



# CAIA Introduction

## Frequently Asked Questions

### Introduction to CAIA: Frequently Asked Questions

Please find frequently asked questions and answers below to assist you in the transition to CAIA.

**1. How are passwords reset?**

Users will login with their PIV/CAC card or ID.me. ID.me password resets will be conducted through ID.me. PIV/CAC card users have a PIN, so if it needs to be reset the agency user should contact their local card office that issued the card. Therefore, password resets are not applicable for PIV/CAC card users because they use PINs.

**2. What method can I use for validating my identity?**

The working **email address** associated with an [OTCnet account](#) are required for verification, but a user can also use the Authenticator App or Text Messages (SMS) as an extra layer of security.

**3. Where can I find help on how to link my PIV or CAC card to OTCnet?**

Please find helpful links and guides below for linking a PIV/CAC card to an OTCnet account.

[Converting to PIV/CAC Authentication for OTCnet Guide](#)

[CASS for Fiscal Service SSO Account](#)

**4. Do I need to use my PIC/CAC card to login the OTCnet Bridge also?**

No, users will not need to use a PIV/CAC card to login to the OTCnet Local Bridge. An OTCnet user can access the OTCnet Bridge and login using OLB credentials. Check capture and processing users will need to continue to log in to the OLB using their OLB profile credentials.

**5. Do I need to use my PIV/CAC to Login to the OTCnet Test Environment?**

OTCnet test environment users do not have to link their PIV or CAC credentials. Users accessing a test environment (e.g., QAIc) will continue to log in using their testing username and password.

**6. If I have a PIV/CAC, do I also have to create user identity in ID me?**

If the user has been able to successfully link their PIV/CAC card, there is no need to also create an ID.me account which is primarily needed for non-Agency users without an issued PIV/CAC.

**7. What is SailPoint IIQ used for?**

If the user is new, their PLSA/LSA will register the user in SailPoint IIQ and request high level organization and role(s) for them in SailPoint.

After an access request is made in SailPoint, another PLSA/LSA will receive a notification that there is an access request pending their review. PLSA/LSAs will then login to SailPoint to approve or deny the requested High Level Organization (HLO) or roles. Please see the Printable Job Aid below for the steps of approving (or denying) requests in SailPoint.

- [Approve or Deny User Access Requests in SailPoint IIQ Guide](#)



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**8. Do PLSAs/LSAs direct users to SailPoint to register or do the PLSAs/LSAs create their accounts for them?**

In SailPoint, there is a self-request feature where the user can request OTCnet access themselves by selecting their HLO and role. However, SailPoint has a **delegated user feature** where a security administrator (PLSA/LSA) can request OTCnet access on behalf of a user. Currently, this is the **preferred method** for registering users in SailPoint (with the assistance of PLSAs/LSAs).

In OTCnet, the user cannot give themselves access, their security administrator (PLSA/LSA) must finish the process by making fine-grained selections for the user to be able to access certain endpoints with certain roles and that must be approved by another PLSA/LSA.

**9. Will SailPoint self-service work at the HLO level, or the 'children' level when a new user makes a request?**

Select your organization before selecting your role. IIQ will only have the HLO, while the lower-level endpoints (i.e., children level organization) will be selected in OTCnet.

**10. Will I still keep my same user role in OTCnet?**

Yes. And if you experience issues, please contact your PLSA/LSA.

**11. Who do I contact if I have questions regarding SailPoint IIQ?**

Customer Support is the Point of Contact for SailPoint questions and issues.

The OTCnet Customer Support Team

Toll free phone: 866-945-7920

DSN phone: 510-428-6824, Option 2

E-mail: [Fiscalservice.OTCChannel@citi.com](mailto:Fiscalservice.OTCChannel@citi.com)

**12. What are the best browsers to access SailPoint and OTCnet?**

The recommended browsers for accessing SailPoint and OTCnet are Microsoft Edge and Google Chrome.

**13. After I authenticated my PIV/CAC or ID.me, I got this notification that "An entitlement request has been submitted to enable privileged access to OTCnet. An email will be sent to [user email address] once your entitlement request has been processed." What does this mean?**

This means that a request for an HLO and role(s) for the user has been submitted by the PLSA/LSA or HLO in SailPoint IIQ. At this time, the user can login to OTCnet, and their information will be searchable in the OTCnet database.

Then the user will notify their PLSA or LSA, and the PLSA/LSA will login to OTCnet to assign the user an endpoint/role by searching for their email address in OTCnet. The PLSA/LSA will notify them when they have assigned them an endpoint role.

**14. My PLSA/LSA made me a new user account in SailPoint and provisioned it, but it is not showing up in OTCnet for the PLSA/LSA. Is there a delay?**

The process should be instant. The new user will log into OTCnet and then the PLSA/LSA can view them in OTCnet and complete the user provisioning.



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### **15. Who is my PLSA/LSA?**

If a user is not sure who their PLSA or LSA is, please reach out to our Customer Support Team and they can have the PLSA/LSA contact the.

The OTCnet Customer Support Team

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### **16. I currently have the LSA role assigned for my organization. Why can't I manage users in SailPoint IIQ?**

Our intention for SailPoint IIQ is for only the top level (HLO/FI) PLSA and LSAs to use SailPoint IIQ to manage OTCnet identity access. If the **Manage User** option is not available to you in SailPoint IIQ, but you know you possess an LSA role, this likely means your LSA role exists at a local level (child organization) within your HLO.

Although you will not be able to submit or approve access within SailPoint IIQ, you will be able to submit and approve endpoint (ALCs)/role requests for users within your organization in OTCnet. SailPoint IIQ is designed to allow the HLO/FI PLSA and LSAs to submit and approve user access request to grant a user access to their organization, while local LSAs will submit and approve user access request to grant a user access to organizational endpoints (ALCs)/roles in OTCnet. If you are not sure of your current access level for your LSA role, the OTCnet Customer Service Team can confirm your access level for you.

### **17. I changed my email address, and I can't login to OTCnet. What should I do?**

There are a few steps that should be performed:

- Validate using user's old email address used for validating their PIV/CAC card or ID.me.
- Add the HLO roles in SailPoint to the new user identity.
- Notify the OTCnet Customer Support Team of the email address associated with the PIV/CAC as well as any other email address for the user. They will update the Database in OTCnet to reflect the email address currently associated with the PIV/CAC or ID.me credentials. They will notify the CAIA team to delete or invalidate the account with the old email address.

The OTCnet Customer Support Team

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