



Treasury Check Information System (TCIS) Recertification Training

Agenda



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Introduction

Recertification:

- Is mandated by the Department of the Treasury, Bureau of the Fiscal Service security protocol
- Affects every user with access to the TCIS Application
- Is scheduled during the months of October and November

What is Recertification?

- A method of validating whether access to TCIS is still required
- Necessary to ensure appropriate level of access



Who Are the Recertifying Officials?

Recertifying Officials (RO)

- The RO is the person that has the authority to review access for all users that have them listed as TCIS supervisor in the application and determine if that access should be recertified or revoked.



What Happens Next?

You will receive a series of emails:

- **First Email (Announcement):**
Provides information on relevant dates and recertification roles.
This email is sent to all Recertifying Officials.
- **Second Email (Instructions):** Provides instructions on how to recertify users in the Shared Document with Secured Access (SDSA) tool.
- **Third Email (Link & Password):** Provides the link and the password to the SDSA tool.



Email Examples

From: TCIS_TSC@stls.frb.org
Subject: Annual TCIS Recertification

Once the recertification process begins, you will receive this email from noreply@stls.frb.org with a link and a temporary password:

Subject Line: Treasury Check Information System Recertification – Shared Document with Secured Access Password

Please click on the link below to access SDSA and sign in using the User ID provided in a previous email.

Temporary Password: <password>

<[CLICK URL LINK HERE](#)>

When to Contact TSC?

If you are no longer the recertifying official for the agency, notify the Treasury Support Center (TSC) immediately.

Treasury Support Center:
855-838-0743

TCIS_TSC@stls.frb.org

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SDSA Tool Overview

Shared Document with Secured
Access (SDSA)

User ID

Password

Warning!

This is an official United States Government System, which may be used only for authorized purposes. Unauthorized use or modification of any information stored on this system may result in criminal prosecution. The Government may monitor and audit the usage of the system, and all persons are hereby notified that the use of this system constitutes consent to such monitoring and auditing. Unauthorized attempts to upload information or change information on this service are strictly prohibited and may be punishable under the Computer Fraud and Abuse Act of 1986 and the National Information Infrastructure Protection Act.

- Recertification Officials will be sent an email from noreply@stls.frb.org on the day recertification opens. It will contain a temporary password and a link to the SDSA tool.
- They will need to use the temporary password provided. Once logged in with the temporary password the RO will be redirected to a page to change their password.

SDSA Tool Overview

SDSA Shared Document
with Secured Access

[Toggle Menu](#)

Change Password

Your password must contain the following: at least 8 characters, an uppercase letter, a lowercase letter, a number, and more than one special character (e.g., @, #, \$, !)

Your password must also not be a duplicate of your last 3 passwords.

After changing your password, you will be redirected to log on with your new password.

Original Password

New Password

Confirm New Password

Once the new password is entered and they hit Save, as a new security measure, they will be redirected to the log on page to log in with this new password. This will be the password they use for accessing SDSA for the rest of the recertification period, unless they need another password reset during the period.

There are a few Password restrictions that I would like to point out:

- At least 8 characters
- At least one uppercase
- At least one lowercase
- At least one number
- At least two special characters

SDSA Tool Overview

SDSA Shared Document with Secured Access

Home
Recertification
Certify Users
Change Password
Logout

[Toggle Menu](#)

TCIS Modify	
Recertification Period Begins	Oct 8, 2020
Recertification Period Ends	Nov 13, 2020
Recertification Period Extends	
TCIS Phone Number	(855) 838-0743
TCIS Contact Email	TCIS_TSC@stls.frb.org

After the password is changed, they will be directed to the home page. Any applications that are live in SDSA will appear on the home page showing the dates for recertification begin and end along with contact information for questions.

If they want to change their password at any time on their own, they can click the Change Password link.

From this page, they should click on the Certify Users link in the left navigation pane.

SDSA Tool Overview

SDSA Shared Document with Secured Access

Home
Recertification
Certify Users
Change Password
Logout

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Certify Users

Search for a user [Instructions](#)

Application *
Select Application
Select Application
TCIS-DEMO

Number of Users
100

Last Name
Enter Last Name

Status
Select Status

Search [Reset Search](#)

**required field*

On the Certify Users page, you will need to select TCIS from the application drop down.

You will now need to click on the SEARCH button

Recertifying Individual Users

Name ↑↓	User ID ↑↓	Email Address ↑↓	Phone Number ↑↓	Recertification Group # ↑	Role	Status
Test User1	TESTUSER1	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	Recertify
test user10	testuser10	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	Revoke
test user11	testuser11	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	No Action Ta
test user12	testuser12	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	Recertify
test user13	testuser13	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	No Action Ta
test user14	testuser14	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	No Action Ta
test user15	testuser15	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	No Action Ta
test user16	testuser16	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	No Action Ta
test user17	testuser17	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	No Action Ta
test user18	testuser18	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	No Action Ta
Test User2	TESTUSER2	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	No Action Ta

Showing 1 to 18 of 18 entries << < 1 > >>

Save Save & Confirm Cancel

Once the list of the users appear, action can be taken by selecting the drop down to the right of the page. The default selection shows No Action Taken. You can choose Recertify or Revoke.

Use the Save Page button to help you save your changes as you go. It is recommended that you click the Save Page button before moving to a new page. While your changes will still be retained when you go to a different page, there is a risk that you will lose those actions if you click Cancel or time out before clicking either Save Page or Save and Confirm. After selecting Save Page, you can continue to take action on more users, or close the session and continue at another time. You can log into the SDSA tool at any time during the recertification window to resume taking action on the remaining users.

You can have multiple pages of users to review based on the size of your agency's user base. If you have multiple pages, it is suggested that you click the Save Page button before you move to the next page. We also suggest that you refrain from using the scroll feature on your mouse as that can possibly change an action you selected without you knowing.

Recertifying Individual Users

Certify Users

[Instructions](#)

Search for a user

Application *

Number of Users

User ID

Last Name

Status

[Reset Search](#)

**required field*

Name ↑↓	User ID ↑↓	Email Address ↑↓	Phone Number ↑↓	Recertification Group # ↑↓	Role	Status
Test User1	TESTUSER1	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	<input type="button" value="Recertify"/>
test user10	testuser10	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	<input type="button" value="Revoke"/>
test user11	testuser11	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	<input type="button" value="No Action Ta"/>
test user12	testuser12	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	<input type="button" value="Recertify"/>
test user13	testuser13	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	<input type="button" value="No Action Ta"/>
test user14	testuser14	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	<input type="button" value="No Action Ta"/>
test user15	testuser15	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	<input type="button" value="No Action Ta"/>
test user16	testuser16	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	<input type="button" value="No Action Ta"/>
test user17	testuser17	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	<input type="button" value="No Action Ta"/>
test user18	testuser18	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	<input type="button" value="No Action Ta"/>
Test User2	TESTUSER2	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	<input type="button" value="No Action Ta"/>

Showing 1 to 18 of 18 entries << < 1 > >>

Once you have taken action on all your users and you wish to complete your session, click the Save & Confirm button and you will be directed to a confirmation page shown on the next slide.

Recertifying Individual Users

Certify Users View

User ID: ROUSER Application: TCIS-DEMO [Export to Excel](#)

Name ↑↓	User ID ↑↓	Email Address ↑↓	Phone Number ↑↓	Group ↑	Role	Status
Test User1	TESTUSER1	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	Recertified
test user10	testuser10	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	Revoked
test user11	testuser11	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	No Action Taken
test user12	testuser12	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	Recertified
test user13	testuser13	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE A	No Action Taken
test user14	testuser14	test@test.com	123-456-7890	82826511	TCIS - SSA USER ROLE B	No Action Taken

The confirmation page looks similar to the action page, but you will notice that dropdown is not longer available and you can click through the pages to see all users under your responsibility.

You also have the option on this page to export to Excel so you can have a record of your actions or it may be easier to view all your users in an excel format to review their access.

If you are done using the application, you will just click the Logout link on the left navigation. If you want to go back to take further action, you can click the Certify Users to get back to the actionable page. Clicking the Home button at the bottom of the screen will take you back to the Home page.

Any users in a revoked or no action status when the system closes, will have their TCIS access removed. Users that are revoked by the RO or had no action taken will need to re-enroll to obtain access again.

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Frequently Asked Questions

- I updated ISIM with my new supervisor information but don't see the updates in SDSA?
 - Any supervisor changes during the recertification process need to be relayed to the TSC so proper updates can be made to the SDSA tool.
- I just got an email from ISIM saying my account was removed but my RO recertified me?
 - If the user has not logged in for 1 year, they are removed by the system which is a separate process from recertification.
- I just got a new team member, and I don't see them listed to recertify?
 - Any user that was established after the data for recertification was pulled is not included in this year's recertification



Frequently Asked Questions (cont.)

- I approved the supervisor change in ISIM shouldn't they be recertified?
 - ISIM and SDSA do not communicate with each other. Action needs to be taken in each system.
- I log into SDSA and the list of users is from my old unit and I do not see my current users.
 - The user from the old and new units needs to update the supervisor information in ISIM. Please contact the TSC to advise them of the change.
- Do you have any training materials?
 - You can find step by step instructions on how to use SDSA on the Bureau of Fiscal Service Website here:
<https://fiscal.treasury.gov/tcis/training.html>



TCIS Contact Information



TCIS Support Center
1-855-838-0748
TCIS_TSC@stls.frb.org

<https://TCIS.fiscal.treasury.gov>