AnnounceDirect: Access Provisioning Guide

Date: 10/24/2026

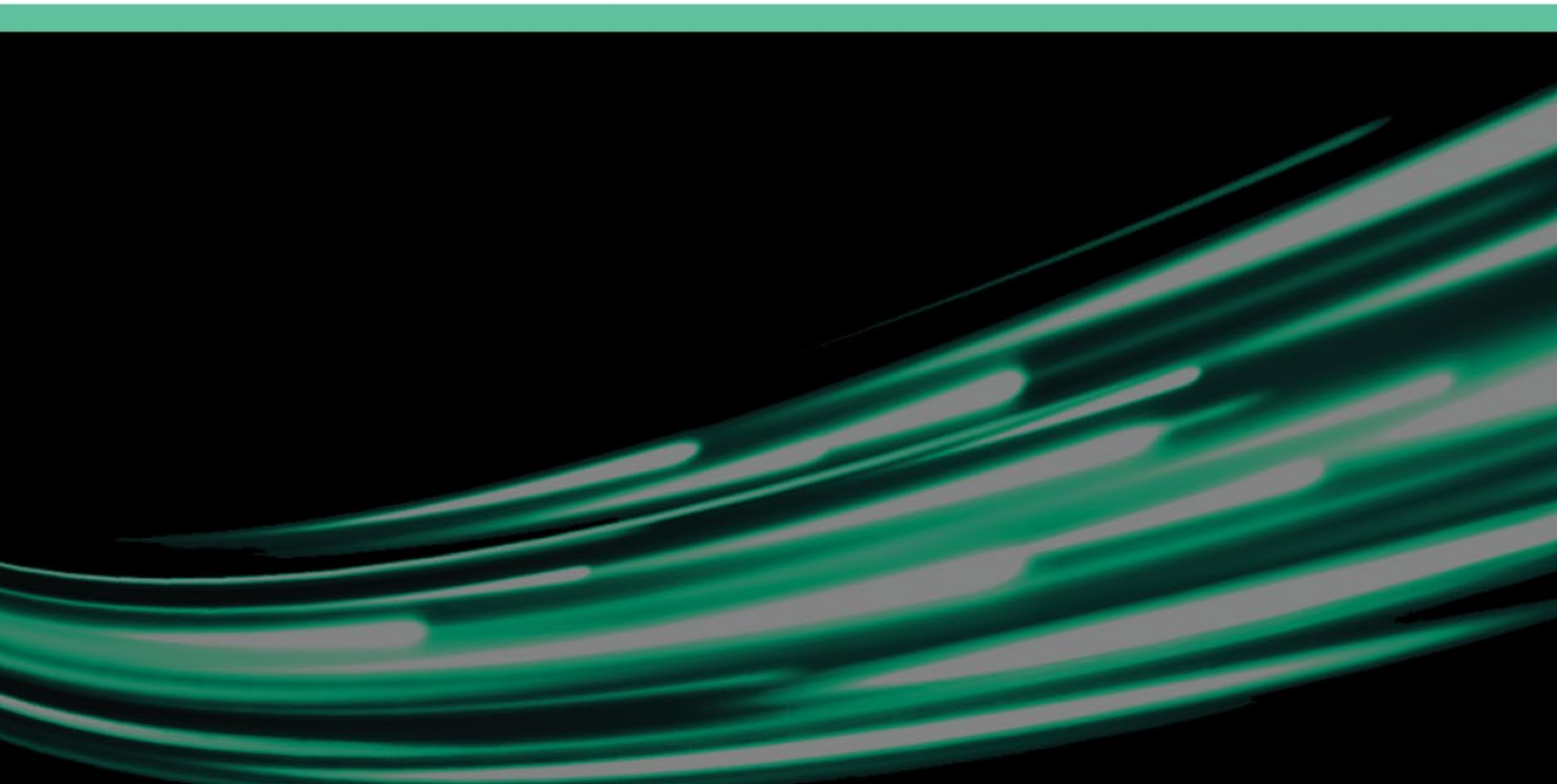


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About

AnnounceDirect is a MyDTCC portal application that allows Redemption Agents (and in the future, issuers and third-party stakeholders) who have been onboarded to AnnounceDirect to provide Corporate Action announcement information directly to DTCC's announcement and processing systems.

This document serves as a quick guide for **Access Coordinator**s (ACs) and **Super Access Coordinators** (SACs) to provision access and entitlements to the AnnounceDirect product through the Customer Registration System (CRS).

For further details on user profile creation and maintenance, please refer to the CRS Online Help located within the DTCC Learning Center.

Note

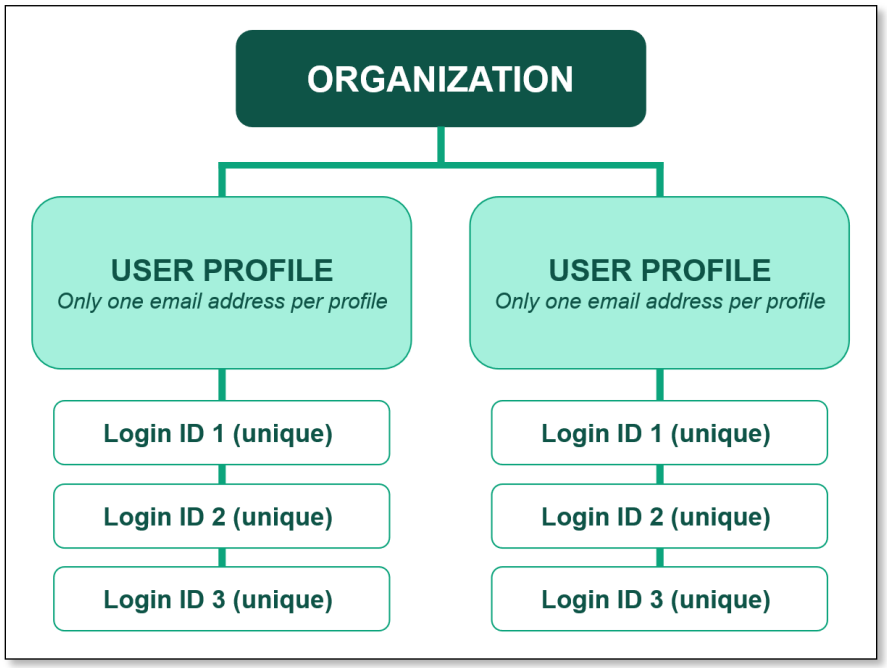
DTC'S ANNOUNCEDIRECT PROPOSAL DESCRIBED HEREIN WILL BE THE SUBJECT OF A PUBLIC RULE FILING WITH THE U.S. SECURITIES AND EXCHANGE COMMISSION ("SEC"). THE PROPOSAL MAY NOT TAKE EFFECT UNTIL IT IS FILED WITH AND APPROVED BY THE SEC.

CRS Profiles

Overview

To provision AnnounceDirect access to an individual within your organization, they'll need to obtain a Profile within the Customer Registration System (CRS). A user's CRS Profile is unique by company/organization, per email address.

All user Profiles are created with at least one Login ID. A Login ID, once created, enables the user to access the products for which they are provisioned, such as AnnounceDirect. A single user's Profile may contain multiple Login IDs.



As an Access Coordinator at your organization, navigate to the Customer Registration System product located within the MyDTCC portal.

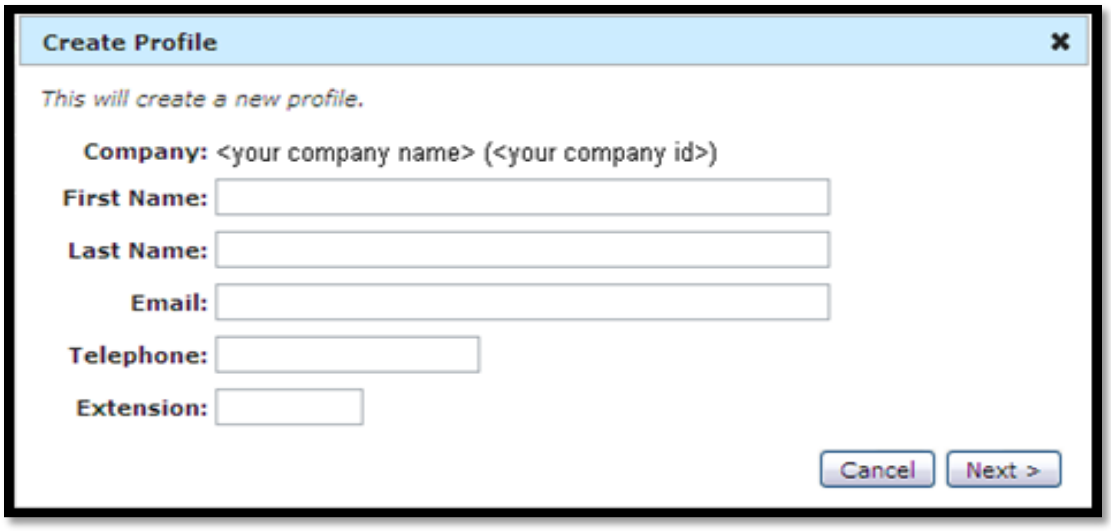
1. Log in using your credentials at https://myportal.dtcc.com.
2. Navigate to the CRS tile.
3. Under **User Profiles**, select **Create Profile** (for new Profiles) or **Search Profiles** (to create a new Login ID or provision access to an existing Login ID).
    a. To begin with both a new Profile and Login ID, proceed to the next section, Create Profile.
    b. To create a new Login ID associated with an existing Profile, visit the section Create Login ID.
    c. To grant or update entitlements on a Login ID, skip ahead to Provisioning Roles.

Getting Started

To create a new Profile and Login ID, follow the steps below.

Create Profile

1. From the CRS home page, navigate to **User Profiles** → **Create Profile**.
   The **Create Profile** window appears.
2. Enter the user's profile information and click **Next**.
   The telephone extension field is optional.

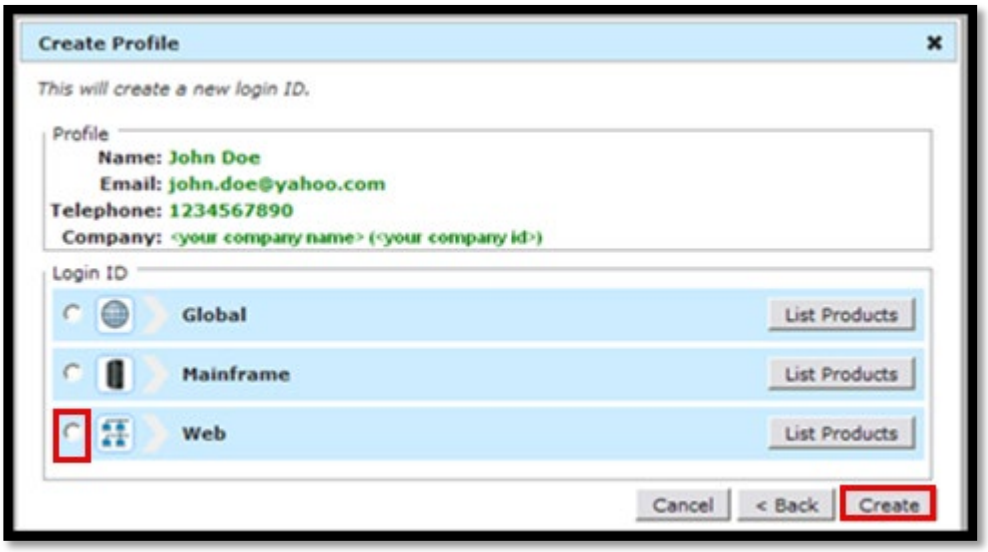


Note

If a profile already exists for the email address you entered, a warning message will display: "A matching profile already exists in CRS." You may not create another profile with the same email address. Either change the email address or click **Cancel** and search for the existing user profile.

If the email domain (the characters to the right of the "@") you entered doesn't match any of your company's email domains, you are prompted to add the email domain to the list of your company's email domains.

3. Select the radio button for **Web** and click **Create**.
   Now that Profile creation is complete, you are able to add a Login ID (required step).



Create Login ID

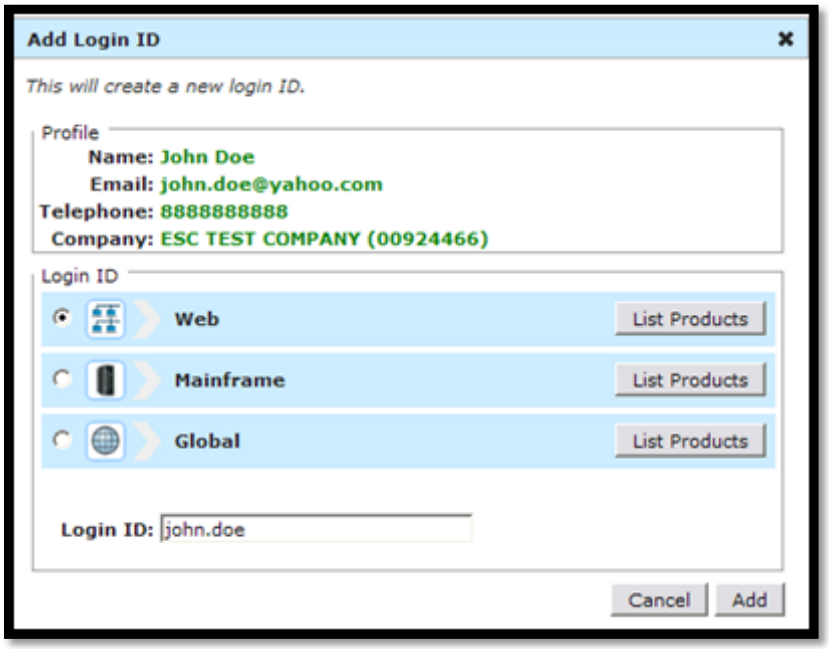
If you've just completed the earlier section on creating a Profile, you are directed to a screen to continue with creation of a **Login ID**.

If you already have a Profile, from the CRS home screen visit **Profiles** → **Search Profiles**, and search for your existing MyDTCC Profile, then click the dropdown arrow on the lower right-hand corner of the human/machine avatar image and select **Add Login ID**.

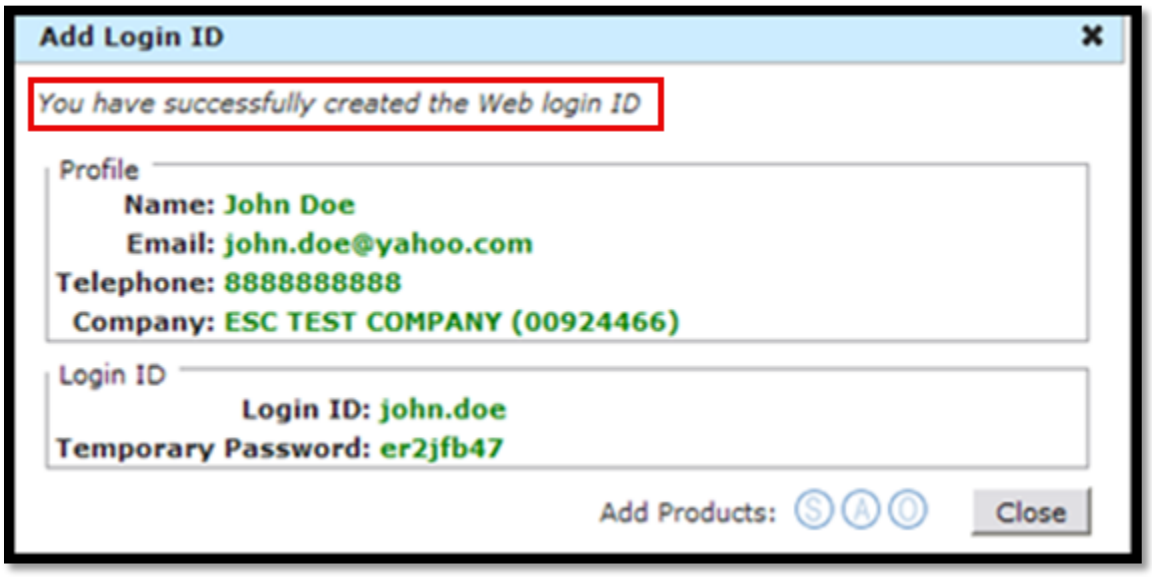
1. Enter a **Login ID** of your choosing.
   This field defaults to the user's email address for new profiles but may appear blank when adding a new Login ID to an existing profile.

Tip

The Login ID does not have to be an email address. Also, if you have or plan to have multiple Login IDs, you can add a number at the beginning or end, a specific word, or other identifier of your choosing to help differentiate your Login IDs. This may be helpful for memory, if you have multiple accounts or products with specific roles.



2. Next, click **Add**.
   You are provided with a confirmation message that displays your newly created Login ID as well as a temporary password, which is sent to the email address associated with the user's profile.

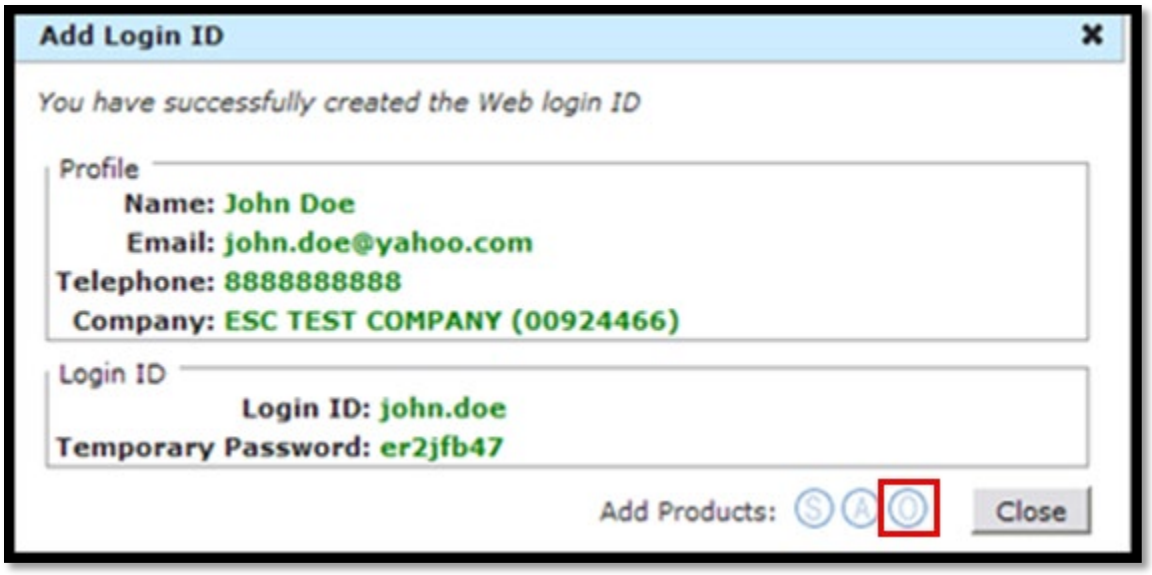


Provisioning Roles

To provision roles for a new or previously established Login ID, follow the steps below.

Procedure

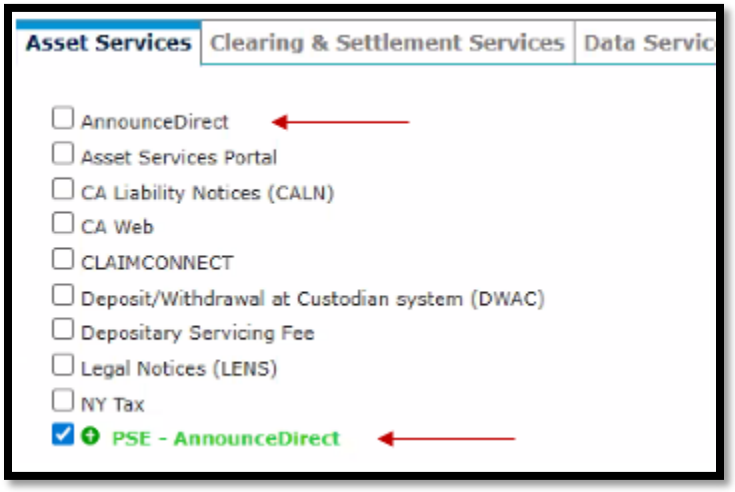
1. For a newly created Login ID, click the **O** to view the Product list.
   This automatically opens the **Add/Modify Entitlements** screen.



For a previously established Login ID, from the CRS home screen visit **Profiles** → **Search Profiles**. Once you've searched for the desired Login ID, click the **O**, and select the **Add/Modify Entitlements** button.



2. From the **Asset Services** tab, select the checkbox beside the desired product.
    - Production environment: **AnnounceDirect**
    - Testing environment: **PSE - AnnounceDirect**



Note
Products are grouped by business lines, e.g. “Asset Services.”
The products you see may be different from these screenshots; you only see the business lines and products that you have available as a SAC.

3. Now that you’ve selected your product, you can select your level of access (Role) for your agent ID (Account).

ROLE:
Click the drop-down arrow beside **Roles** and make your selection from the list, as referenced below. For the testing environment, these include the suffix PSE.

- ANNDIRECT Redemptions Read Only Agent
- ANNDIRECT Redemptions Supervisor Agent
- ANNDIRECT Redemptions Update Agent

Note
Refer to the Roles section of this document for detailed descriptions.

ACCOUNT:
The role that you select applies to the **Account** number (i.e. Agent ID) selected.

If you have multiple account options listed, you may optionally select any combination of them to apply that same role evenly across the accounts (refer to Scenario A, below).

Note
To ensure your access works correctly, only provision one of these roles per Login ID, as the level of access for various roles may conflict. If you require additional roles, you'll need to create another Login ID.

For guidance on provisioning multiple access for one user, please review allowable scenarios below:

Scenario A (Most common)

A single Login ID to apply the same role across multiple account numbers.

Same **Login ID** | Separate **Accounts** | Same **Role**

- john.doe | 12345000 | ANNDIRECT Redemptions Update Agent
- john.doe | 12345001 | ANNDIRECT Redemptions Update Agent
- john.doe | 12345002 | ANNDIRECT Redemptions Update Agent

Scenario B (Uncommon, allows for flexibility)

Separate Login IDs to apply separate roles across the separate accounts.

Separate **Login IDs** | Separate **Accounts** | Separate **Roles**

- john.doe.read | 12345000 | ANNDIRECT Redemptions Read Only Agent
- john.doe.update | 12345001 | ANNDIRECT Redemptions Update Agent
- john.doe.supervisor | 12345002 | ANNDIRECT Redemptions Supervisor Agent

Scenario C (Rare, can be useful for testing in PSE)

Separate Login IDs to apply separate roles across the same account.

Separate **Login IDs** | Same **Account** | Separate **Roles**

- john.doe.read | 12345000 | ANNDIRECT Redemptions Read Only Agent
- john.doe.update | 12345000 | ANNDIRECT Redemptions Update Agent
- john.doe.supervisor | 12345000 | ANNDIRECT Redemptions Supervisor Agent

4. Once you have selected the appropriate roles and accounts, click **Confirm** in the lower right corner of the product list window.



5. The screen displays your entitlement selections for you to view and double check. If you are satisfied with your selection(s), click **Submit** in the lower right corner of the product list window.
   The Login ID is now provisioned with the appropriate access.



AnnounceDirect Roles

Refer to the chart below when provisioning entitlements for the production or testing environment (PSE).

Agent Roles

Note

As a reminder, agent users within the AnnounceDirect application can only access events associated with the account numbers (agent IDs) attached to their Login ID.

PERMISSIONS	ANNDIRECT Redemptions		
	READ ONLY AGENT	UPDATE AGENT	SUPERVISOR AGENT
Search and view agent queues and events.	✔	✔	✔
Create, modify, and cancel events.	–	✔	✔
Approve or Reject the creation, modification, and cancellation of events. (Applicable for Maker-Checker feature only)	–	✔	✔
Assign and Unassign events for your own user ID.	–	✔	✔
Unassign events from other user IDs.	–	–	✔
Access the Account Configuration screen to manage account-wide settings, such as enabling / disabling the Maker-Checker feature.	–	–	✔

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