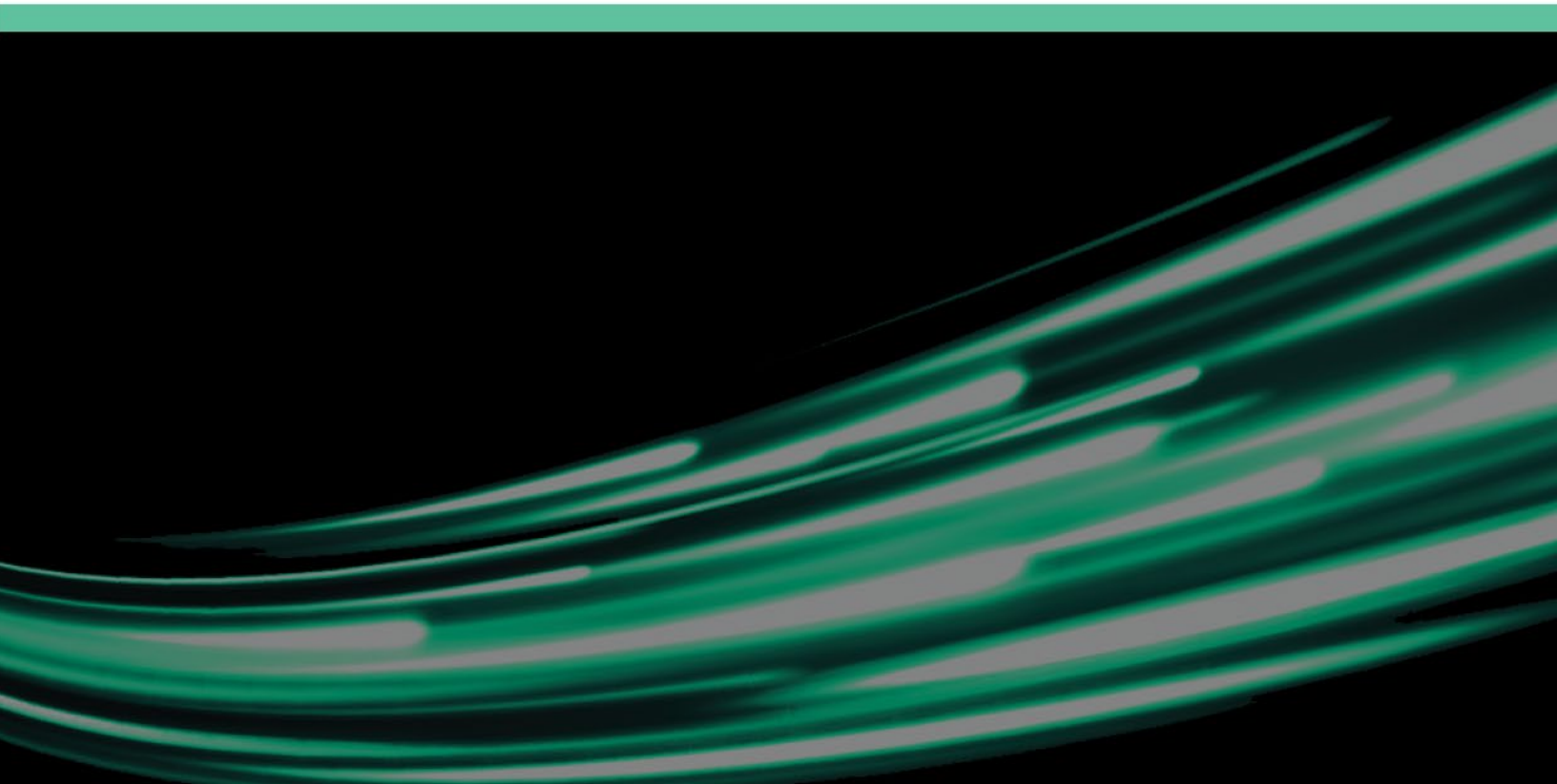
AnnounceDirect: Access Provisioning Guide

Date: 7/30/2026



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About

AnnounceDirect is an announcement portal that allows agents, issuers, and third parties to provide Corporate Action announcement information directly to DTCC's announcement and processing systems.

This document serves as a quick guide for Access Coordinators and Super Access Coordinators to provision access and entitlements to the AnnounceDirect (PSE) product for testing purposes.

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

CRS Profiles

Overview

Each portal user must obtain a profile. Profiles are unique by company and email address. You cannot create more than one profile for the same company and email address.

Profiles must have at least one Login ID associated with it. This Login ID lets the user access the products for which they are registered.

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

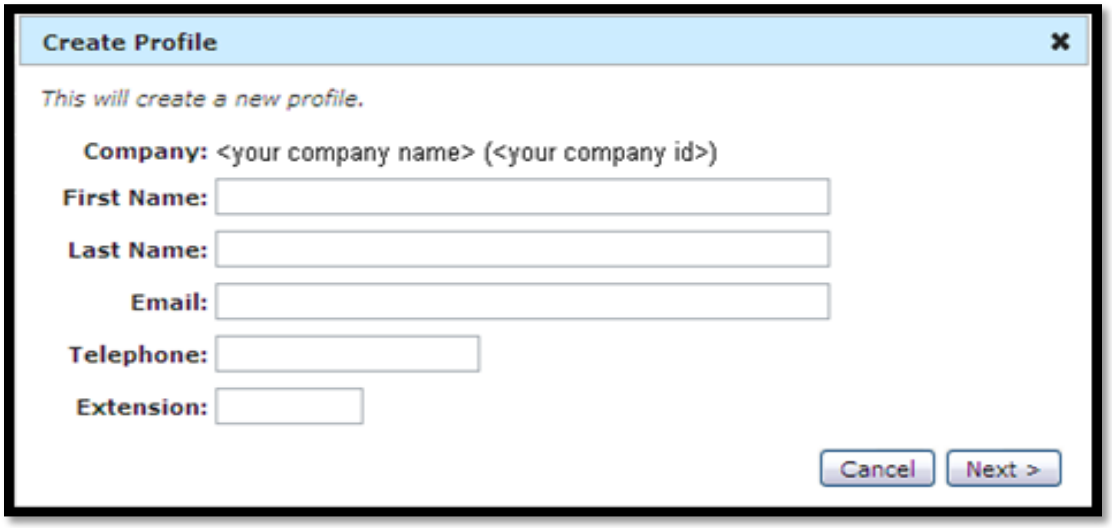
1. Log in using your credentials at https://myportal.dtcc.com
    - Prior to August 15th, 2026, please use https://portal.dtcc.com.
2. Navigate to the CRS tile.
3. Under **User Profiles**, select **Create Profile** (for new Login IDs) or **Search Profiles** (to add the product to an existing Login ID).
    a. To begin with a new Login ID, proceed to the next section, Create Profile.
    b. To add entitlements to an existing Login ID, skip ahead to Provisioning Roles.

Create Profile

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

Procedure

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

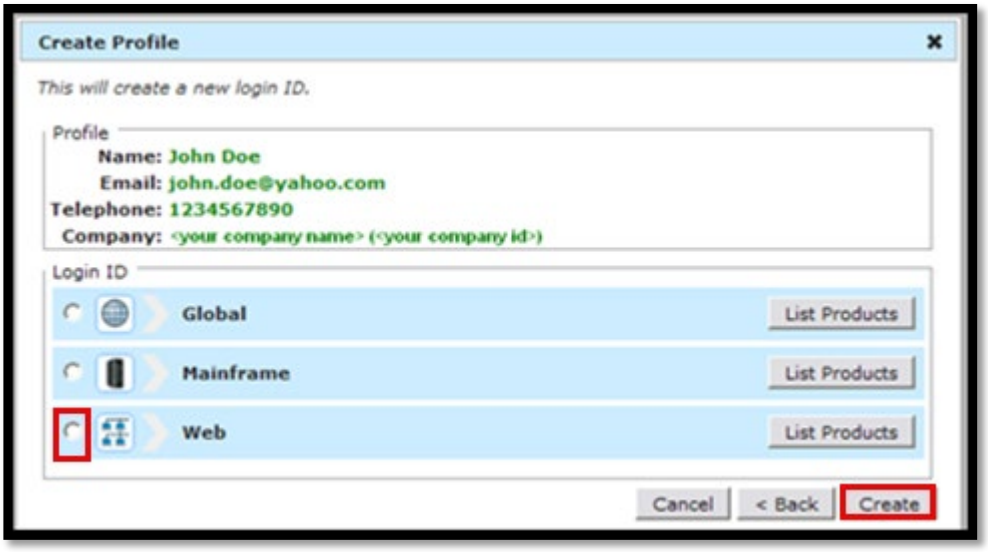


Note

If a profile already exists for the email address you entered, a warning message will display: "A matching profile already exists in CRS." You will *not* be allowed to 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, then you will be prompted to add the email domain to the list of your company's email domains.

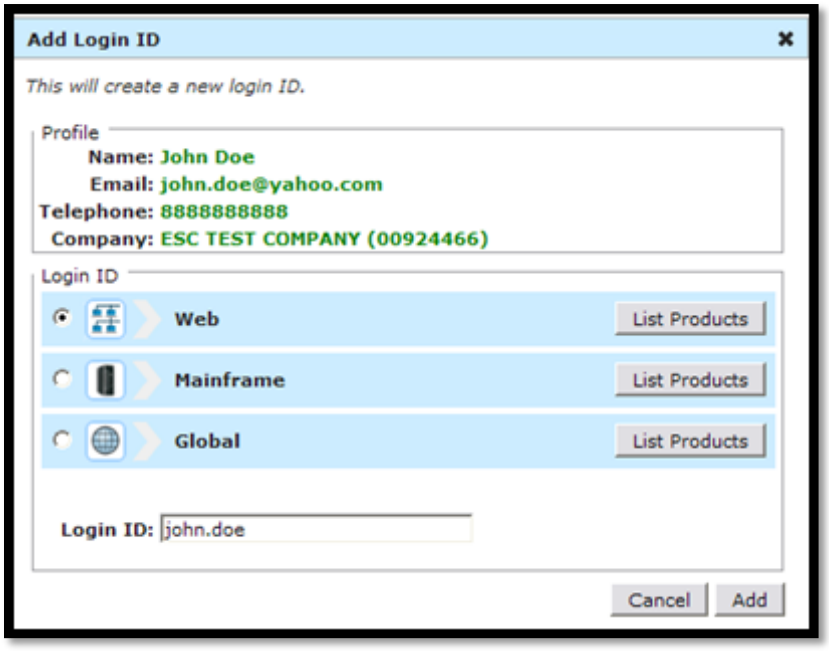
3. In this dialog box, select the radio button for **Web** and click **Create**.



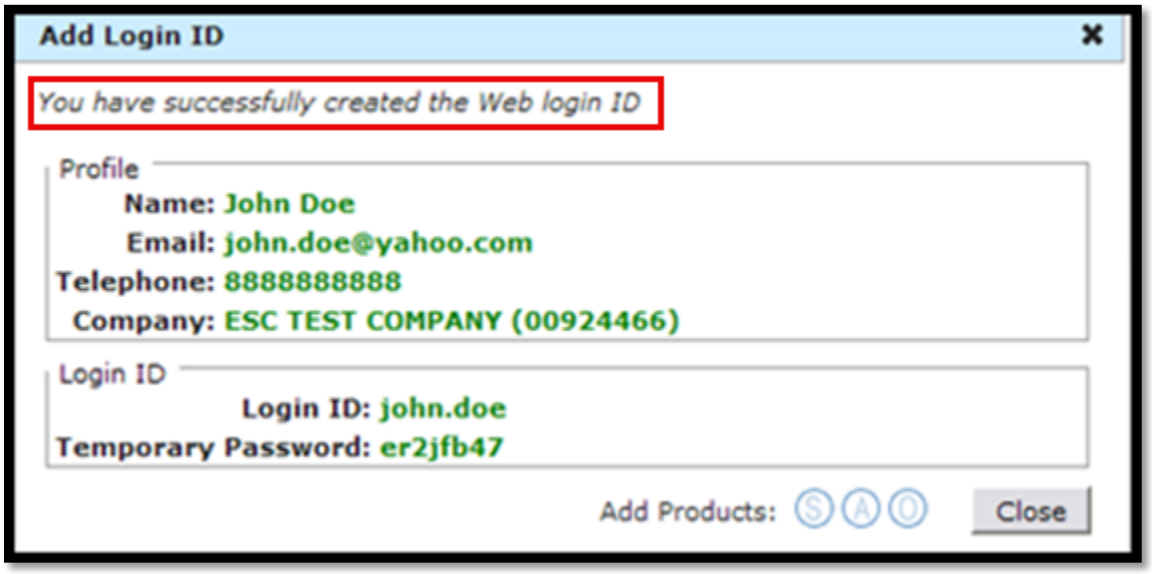
4. You can now create a Login ID.
   The **Login ID** field auto-populates with the user's email address for new profiles, but the ID is modifiable and can be customized with a naming convention of your choosing.

Note

You can modify the Login ID by adding a number at the beginning, etc. to help differentiate your Login IDs if you have multiple for different products. The Login ID does not have to be an email address.



5. Next, click **Add**.
   You are provided with the confirmed login ID and a temporary password, which is sent to the user's associated email address.

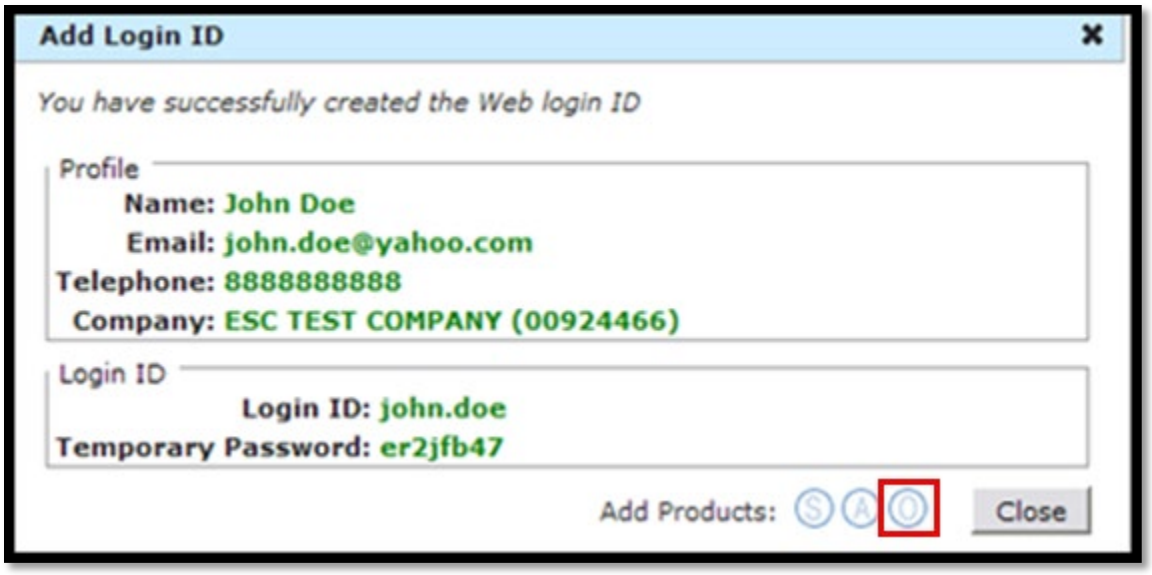


Provisioning Roles

To provision roles for a new or prior existing Login ID, follow the steps below.

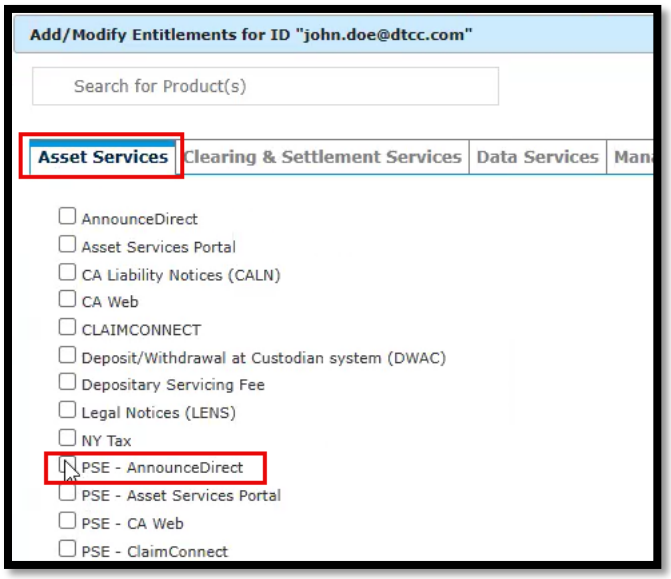
Procedure

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 prior existing 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 for the **PSE – AnnounceDirect** product.



Note

Products are grouped together into lines of business, e.g. “Asset Services.” To open a line of business, simply click on the name.

The products you see may be different from these screenshots. You will *only* see the “lines of business” and products that you have available as a SAC.

3. Next, click the drop-down arrow beside **Roles** and make your selection from the available roles:

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

If you have multiple accounts options, click the drop-down arrow for **Accounts** and select the appropriate account.

Note

Refer to the Roles section of this document for guidance on assigning entitlements.

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

5. Then, click **Submit** in the lower right corner of the product list window.
   The user is now provisioned with access to the **PSE – AnnounceDirect** product.

AnnounceDirect Roles

Refer to the chart below when provisioning entitlements for the testing region (PSE).

Agent Roles

Users may only view and update events associated with their agent account number.

Product Role	Role Description
ANNDIRECT Redemptions **Read Only Agent** PSE	This user may: i. View and perform searches on agent queues and events.
ANNDIRECT Redemptions **Update Agent** PSE	This user may: i. View and perform searches on agent queues and events. ii. Create, modify, and cancel events. iii. Approve or reject the creation, modification, and cancellation of events. (Maker-Checker feature must first be enabled.)
ANNDIRECT Redemptions **Supervisor Agent** PSE	This user may: i. View and perform searches on agent queues and events. ii. Create, modify, and cancel events. iii. Approve or reject the creation, modification, and cancellation of events. (Maker-Checker feature must first be enabled.) iv. Access the Account Configuration screen to manage account-wide changes such as enabling / disabling the “Maker-Checker” feature for your organization.

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