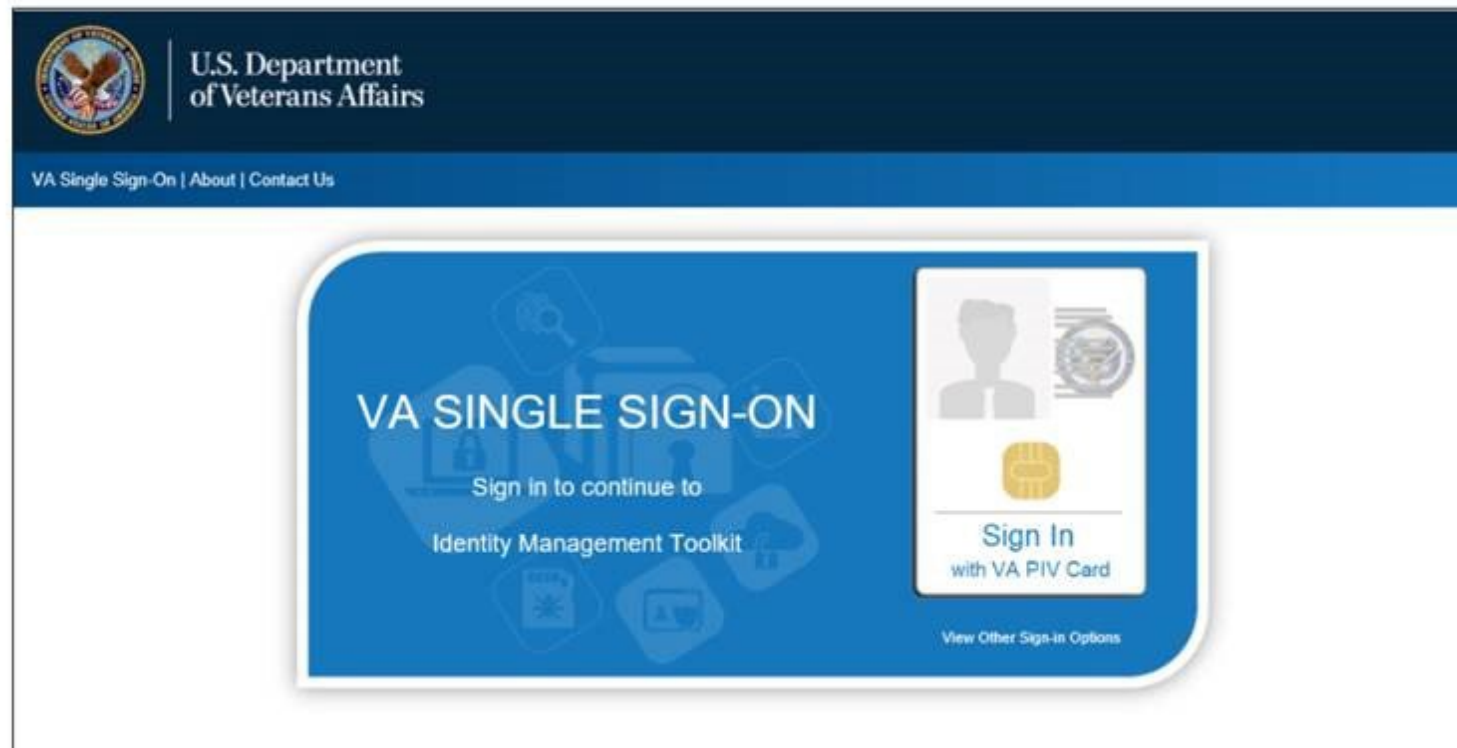
- Instructions are available: [iFAMS User Guides and Resources - Charge Card - All Documents](#) ([sharepoint.com](#))



Accessing IAMS

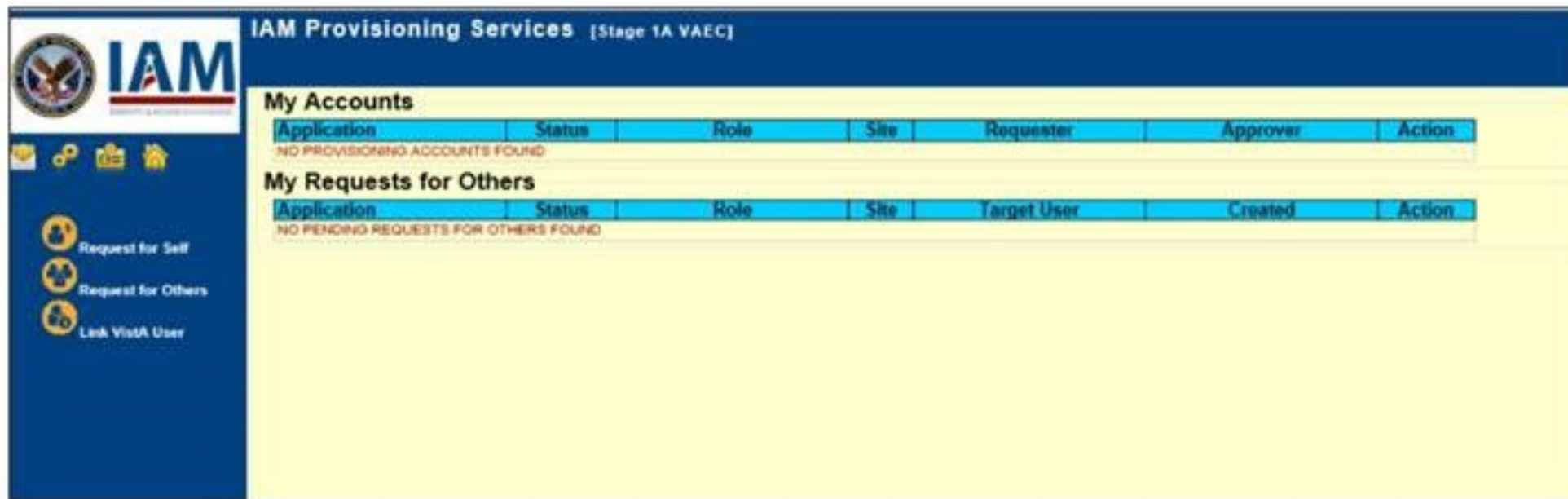
1. Request access through the IAMS application by clicking [HERE](#).

The SSOI screen displays.



- Enter your PIV pin number and click OK.

The IAMs home screen displays.



The screenshot shows the 'IAM Provisioning Services' interface. The header includes the 'IAM' logo and the text 'IAM Provisioning Services [Stage 1A VAEC]'. The main content area is divided into two sections: 'My Accounts' and 'My Requests for Others'. Both sections contain empty tables with headers and a message indicating no data was found.

My Accounts

Application	Status	Role	Site	Requester	Approver	Action
NO PROVISIONING ACCOUNTS FOUND						

My Requests for Others

Application	Status	Role	Site	Target User	Created	Action
NO PENDING REQUESTS FOR OTHERS FOUND						

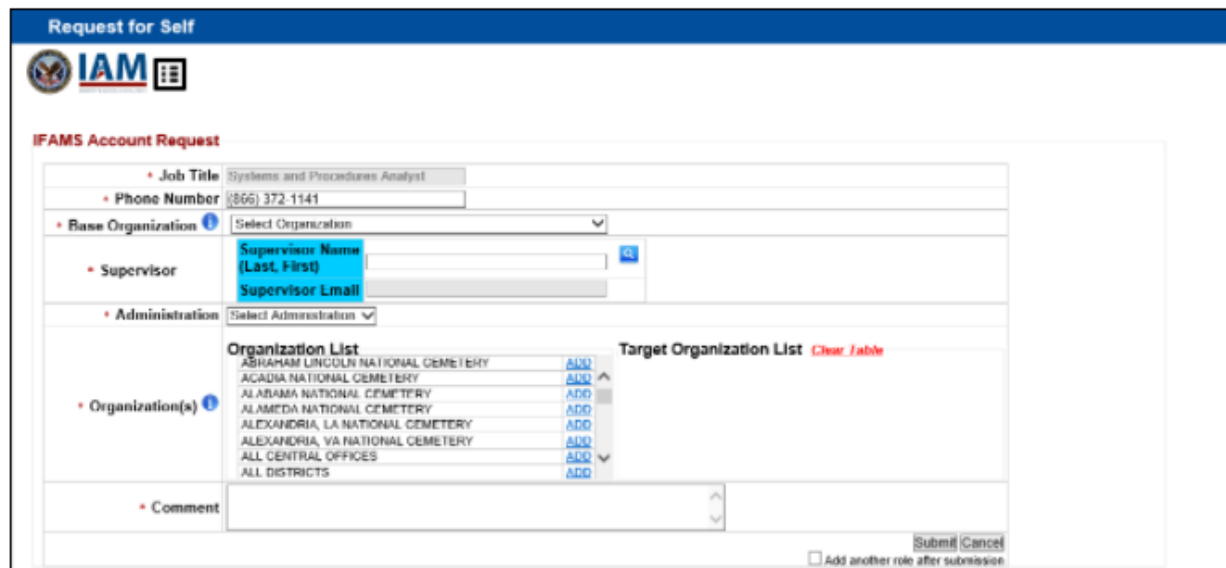
The left sidebar contains navigation icons and three menu items: 'Request for Self', 'Request for Others', and 'Link VisitA User'.

- Click Request for Self.

A Request for Self screen displays.

- Click iFAMS Account Setup.

An iFAMS Account Request form displays.



The screenshot shows the 'Request for Self' form in the iFAMS system. The form includes the following fields and sections:

- Job Title:** Systems and Procedures Analyst
- Phone Number:** (866) 372-1141
- Base Organization:** Select Organization (dropdown menu)
- Supervisor:** Supervisor Name (Last, First) and Supervisor Email (text fields)
- Administration:** Select Administration (dropdown menu)
- Organization(s):** A list of organizations with 'ADD' buttons next to each:

Organization List	Target Organization List
ABRAHAM LINCOLN NATIONAL CEMETERY	ADD
ACADIA NATIONAL CEMETERY	ADD
ALABAMA NATIONAL CEMETERY	ADD
ALAMEDA NATIONAL CEMETERY	ADD
ALEXANDRIA, LA NATIONAL CEMETERY	ADD
ALEXANDRIA, VA NATIONAL CEMETERY	ADD
ALL CENTRAL OFFICES	ADD
ALL DISTRICTS	ADD
- Comment:** Text area for additional information.
- Buttons:** Submit and Cancel.
- Checkbox:** Add another role after submission.

- 7. Enter all mandatory fields.

Note: Enter your Supervisor's name in the Supervisor Name field, then click the magnifying glass (search) icon. A directory search pulls up your supervisor's name from the Global Address List. Double-click your supervisor's name from the search results to auto fill the blanks for your supervisor.

- 8. Click Submit.

Note: If you have another role assigned to you that requires access, click the checkbox next to Add another role after submission. Fill the resulting form and Submit until all access requests are submitted.

Your access request is submitted. Once access is activated, continue to Logging into iFAMS.

Note: If you have difficulty with the IAMs application, go to the Customer Relationship Management (CRM portal). Enter the Self-Service portal (SSP) to create a case (you may have to change the application view to display SSP by selecting the dropdown next to your profile name in the upper right-hand corner of the screen). A customer support representative will contact you to solve your issue.