

## REVISION CHART

Version	Primary Author(s)	Description of Version	Date Completed
1.0	Training	Original	1/5/2017
2.0	Amanda Dosch	Update	4/24/2019
2.1	Amanda Dosch	Minor Screenshot and Content updates	5/10/2019
2.2	Tavia Bazemore	Added note in regards to updating the Ship To address.	9/9/2019

The GSA Site Manager Tool is a web portal that USAccess role holders use to manage and update agency sites and workstations. The tool is accessible from a user's desktop computer or an activation station. The desktop computer must be set up with a card reader and ActivClient middleware to access Site Manager. Site Manager requires an active credential and appropriate USAccess role to log in to the tool.

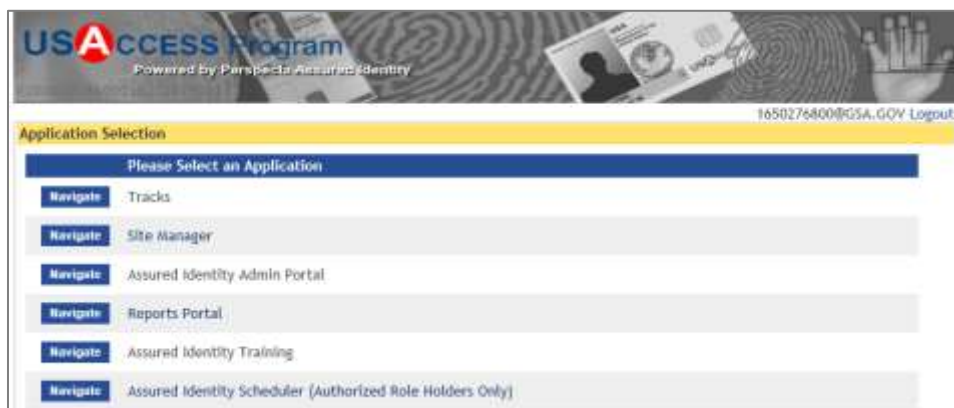
This Job Aid provides Agency Site Managers (ASMs) with instructions for using the Site Manager Tool to perform the following tasks: add a site, add workstations, assign sites to Local Site Managers (LSMs), check pending requests, and check locations within a user's agency and scope of permissions.

## Log in to Site Manager

Access Site Manager by logging in to the USAccess system: <https://portal.usaccess.gsa.gov/aisso>. The PIN associated with your PIV Credential is required to log into USAccess.



Upon successful login to the USAccess system, select the Site Manager Application and then your role. Role selection determines the system features that are shown.



## Agency Site Manager Home Tab

The Agency Site Manager Home tab shows available ASM Tools and a summary of pending tasks.



## Site Management

To search for an existing site, select “**Search Fields**.” The site search feature will only show results related to the user’s assigned role and scope in the system. For example, GSA Agency Site Managers will see only GSA sites. An ASM with scope limited to sub-agencies will only see sites within that agency/sub-agency scope.

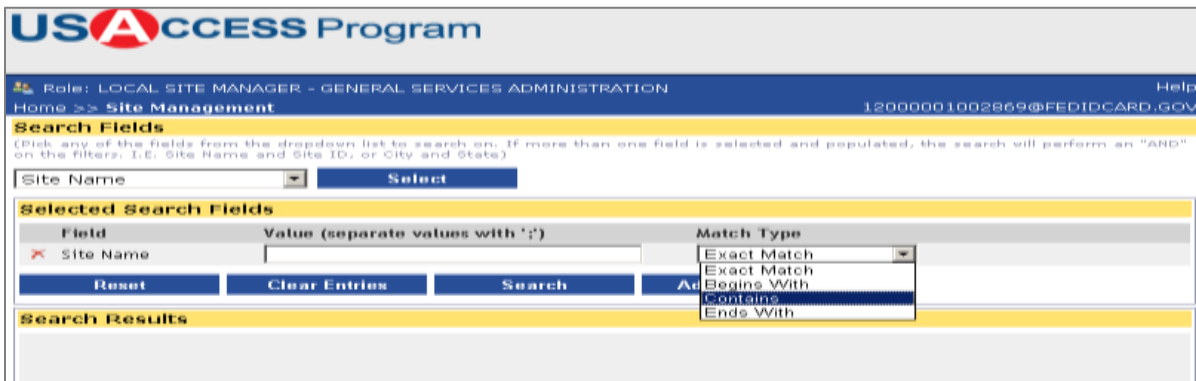


Available search fields appear in the drop down list.



The screenshot shows the USACCESS Program interface for an Agency Site Manager. The role is "AGENCY SITE MANAGER - DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT". The user is logged in as "12000001002869@FEDIDCARD.GOV". The page title is "Home >> Site Management". The "Search Fields" section is highlighted, showing a dropdown menu with the following options: Site Name, Site ID, Agency Name, Sub Agency, Address Line 1, City, State (2 char. abbr.), and Zip Code. The "Select" button is visible next to the dropdown. Below the dropdown, there are buttons for "Clear Entries", "Search", and "Add New Site".

Users can search using “**Selected Search Field**” and “**Match Type**” fields. In the example below, “**Site Name**” and “**Contains**” are the values chosen. “**Site Code**,” “**State**” and “**Zip Code**” selections are exact matches only.



The screenshot shows the USACCESS Program interface for a Local Site Manager. The role is "LOCAL SITE MANAGER - GENERAL SERVICES ADMINISTRATION". The user is logged in as "12000001002869@FEDIDCARD.GOV". The page title is "Home >> Site Management". The "Selected Search Fields" section is highlighted, showing a table with the following columns: Field, Value (separate values with ';'), and Match Type. The "Field" column has a dropdown menu with "Site Name" selected. The "Match Type" column has a dropdown menu with "Contains" selected. Below the table, there are buttons for "Reset", "Clear Entries", "Search", and "Add New Site".

## Create a New Site

Creating a site requires the same information for both LSMs and ASMs; however, the approval process differs. Click the “**Add a New Site**” button.



The screenshot shows the USACCESS Program interface for a Site Search. The page title is "Site Search". The "Select Search Fields" section is highlighted, showing a dropdown menu with "Site Name" selected. Below the dropdown, there is a checkbox for "Include inactive sites". At the bottom, there are buttons for "Reset", "Clear Entries", "Search", and "Add New Site".

## Populate Site Information

Complete the required fields (marked with a \*) in the Site Information tab: Site Name, Scheduler Site Name, Agency, Sub-Agency, Shared or Dedicated, Site Type, Site Function, and Start Date. Hours of operation and Site End Date can also be entered if the information is known.



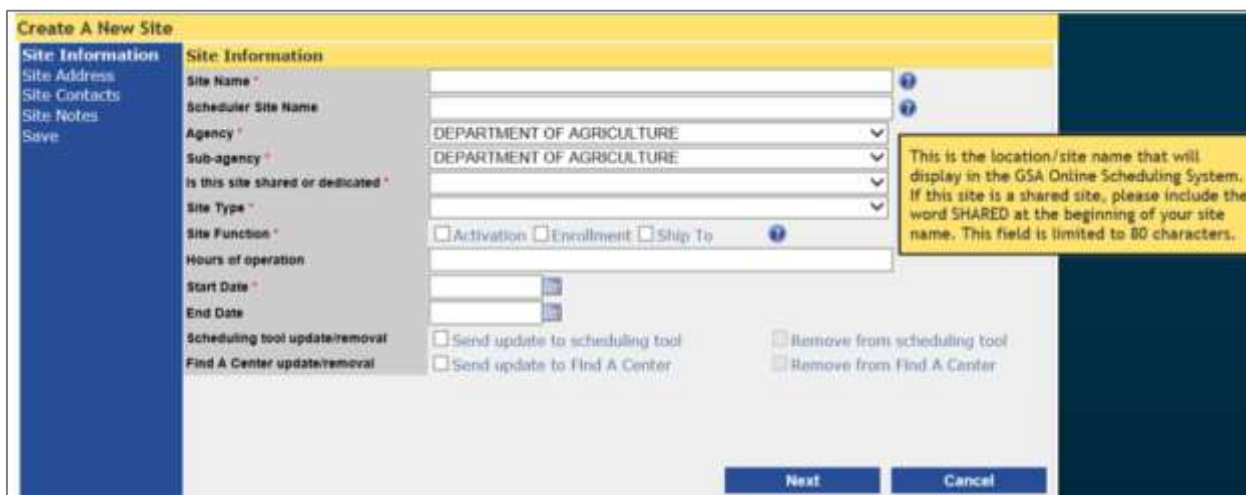
The “**Site Name**” appears on the ship-to location drop down box in the Sponsorship Portal. The “**Scheduler Site Name**” appears in the Assured Identity Scheduler.

Selecting the “?” help icon to the right of the “**Site Name**” field will prompt a pop up box to appear noting the Site Name will appear in the Sponsorship Portal when selecting a ship-to location.



Selecting the “?” help icon to the right of the “**Scheduler Site Name**” field will prompt a pop up box to appear indicating that the Location/Site Name will display in the Assured Identity Scheduler Tool. If the site is a shared site, include the word SHARED at the beginning of the site name. The “**Scheduler Site Name**” field is limited to 80 characters.

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Check the box beside **“Send update to scheduling tool”** if this site will be available for scheduling in the Assured Identity Scheduler tool. Check the box beside **“Send update to Find A Center”** if this site will be listed on [www.fedidcard.gov](http://www.fedidcard.gov) Find A Center.

When all Site Information is populated click the **“Next”** button.

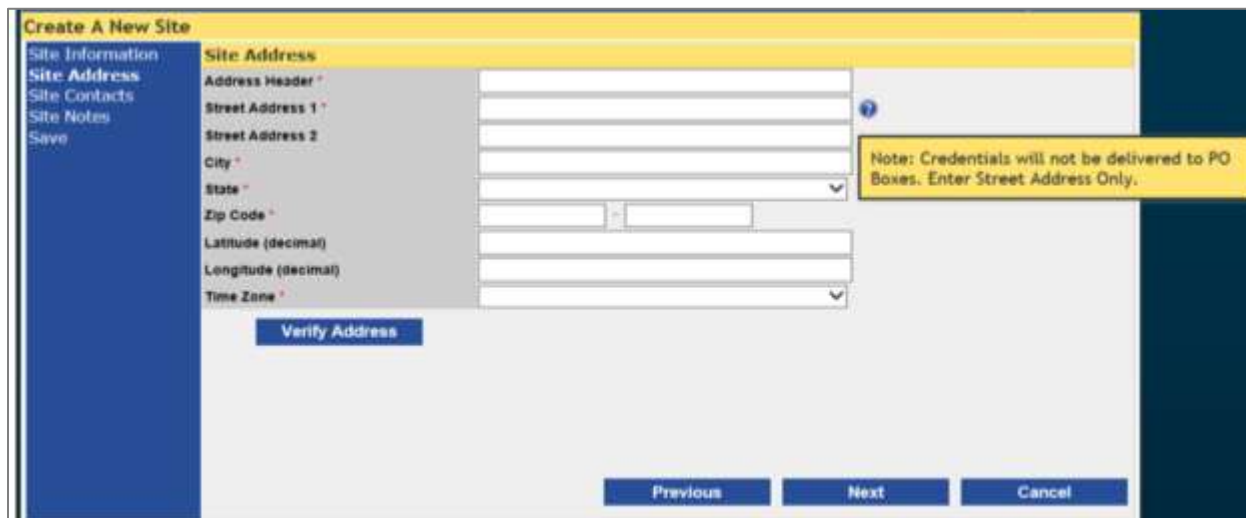
## Populate Site Address

Enter the required address information. Selecting the **“?”** help icon to the right of the **“Street Address”** field will prompt a pop up box to appear indicating that credentials will not be delivered to PO Boxes. This is important to remember if the site being created is a **“Ship To”** site.

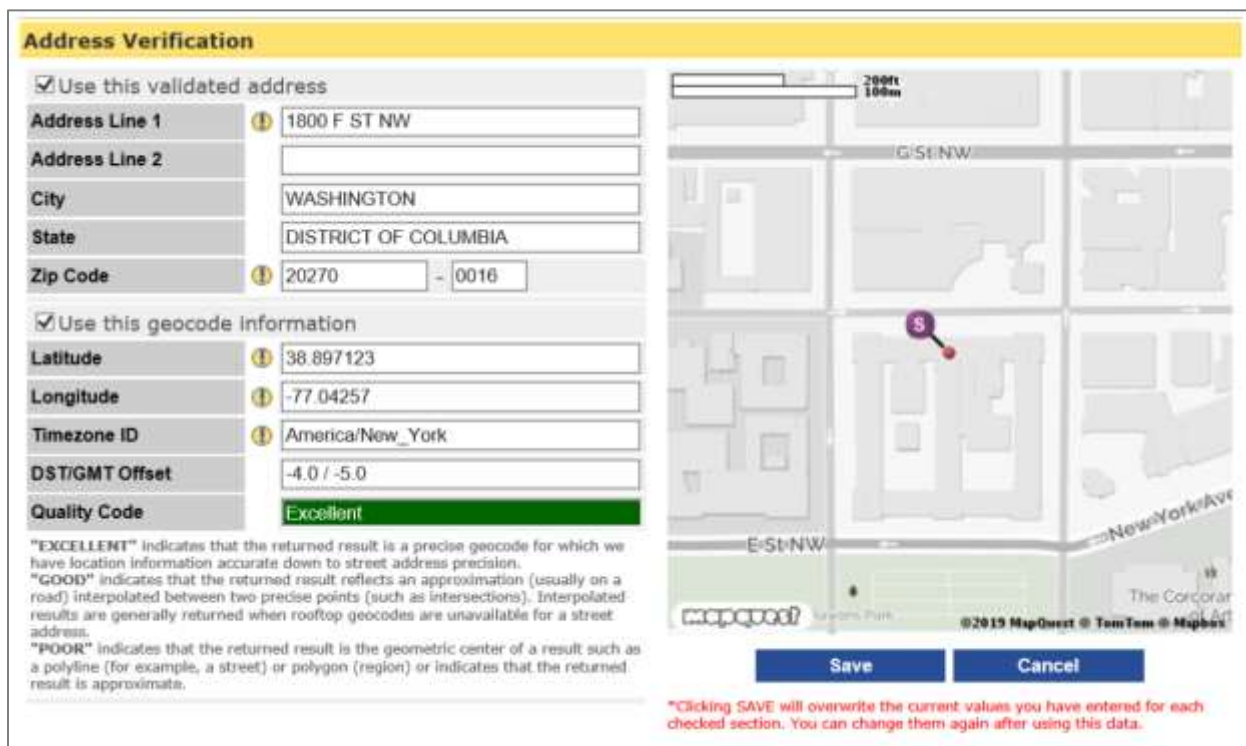
**Note:** Update the Ship-To address as follows:

- **Address Header:** Site Name (e.g., GSA - USAccess)
- **Street Address Line 1:** Agency desired name (e.g., GSA - USAccess) - This can also include a sub-agency or bureau.
- **Street Address Line 2:** Full street address including Room/Suite Number (e.g., 1800 F Street NW, Room 1033A)
- **City:** Washington
- **State:** DC
- **Zip Code:** 20405





Note: if the Latitude and Longitude coordinates are unknown, click the **“Verify Address”** button. A map will appear and the coordinates will be provided only if the entered address is valid. If the entered address is valid, ensure the **“Use this validated address”** box at the top of the Address Verification page is checked. The geocode information will be provided including the Latitude and Longitude coordinates.



Yellow “!” icons on the Address Verification page indicate changes made by the verification tool. Click **“Save”** to accept the changes or **“Cancel”** to cancel the changes made by the Address Verification tool.

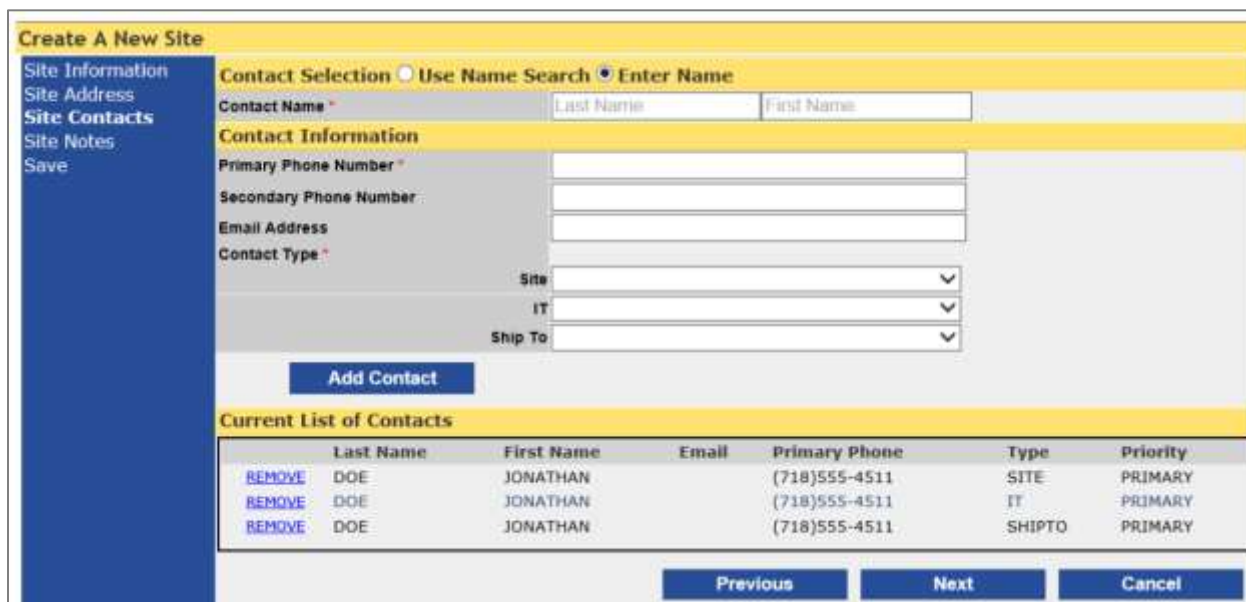
Check the **“Use this validate address”** and **“Use this geocode information”** check boxes to save only the validated address or only the geocode information. Geocode information is required if the **“Send update to Scheduling tool”** box is checked on the Site Information tab.

When all Site Address information is populated click the **“Next”** button.

## Populate Site Contacts

Enter **“Contact Name”** and **“Contact Information.”** Select either **“Primary”** or **“Secondary”** for **“Contact Type.”** Click **“Add Contact.”**

Once the contact has been added they will appear in the **“Current List of Contacts”** on the screen. If the contact person or phone number has changed, select **“Remove”** and enter the new contact information.



**Create A New Site**

Site Information  
Site Address  
**Site Contacts**  
Site Notes  
Save

Contact Selection ☐ Use Name Search ☒ Enter Name

Contact Name \*  Last Name  First Name

Contact Information

Primary Phone Number \*

Secondary Phone Number

Email Address

Contact Type \*

Site

IT

Ship To

**Add Contact**

**Current List of Contacts**

	Last Name	First Name	Email	Primary Phone	Type	Priority
<a href="#">REMOVE</a>	DOE	JONATHAN		(718)555-4511	SITE	PRIMARY
<a href="#">REMOVE</a>	DOE	JONATHAN		(718)555-4511	IT	PRIMARY
<a href="#">REMOVE</a>	DOE	JONATHAN		(718)555-4511	SHIPTO	PRIMARY

**Previous** **Next** **Cancel**

When all Site Contacts information is populated click the **“Next”** button.

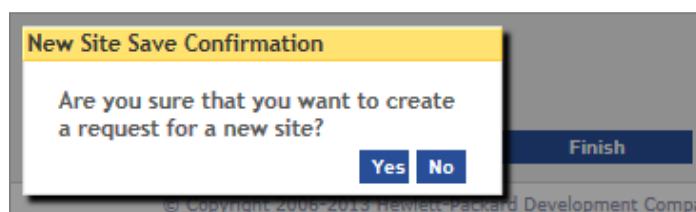
## Populate Site Notes

Enter any applicable notes about the site. The **“Site Notes”** field is limited to 256 characters. When the information is populated click the **“Next”** button.





A pop up box will appear requesting a confirmation to save the new site. Click **“yes.”**



Scroll to the bottom of the screen and click **“Finish”** to save the new site information.



## Add a Workstation

To add a workstation, select from the search fields and enter the **“Agency Name”** in the Search Field.

### Site Search

#### Select Search Fields

Pick any of the fields from the drop down list to search on. If more than one field is selected and populated, the search will perform and "AND" on the filters (e.g. Site Name and Site ID or City and State).

Agency Name
Select

Field	Value (separate values with ';')	Match Type
REMOVE Agency Name	Department of Agriculture	Exact Match

☐ Include inactive sites

Reset
Clear Entries
Search
Add New Site

#### Site Search Results (615 records returned)

	Site Code	Site Name	Address Header
<a href="#">EDIT SITE</a> <a href="#">CARD STOCK CONSUMABLES</a>	100002	USDA - INDEPENDENCE AVE	USDA PHOTO ID/HSPD-12 OFFICE
1400 INDEPENDENCE AVE. SW , WASHINGTON , DC 20250			
<a href="#">EDIT SITE</a> <a href="#">WORKSTATIONS</a>	10002	USDA - INDEPENDENCE AVE	USDA PHOTO ID/HSPD-12 OFFICE
1400 INDEPENDENCE AVENUE SW , WASHINGTON , DC 20250			
<a href="#">EDIT SITE</a> <a href="#">CARD STOCK CONSUMABLES</a>	100025	USDA - CENTRE AVE	APHIS

In the example above, Department of Agriculture (USDA) was selected which yielded all USDA sites in the **"Site Search Results."** Click on **"Workstations"** next to the desired location.

Multiple workstations may appear for a single site as shown in the image below. Users have an option to edit workstation information or modify the workstation schedule.

To modify the workstation schedule, click on **"Workstation Schedule."**

Site Management   Add Workstation   Edit Site Schedule						
Workstation List for USDA - INDEPENDENCE AVE (10002)						
System Id	Start Date	End Date	Workstation Type			
DBMLGW	04/12/2014		Fixed Activation	Edit Workstation	Workstation Schedule	Printers
E7C52T	03/01/2017		Fixed Activation	Edit Workstation	Workstation Schedule	Printers
U54P57	01/19/2016		Fixed Activation	Edit Workstation	Workstation Schedule	Printers
2QA775	12/20/2018		Fixed CU	Edit Workstation	Workstation Schedule	Printers
PLDXK5	09/06/2018		Fixed CU	Edit Workstation	Workstation Schedule	Printers
QDVUG6	12/20/2018		Fixed CU	Edit Workstation	Workstation Schedule	Printers
RMMSKU	12/20/2018		Fixed CU	Edit Workstation	Workstation Schedule	Printers
W3RWWF	09/13/2018		Fixed CU	Edit Workstation	Workstation Schedule	Printers
FF7PUD	04/12/2015		Fixed Enrollment	Edit Workstation	Workstation Schedule	Printers
MAKUXV	04/12/2015		Fixed Enrollment	Edit Workstation	Workstation Schedule	Printers

Users can select the days of the week and times that the workstation will be available and the types of activities the station will perform (all types of activities, only enrollments, or only activations). If an agency is set up for Local Print, there's an option to select Printers and view pertinent printer details.

Site Management   Add Workstation   Edit Site Schedule						
Workstation List for USDA FSIS URBAN DALE (105256)						
System Id	Start Date	End Date	Workstation Type			
CMMH74	10/24/2018	10/31/2018	Fixed CU	Edit Workstation	Workstation Schedule	Printers
Printer List For Workstation CMMH74						
Printer Serial Number	Printer Model	Status				
B9130096	HDP5000 ID Card Printer	ENABLED	Edit Printer	Delete Printer		
			Add Printer	Close		

The “?” help icon states that workstations schedules can be set for all activities or for individual activities. The “All” selection in the drop down list includes all of the activities available for the workstation schedule. This means a schedule cannot be set for all activities and the individual activities at the same time.



**Workstation Schedule for Fixed CU (CMMH74)**

☐ Disable Workstation: Disable the workstation to remove it from the schedule. Use this option when a workstation is out of service.

☒ Use Specific Workstation Schedule: Workstation follows the site schedule unless you create a schedule specifically for this workstation.

**Update Workstation** **Close**

**Daily Schedule** **Schedule Exceptions**

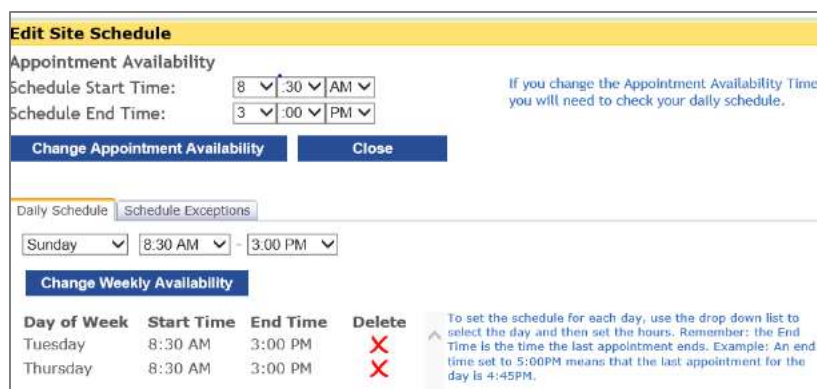
Sunday 8:30 AM 3:00 PM -Select Activity-

**Change Weekly Availability**

To set the schedule for each day, use the drop down list to select the day and then set the hours. Remember: the End Time is the time the last appointment ends. Example: An end time set to 3pm means that the last appointment for the day is 4:45pm.

Workstation schedules can be set for All activities or for individual activities. The All selection includes all of the activities available for the workstation schedule. This means a schedule cannot be set for all of the activities and the individual activities at the same time.

Workstation schedules can be modified to allot time frames for different activities (e.g., enrollment appointments can be scheduled from 9AM–12PM and activation appointments can be scheduled from 1PM–3PM.



**Edit Site Schedule**

**Appointment Availability**

Schedule Start Time: 8:30 AM

Schedule End Time: 3:00 PM

**Change Appointment Availability** **Close**

**Daily Schedule** **Schedule Exceptions**

Sunday 8:30 AM 3:00 PM

**Change Weekly Availability**

Day of Week	Start Time	End Time	Delete
Tuesday	8:30 AM	3:00 PM	X
Thursday	8:30 AM	3:00 PM	X

To set the schedule for each day, use the drop down list to select the day and then set the hours. Remember: the End Time is the time the last appointment ends. Example: An end time set to 5:00PM means that the last appointment for the day is 4:45PM.

If you change the Appointment Availability Time, you will need to check your daily schedule.

To remove specific dates for the workstation availability click on the **“Schedule Exceptions”** tab.

Click on the date(s) to be removed. These dates can include holidays or any specific days that a Local Site Manager will be unavailable.

Once you've made the edits to workstation schedule, a message box will appear to enter the **“Workstation ID”** and **“Start Date.”** Click **“Update.”**

Once the workstation has been updated, a message will appear that states **“Workstation Validated Successfully”** in green text.

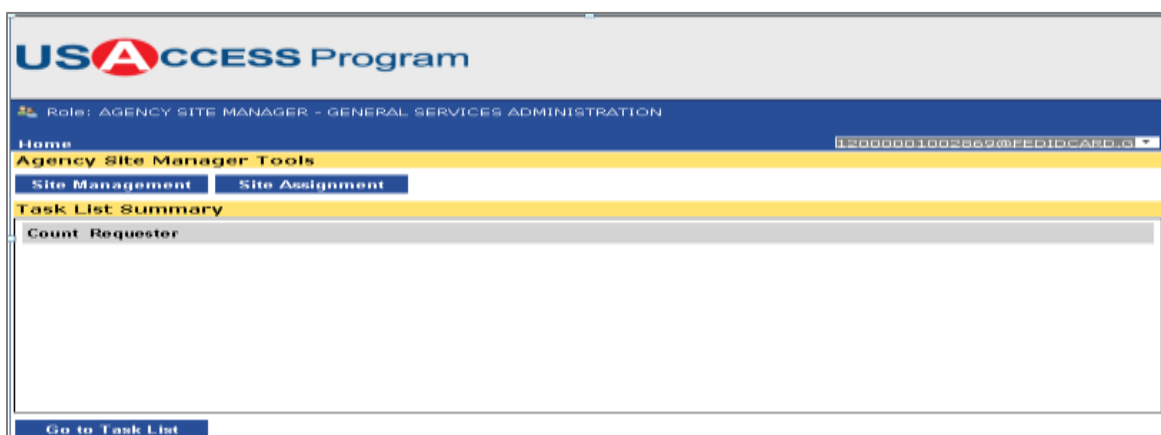


If the Workstation System ID is unknown, it can be looked up by clicking on the USAccess system info icon on the desktop. A pop up box will appear on the desktop:

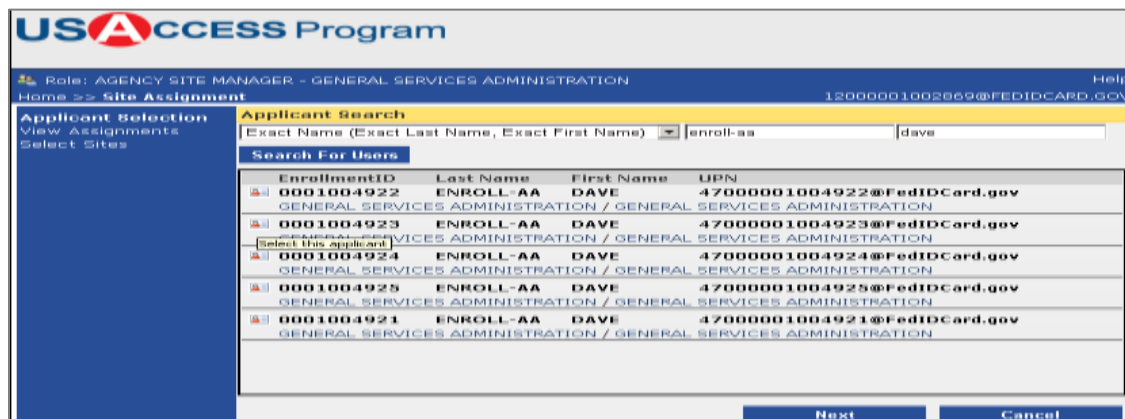


## Site Assignment

Use the “**Site Assignment**” button on the ASM Home tab to assign sites to Local Site Managers.

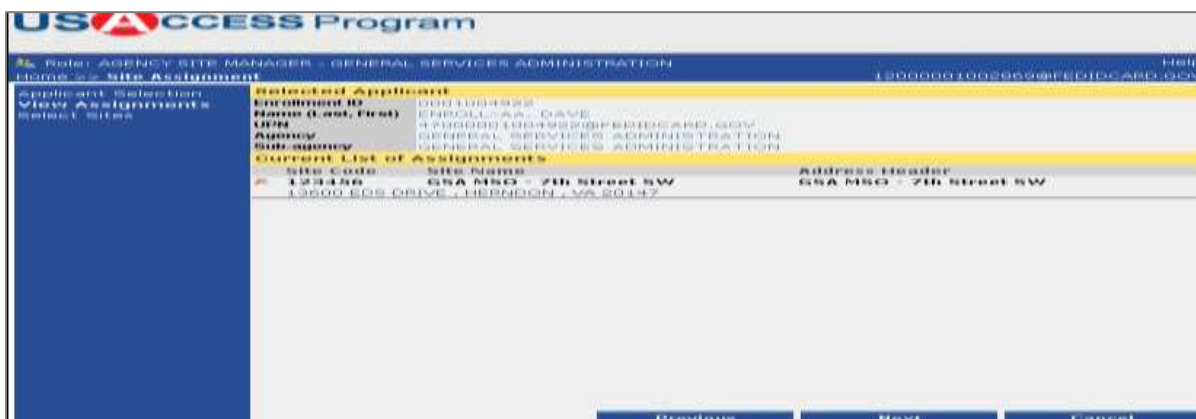


In the “**Applicant Search**” field enter the Exact Last Name and First Name of the applicant and click “**Search For Users.**” Search Results are returned on the page. Click the icon next to the Enrollment ID to select the LSM for assignment. Click “**Next**” to proceed to the **View Assignments** page.





In the example below, the LSM has one current Site Assignment.



**USACCESS Program**

Role: AGENCY SITE MANAGER - GENERAL SERVICES ADMINISTRATION

Home >> Site Assignment

12000001002859@FEDIDCARD.GOV

Applicant Selection  
View Assignments  
Select Sites

**Selected Applicant**

Enrollment ID: 0001004922  
Name (Last, First): ENROLL-AS, DAVE  
UPN: 47000001004922@FEDIDCARD.GOV  
Agency: GENERAL SERVICES ADMINISTRATION  
Sub-Agency: GENERAL SERVICES ADMINISTRATION

**Current List of Assignments**

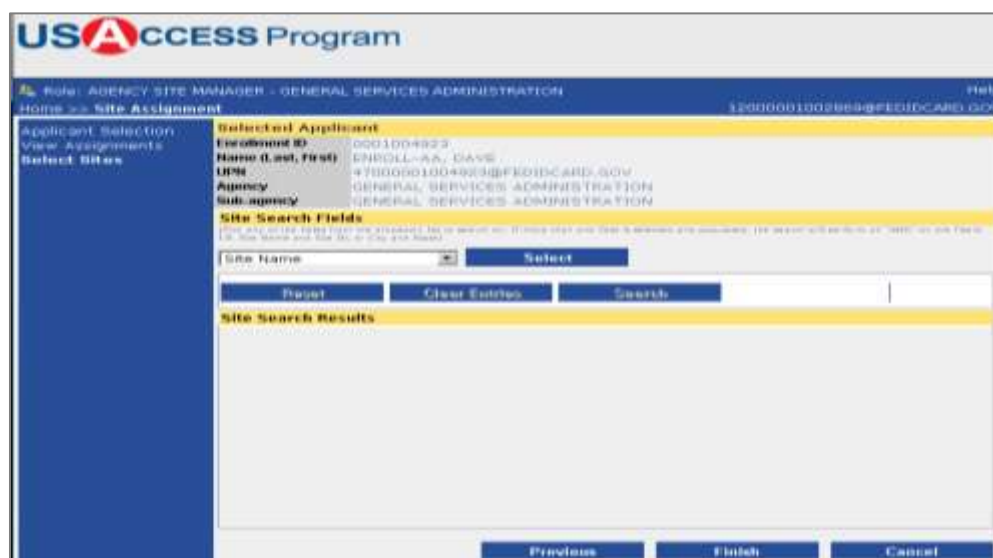
Site Code	Site Name	Address Header
124486	GSA MSC - 7th Street SW	GSA MSC - 7th Street SW
13000 GPS DRIVE, HERNDON, VA 20147		

Previous Next Cancel

Once the applicant has been selected, you may search the Site Search Fields dropdown list. Site search options include:

- Site Name
- Site ID
- Agency Name
- Sub-Agency
- Address Line 1
- City
- State
- Zip Code

Search for site you want to assign to this LSM.



**USACCESS Program**

Role: AGENCY SITE MANAGER - GENERAL SERVICES ADMINISTRATION

Home >> Site Assignment

12000001002859@FEDIDCARD.GOV

Applicant Selection  
View Assignments  
Select Sites

**Selected Applicant**

Enrollment ID: 0001004922  
Name (Last, First): ENROLL-AS, DAVE  
UPN: 47000001004922@FEDIDCARD.GOV  
Agency: GENERAL SERVICES ADMINISTRATION  
Sub-Agency: GENERAL SERVICES ADMINISTRATION

**Site Search Fields**

Site Name

**Site Search Results**

Previous Finish Cancel

Assign a site by clicking the icon to the left of the **“Site Code.”**

The screenshot shows the 'USACCESS Program' interface with the 'Agency Site Manager' window open. The 'Selected Applicant' section displays details for ENROLL-AA, DAVE. The 'Site Search Fields' section shows a search for '20171.22202'. The 'Site Search Results (6 records returned)' table lists the following sites:

Site Code	Site Name	Address Header
20171	EDS	EDS
20171	EDS	EDS
20171	EDS	EDS
20171	EDS	EDS
20171	EDS	EDS
20171	EDS	EDS

Confirm the site assignment by clicking **“Yes”** when the pop up box appears.

The screenshot shows the 'USACCESS Program' interface with the 'Agency Site Manager' window open. A pop-up box titled 'Add Site Assignment Confirmation' is displayed, asking for confirmation to assign the site '123456 GSA MSD - 7th Street SW' to the applicant 'ENROLL-AA, DAVE'. The 'Yes' button is highlighted.

The Site Assignment Saved pop up box appears and confirms that the Site Assignment successfully saved. The confirmation contains the LSM name and the name of the site being assigned. To assign more sites to this applicant, click **“Ok”** to close the dialog box and select the next site to assign.

The screenshot shows the 'USACCESS Program' interface with the 'Agency Site Manager' window open. A pop-up box titled 'Site Assignment Saved' is displayed, confirming the successful assignment of the site '123456 GSA MSD - 7th Street SW' to the applicant 'ENROLL-AA, DAVE'. The 'OK' button is highlighted.

## Task List

The “**Tasks Pending Your Review**” tab shows the ASM the tasks that are in queue for approval. Click “**Next.**”



The “**Tasks Pending SSM Review**” tab shows the System Site Manager (SSM) what needs to be reviewed and approved.



Site Code	Site Name	Reg Date	ASM Appr Date	Site Agency
100197	SHIP TO TEST	9/24/2013	9/24/2013	GENERAL SERVICES ADMINISTRATION
REQUESTER REGISTRAR-A, STG NMN / registrar.as@reg.nm / GENERAL SERVICES ADMINISTRATION				
APPROVER REGISTRAR-A, STG NMN / registrar.as@reg.nm / GENERAL SERVICES ADMINISTRATION				
100253	TEST REQUEST	10/3/2013	10/3/2013	GENERAL SERVICES ADMINISTRATION
REQUESTER LSM-REGISTRAR, STAGING NMN / 47003000036010@fedidcard.gov / GENERAL SERVICES ADMINISTRATION				
APPROVER ASM-REGISTRAR, STG NMN / 47003000036023@fedidcard.gov / GENERAL SERVICES ADMINISTRATION				
100254	KATECO-LSM	10/3/2013	10/3/2013	GENERAL SERVICES ADMINISTRATION
REQUESTER LOCALSITE-A, STAGING NMN / 47003000036088@fedidcard.gov / GENERAL SERVICES ADMINISTRATION				
APPROVER AGENCYSITE-A, STAGING NMN / 47003000036089@fedidcard.gov / GENERAL SERVICES ADMINISTRATION				
100257	KATE SITE-B	10/4/2013	10/4/2013	GENERAL SERVICES ADMINISTRATION
REQUESTER AGENCYSITE-A, STAGING NMN / 47003000036088@fedidcard.gov / GENERAL SERVICES ADMINISTRATION				
APPROVER AGENCYSITE-A, STAGING NMN / 47003000036089@fedidcard.gov / GENERAL SERVICES ADMINISTRATION				
100263	THIS IS MY SITE	10/7/2013	10/7/2013	GENERAL SERVICES ADMINISTRATION
REQUESTER ASM-REGISTRAR, STG NMN / 47003000036023@fedidcard.gov / GENERAL SERVICES ADMINISTRATION				
APPROVER ASM-REGISTRAR, STG NMN / 47003000036023@fedidcard.gov / GENERAL SERVICES ADMINISTRATION				

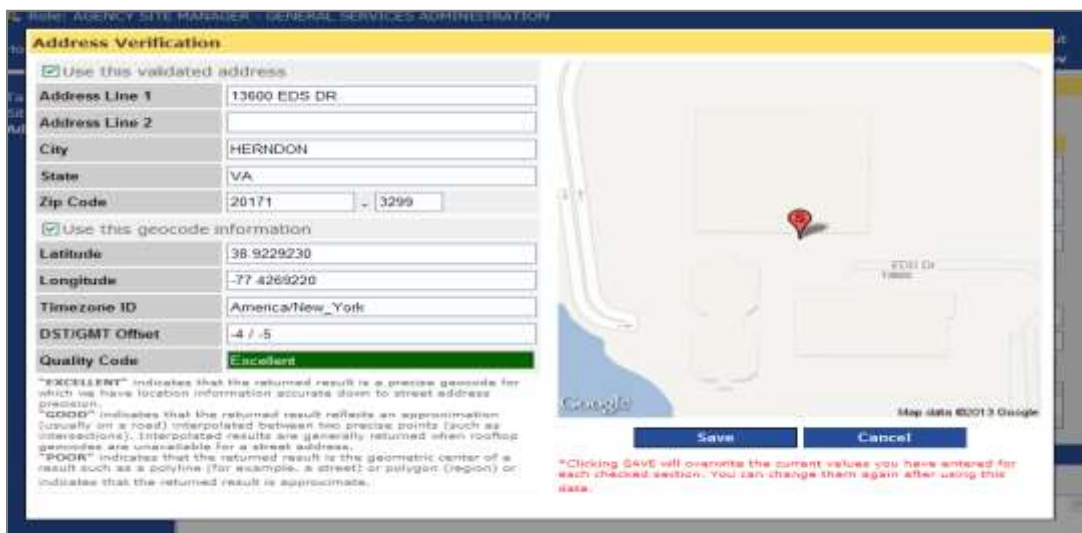
## Review and Approve Site Information Changes

The “**Site Information**” page shows proposed changes that can either be approved or edited further. If the “**Proposed Changes**” are accurate then click the box beside “**Approve Site Information Changes**” at the bottom of the page. If edits need to be made, click the “**Edit**” button.

The “**Address Information**” page shows proposed changes that can either be approved or edited further. Click “**Verify Address**” to ensure the address is accurate.

If the address is correct, click the “**Save**” button.





**Address Verification**

☒ Use this validated address

Address Line 1: 13600 EDS DR  
 Address Line 2:   
 City: HERNDON  
 State: VA  
 Zip Code: 20171 - 3299

☒ Use this geocode information

Latitude: 38.9229230  
 Longitude: -77.4269220  
 Timezone ID: America/New\_York  
 DST/GMT Offset: -4 / -5  
 Quality Code: Excellent

"EXCELLENT" indicates that the returned result is a precise geocode for which we have location information accurate down to street address precision.  
 "GOOD" indicates that the returned result reflects an approximation (usually on a road) interpolated between two precise points (such as intersections). Interpolated results are generally returned when rooftop geocodes are unavailable for a street address.  
 "POOR" indicates that the returned result is the geometric center of a result such as a polyline (for example, a street) or polygon (region) or indicates that the returned result is approximate.

Map data ©2013 Google

Save Cancel

\*Clicking Save will overwrite the current values you have entered for each checked section. You can change them again after using this data.

Once the address has been verified and saved a **"Request Approval"** pop up box will appear. If all information is approved, click **"Yes."** If information needs to be edited, click **"No"** and make the necessary changes.



**REQUEST APPROVAL**

Are you sure that you want to update this request?

Site Code : 100260  
 Site Name : ADAM - TEST LAB TWO  
 Site Information : REJECTED  
 Site Address : APPROVED

New sites require that both portions of the request be approved. If either portion of a new site request has been rejected, the entire request will be rejected.

Yes No

Like LSMs, ASMs can view a **"My Submitted Requests Summary"** list. Click the **"View Your Requests"** button to get a more detailed look at the requests in the ASM task list.

Unprocessed (pending) and In Process Requests cannot be marked as read. An SSM will need to cancel these requests. Click **“OK.”**

Req ID	Req Date	Site Code	Site Name
101	10/7/2013 10:00:29 AM	100230	D-L-E
106	10/7/2013 2:39:42 PM	100263	THIS IS MY SITE
107	10/7/2013 2:47:08 PM	100264	ADAM'S HOUSE OF II REPUTE
108	10/7/2013 3:08:25 PM	100265	HP
111	10/7/2013 3:19:06 PM	100268	ASM CREATED 3
112	10/7/2013 3:24:47 PM	100269	ASM CREATED 4
201	10/22/2013 1:46:31 PM	100297	GSA TEST SITE 4

Click **“UPN@USAccess.gov”** at the top right hand corner of the page to exit Site Manager. The dropdown list will appear. Click **“logout”** at the bottom of the list.