

## Points of contact

*When and how to use a point of contact form*

### **APCs (Agency Program Coordinators):**

*A new APC*

Step 1: Fill out the “Point of Contact Setup” form

- If APC is a level 3, do not fill out agent and company in first section
- Choose Primary or Alternate
- Fill in the levels (5-digits for each level)
- Fill in name and demographic info
- Sign, print and fill out remaining info of APC submitting the form
- Fax in request to the fax number on the form

Step 2: Submit an Access Online user ID request

- Click on “request type” and select “Add user” in the pop-up window
- Fill in USDA as the shortname, type in a user ID (a minimum of 7 characters), and select the **PAGC\_APC-LAPC** entitlement group
- Fill in remaining required fields (in red), as well as the processing and TBR hierarchies

### *Changing an existing APC*

Step 1: Fill out the “Point of Contact Maintenance” form

- If APC is a level 3, do not fill out agent and company in first section

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## Things to Keep in Mind

*Important details for filling out POC and user ID forms*

**Remember that the point of contact submitting a form must be at or above the level of the point of contact being setup or maintained**

### **Point of Contact Setup Form:**

- Ignore the second section under “Type of Contact” (A/OPC, TDO, EDI, etc.)
- Ignore the “Verification Identification” prompt

### **Point of Contact Maintenance Form:**

- Ignore the second section under “Type of Contact” (A/OPC, TDO, EDI, etc.)
- “Add this person” may be used to add an existing point of contact to a new or additional hierarchy level
- “Delete this person” may be used to delete a point of contact altogether
  - That said, you would not need to fill out any hierarchy levels for such a request
- “Change” may be used to replace one existing point of contact with another or to change someone from a primary to an alternate position. Also, if a person’s name or demographics have changed, this should be selected
- “Delete the current person under these levels” may be used to delete a point of contact from one level but not from another level
- Fill in “information to be changed” as it pertains to your request
- Ignore the “Verification Identification” prompt

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- Choose Primary or Alternate
- Select the “Action” taken that best fits your need (See details under “Things to Keep in Mind”)
- Fill in the levels (5-digits for each level) if you are adding this person to an additional hierarchy
- Fill in name and demographic info if you are replacing an APC or changing their name or demographic information
- Sign, print and fill out remaining info of APC submitting the form
- Fax in request to the fax number on the form

Step 2: Add or delete processing and TBR hierarchy to an existing user ID for this point of contact

- Ask the APC for his/her user ID or search for it by running a “System User List” report (under Administration) in Access Online
- Click on “request type” and select “Add processing hierarchy to existing user” from the pop-up window
- Fill in USDA as the shortname and type in the user ID
- This should fill in all fields with “existing” except for the processing hierarchy fields
- Fill in ONLY the processing hierarchy
- To “Add TBR hierarchy to an existing user ID” repeat the process by selecting the option in the pop-up window that appears after selecting “Request Type”, ONLY filling out the TBR hierarchy
- To “Delete processing” or “Delete TBR” from an existing user ID repeat the process by selecting the option in the pop-up window that appears after selecting “Request Type”

## LAPCs (Local/APCs):

### *A new LAPC*

Step 1: Fill out the “Point of Contact Setup” form

- See APC instructions

Step 2: Submit an Access Online user ID request

- See APC instructions

Step 3: Because the LAPC name appears on the managing account in Access Online, a third step should be completed

- If you are setting up an alternate LAPC, you do not need to complete Step 3
- If you are creating a new company level/level 5/managing account, this is completed via the form given out by the Account Coordinator group (e.g. Jennifer Dalhed)
- If a new LAPC is replacing an old one, the name should also be changed on the managing account
- Sign in to Access Online
- Go to “Account Administration”
- Select “Maintain Managing Account”
- Search for the MA account by LAPC name or company number
- Select “demographic information”
- Change the name and address

### *Changing an existing LAPC*

Step 1: Fill out the “Point of Contact Maintenance” form

- See APC instructions

Step 2: Add or delete processing and TBR hierarchy to an existing user ID for this point of contact

- See APC instructions

## THINGS TO KEEP IN MIND, CONT'D

### ACCESS ONLINE USER ID SETUP FORM

- Select the hyperlink “request type” to assist you with filling out the form
- Note: if a pop-up window does not appear, this is due to computer settings. Please get assistance from your IT to enable the pop-up window
- Red fields are required, but also include the processing or TBR hierarchy that you wish to add/delete
- Always include the bank number (3059, for purchase) when adding/deleting hierarchy or setting up a user ID
- “Enable” Approval Manager for all new purchase user IDs
- ONLY use the two entitlement groups for new user IDs (unless setting up reporting only/view only users)—for assistance, contact your AC
- Accounting Code View should be View 1
- Be mindful of your formatting/character limits listed on the form
  - Processing hierarchy character limits
    - Bank is always 3059
    - Agent is a 4-digit number
    - Company is a 5-digit number
    - Division is a 5-digit number
    - Department is a 4-digit number
  - TBR hierarchy character limits
    - Select “Yes” to add TBR
    - Bank is always 3059
    - TBR 1-7 are 5-digit numbers

**Email all user ID requests to [gov.service@usbank.com](mailto:gov.service@usbank.com)**

Step 3: Because the LAPC name appears on the managing account in Access Online, a third step should be completed

- If an LAPC is replacing an old one, the name should also be changed on the managing account
- Sign in to Access Online
- Go to “Account Administration”
- Select “Maintain Managing Account”
- Search for the MA account by LAPC name or company number
- Select “demographic information”
- Change the name and address

## AOs (Approving Officials):

*A new AO*

Step 1 is not used for AOs

Step 2: Submit an Access Online user ID request

- Click on “request type” and select “Add user” in the pop-up window
- Fill in USDA as the shortname, type in a user ID (a minimum of 7 characters), and select the **PAGC\_AO4** entitlement group
- Fill in remaining required fields (in red), as well as the processing and TBR hierarchies

*Changing an existing AO*

Step 1 is not used for AOs

Step 2: Add or delete processing and TBR hierarchy to an existing user ID for this point of contact

- See APC instructions

#### MORE INFORMATION

- You may find all of these forms on the URL:  
[www.usbank.com/usda](http://www.usbank.com/usda)
- Fax POC forms to the fax number listed on the form
- Email Access Online user ID requests to  
[gov.service@usbank.com](mailto:gov.service@usbank.com)
- Please allow 3-5 business days for a POC update
- Please allow 3-5 business days for a user ID request to be completed

*Feel free to contact us with questions.  
Your main point of contact is Jennifer Dalhed, Account Coordinator, at 1-800-254-9885, option 3, x31302*

Thank you, Your U.S. Bank team