

# ePAY User Account Request Procedure

The most current version of this document can be found at  
<http://adminsvcs.cas.psu.edu/ListDocuments.asp?CategoryID=8>

**All the links referenced on this document are grouped together for your convenience at the website address listed above.**

**This procedure is to serve as a guide for requesting new access, change in access or deletion of access to ePAY for an individual user. It is recommended that you contact Craig Story ( [CStory@psu.edu](mailto:CStory@psu.edu) ), at the Office of Administrative Services, for a consult prior to beginning this process.**

1. Notify Administrative Services regarding the need to access ePAY
  - a. Notify Craig Story in Administrative Services, [CStory@psu.edu](mailto:CStory@psu.edu), that access is needed to ePAY. Please provide detailed user information regarding the request.
  - b. Craig Story will initiate a ticket in Footprints to track the process with Ag IT.
  - c. Craig Story and Ag IT staff will determine the scope of the request (current vs. new ePAY site, secure network in place, etc)
  - d. Consult with user on secure token requirements.
  
2. Submit request for user access to ePAY and verify/obtain Secure Token
  - a. Obtain an ePAY User Account Request Form from our website.
  - b. Send the completed form to Craig Story, 220 Ag Admin, University Park, PA 16802.
  - c. If your office does not have a Penn State Security Token or needs to obtain an additional Security Token (also known as a securID), one can be purchased from Penn State's Computer Store at <https://shop.computerstore.psu.edu/products2.cfm/ID/1855/c/penn-state-token>. If you cannot purchase one directly, please contact Sandy Gentzel, [sko1@psu.edu](mailto:sko1@psu.edu) for assistance in doing so.
  
3. If County Paid, review background check requirements.
  - a. If a background check has been performed as a requirement of employment, please provide documentation to support this. Otherwise, review steps 3b and 3c.
  - b. If credit card processing is in limited numbers, similar to a cashier – one card at a time versus a stack of registrations – then they would be considered “cashiers” and thus excluded from the background check provision.
  - c. If credit card processing occurs in larger numbers or batches, a background check should be considered.
  
4. If the user does not currently have a PSUID, request a PSUID from Kim McClelland.
  - a. A valid SSN is required to request a PSU ID.
  - b. This should be done over the phone NOT via email.
  - c. Contact Kim McClelland at (814) 863-9199.
  - d. Notify Craig Story, crs3.

5. Request a PSU Access Account
  - a. Once a PSU ID is issued, obtain an Access Account Form by following the link from our website.
  - b. Follow the instructions on the form and send in to the Accounts Office. Once the form is received it will take 1-2 days for processing. Be sure to retain a copy for your reference.
  - c. Call and verify that your account has been created then travel to the nearest signature station to obtain your access account id. You must have a valid photo ID. The access account form contains more information on this process.
  - d. Notify Craig Story, crs3.
  
6. Request an AG Account
  - a. Upon obtaining a PSU Access Account, submit a request to Ag IT Support following the link at our website.
  - b. Fill in the form with the requested information. PSU User ID is your Access Account. In the details section, state that you are requesting a new AG account for access to ePAY.
  
7. Complete the PCI DSS: General User Training Module / Review and Sign ePAY policy.
  - a. Completion of this training module is required on an annual basis. Users must obtain a score of 70% or more.
  - b. Directions for taking this training can be found on our website.
  - c. Notify Craig Story of completion and send in a copy of your completed exam along with the signed acknowledgement page from the ePAY policy document.
  
8. Administrative Services will request access to ePAY and notify user when access is granted.
  
9. User will contact the AIS help desk at 814-863-2276 to have their secure token assigned.

## Checklist

- ✓ Notify Administrative Services
- ✓ Submit ePAY User Account Request
- ✓ Background Check
- ✓ PSU ID Request
- ✓ Access Account Request
- ✓ Ag Account Request
- ✓ Complete PCI DSS: General User Training and send copy to Admin Services
- ✓ Sign and Return Acknowledgment page of ePAY policy document to Admin Services
- ✓ Obtain and Activate secure token