

**Bureau of the Fiscal Service
FedInvest Access Request
Case Management System
(Form Completion Instructions)**

General Information: The Case Management Access Form is for employees who need either Update or View access to only the **Case Management System (CMS)** to manage individual case balances available for investment within their district.

Complete each section using the detailed information below:

- **Effective Date:** This field is required.

- **Action Requested:** Select one item from the following group. **This field is required.**
 - **Grant Access** = New access to Case Management System
 - **Add Districts** = Access to additional Districts
 - **Revoke Access** = Revoke user access to Case Management System
 - **Revoke Districts** = Revoke specified Districts
 - **Supervisor Change** = Change in Supervisor
 - **Other (List)** = List any other requested changes

- **Role Requested:** Select one item from the following group. **This field is required.**
 - **Clerk Full** – This role is for employees of federal agencies or their contractors who manage individual case balances available for investment within their district. Clerk Full access enables a user to establish new cases; record deposits, withdraws, and transfers; and run activity and balance reports for their district.

 - **Clerk View** - This role is for employees of federal agencies or their contractors who need to view individual case balances available for investment within their district. Clerk View access enables a user to view case balances and transactions and run reports for their district.

 - **Case Fund Manager** – This role is for employees of federal agencies or their contractors who perform administrative functions within the Case Management System. Case Fund Manager access enables a user to view case balances and transactions, produce reports for all Districts, and perform certain administrative duties.

 - **ISCO Accountant** – This role is for employees of federal agencies or their contractors who perform administrative functions within the Case Management System. ISCO Accountant access enables a user to view case balances and transactions and run reports for all districts.

- **AO Auditor** – This role is for employees of federal agencies or their contractors who perform administrative functions within the Case Management System. AO Auditor access enables a user to view case balances and transactions and run additional reports for all districts.
- **Account Specific Information:** Select the District from the dropdown. If multiple districts are needed, use the additional dropdowns provided.
- **User Information:** Please fill out **all** information as completely as possible. **Fields are required unless noted below.**
 - **Name:**
 - **Agency Name:**
 - **Street Address Line 1:**
 - **Street Address Line 2:** (optional)
 - **City, State, ZIP:**
 - **Telephone Number:**
 - **E-mail Address:** **Must be linked to PIV/CAC card or ID.me account.**
 - **User's Signature:**
- **Access Administrator Information:** An Access Administrator Form must be on file for the individual signing the CMS Access Form. **All fields are required.**
 - **Access Administrator Name:**
 - **Telephone Number:**
 - **Email Address:**
 - **Access Administrator Signature:**

After verifying your information is correct, email the form to FedInvestor@fiscal.treasury.gov.

If you require assistance with this form, please contact the Investments Program Team using the following contact information:

Email: fedinvestor@fiscal.treasury.gov

Phone: 304-480-5151