

AnnounceDirect: Access Provisioning Guide

Date:

12/30/2025

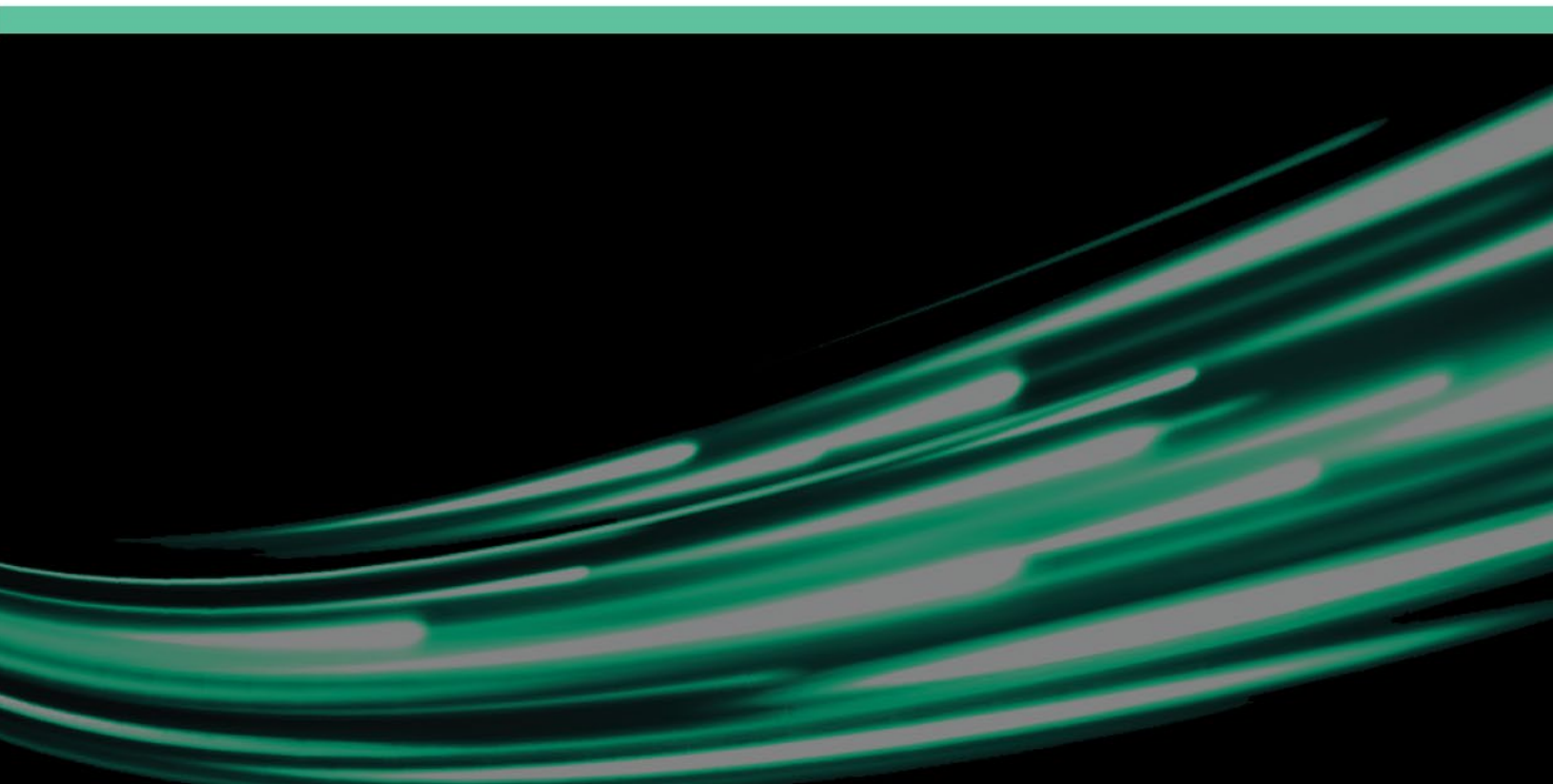


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About

[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 on the DTCC Learning Center.

Creating a Profile in CRS (Customer Registration System)

As the Coordinator, you will need to access the Customer Registration System product located within the MyDTCC portal.

1. Log into the MyDTCC portal using your portal credentials at <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. You may skip ahead to [Provisioning Roles](#) if you are adding entitlements to an existing login ID, which you can do by performing a search.
 - b. To start with a new login ID, proceed with the steps below.

User Profile

Each portal user must have 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.

Procedure

Follow the steps below to create a new user profile.

1. From the 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.

Create Profile [X]

This will create a new profile.

Company: <your company name> (<your company id>)

First Name:

Last Name:

Email:

Telephone:

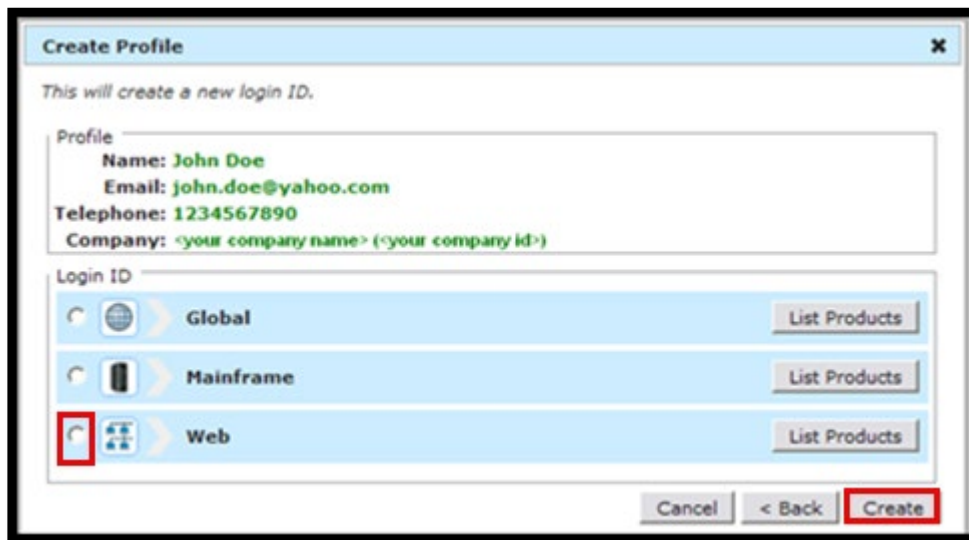
Extension:

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.

Add Login ID [X]

This will create a new login ID.

Profile

Name: John Doe
Email: john.doe@yahoo.com
Telephone: 8888888888
Company: ESC TEST COMPANY (00924466)

Login ID

Web

Mainframe

Global

Login ID:

- 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.

Add Login ID [X]

You have successfully created the Web login ID

Profile

Name: John Doe
Email: john.doe@yahoo.com
Telephone: 8888888888
Company: ESC TEST COMPANY (00924466)

Login ID

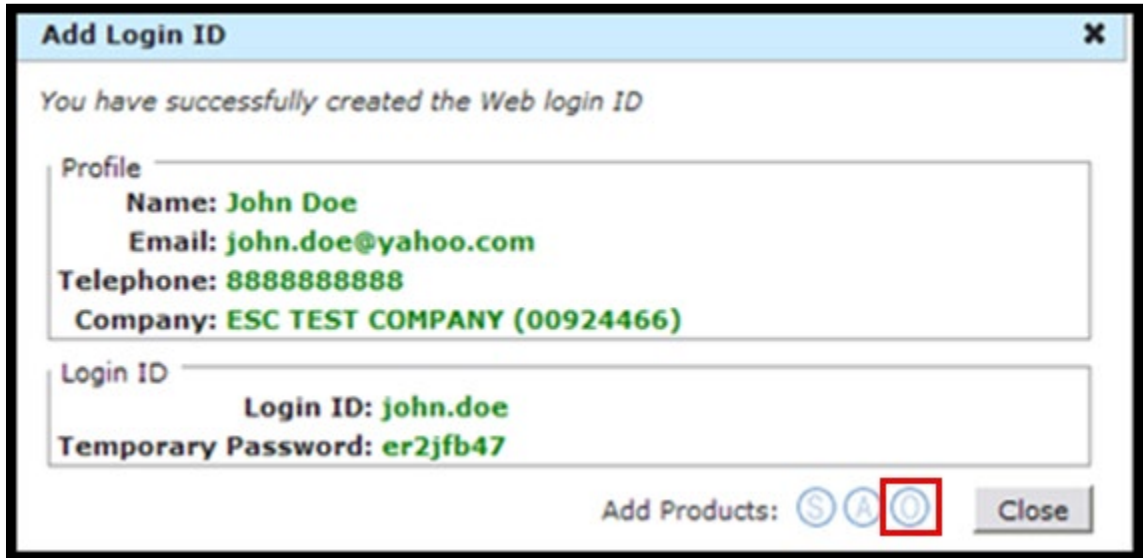
Login ID: john.doe
Temporary Password: er2jfb47

Add Products:

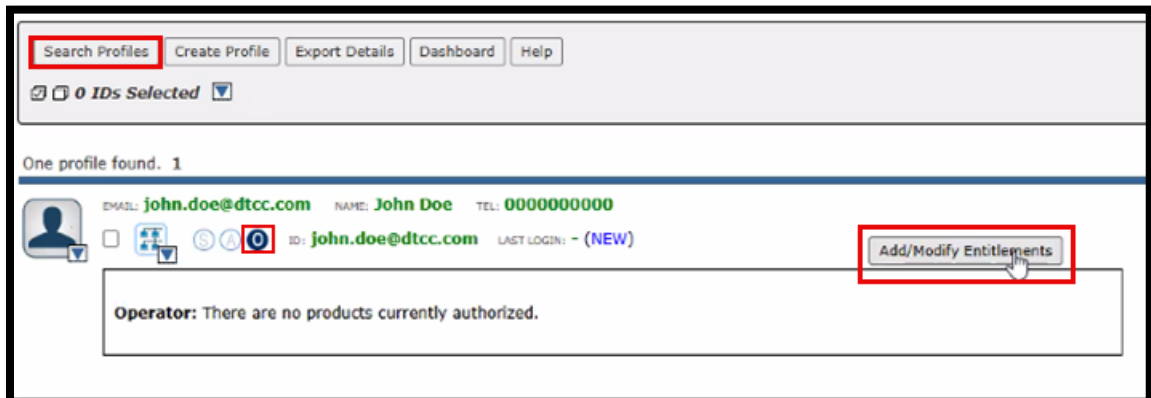
Provisioning Roles for a Login ID

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 main CRS screen you will first need to go to **Profiles** → **Search Profiles**. Once you've searched for the desired Login ID, click the **O**, and select the **Add/Modify Entitlements** button.



- From the **Asset Services** tab, select the checkbox for the **PSE – AnnounceDirect** product.

Add/Modify Entitlements for ID "john.doe@dtcc.com"

Search for Product(s)

Asset Services | Clearing & Settlement Services | Data Services | Man

- AnnounceDirect
- Asset Services Portal
- CA Liability Notices (CALN)
- CA Web
- CLAIMCONNECT
- Deposit/Withdrawal at Custodian system (DWAC)
- Depository Servicing Fee
- Legal Notices (LENS)
- NY Tax
- PSE - AnnounceDirect**
- PSE - Asset Services Portal
- PSE - CA Web
- PSE - ClaimConnect

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.

- Next, click the drop-down arrow beside **Roles** and make your selection.

PSE - AnnounceDirect

Corporate Action Agent Portal to allow agents/issuers to create corporate action announcements in the PSE/UAT environment.

Roles Accounts

- ANNDIRECT Portal Issuer PSE
- ANNDIRECT Portal Read Only Agent PSE
- ANNDIRECT Portal Supervisor Agent PSE
- ANNDIRECT Portal Update Agent PSE

PSE - A

PSE - C

PSE - C

Cancel Submit

In the below example, we've chosen the Update role for agents.

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.

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

- 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).

Product Role	Role Description
ANNDIRECT Portal Issuer PSE	<p>This role is for ISSUERS only (who do not also act in the capacity of Agent).</p> <ul style="list-style-type: none"> The user is provided with the ability to create a new event and upload PDF documents. Cannot view queues or perform a search.
ANNDIRECT Portal Read Only Agent PSE	<p>This role is for AGENTS only.</p> <ul style="list-style-type: none"> The user is provided with read-only access to all non-supervisor views.
ANNDIRECT Portal Update Agent PSE	<p>This role is for AGENTS only.</p> <ul style="list-style-type: none"> The user has both view and update access, providing for most functionality of the application aside from supervisory/admin capabilities. The user may view agent queues, perform searches, and view uploaded documentation from other members of the same agent ID. If the Maker-Checker feature is enabled, the user is considered the “Maker” (initiator – first level) when creating/modifying/canceling event announcements.
ANNDIRECT Portal Supervisor Agent PSE	<p>This role is for AGENTS only.</p> <ul style="list-style-type: none"> The user is provided with both read-only and approval access to all screens. The user may view agent queues, perform searches, and view uploaded documentation from other members of the same agent ID. If the Maker-Checker feature is enabled, the user is considered the “Checker” (verifier – second level) when approving the creation/modification/cancellation of event announcements. Users with this role have admin capability, which includes enabling / disabling the Maker-Checker feature within the application. <p><i>*Note: In order for this user to make updates to events, you must additionally provision the “Update Agent” entitlement.</i></p>

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