# Guidance on completing an IRM-003 to Add/Modify Toolkit Permissions

To conform to access requirements, Customer Service Toolkit (CST) permissions need to be requested through the IRM-003.

Below are instructions on how to complete the IRM-003 to add or remove Toolkit access for **NRCS or District employees who already have computer/email access**. If the user does not have computer or email access, please complete "**IRM-003 for New NRCS Employees**."

Please note that highlighted sections should be completed, if applicable.

## Instructions and IRM-003 Form

1. At the "**PIA Home page**", select "**PIA NRCS Employees**", select "**Computer Access for NRCS & District Employees**" or go to:

   http://www.pia.nrcs.usda.gov/intranet/it/isspoc.html

2. Print out the Instructions "**Toolkit** - **Instructions to add/modify Toolkit Permissions.**"
3. Click on "**Toolkit** - **IRM-003 – Form to add/modify Toolkit permissions**". Save the file to your hard drive, rename the file using the format below.

"(LName)_(Action)_(DateIRM-003 Initiated)"

e. g. "Mikasa_AddToolkit_2012-01-12"

e. g. "Shishido_DeleteToolkit_2011-05-25"

**Page 1:**

1. Select "**New/Existing**"
2. Enter "**Date of Request**" at top left-hand corner of the page.
3. Fill out **Part I** of person requesting VPN access (**Employee/User Name, Nickname, Nickname/Preferred Name** (if applicable), **Position Title, and Phone)**
   a. **E-mail** – provide new email address if district employee or if email address is not in the usual format.
      i. Usual format = first.lastname@)
         - joseph.farmer@hi.usda.gov
      ii. Unusual format
         - Joe.farmer@hi.usda.gov
      iii. District format
         - Joseph.farmer@hi.nacdnet.net or
         - Joe.farmer@pb.nacdnet.net

4. Under **Region(State**, enter "**PI**"
5. **Site ID** and **Office ID**
   - For local listing of PIA offices, see "Office InformationProfile" at http://www.pia.nrcs.usda.gov/intranet/it/isspoc.html.
   - To obtain **Site ID** (4-digits) and **Office ID** (4, 5 or 6 digits) numbers: (in addition to Office ID #, please list name of office)
     a. Go to: http://www.pia.nrcs.usda.gov/
     b. Click on "**Contact Us**" tab
     c. Scroll down page to "**Other Links**" and click on "**USDA Service Center Locator**"; click on "**Click here**"
     d. Click on appropriate "state" (HI, GU, AS, FM, PW, MP, MH), then click on appropriate "county"
     e. Click on "**Complete Office Listing**" tab
     f. Find Site ID (4-digits) and Office ID (4, 5 or 6 digits) numbers for a particular office
6. Access Required / **Type of User**:
   a. Select "**New Federal**" – User currently does not have computer or email access.
   b. "**Existing Federal**" – User has computer and email access.
   c. "**New Affiliate**" – District Employee that currently does not have computer access.
   d. "**Existing Affiliate**" – District Employee who has computer and email access.
   e. "**New Contractor**" -
   f. "**Existing Contractor**" -
7. Active Directory Account (For new users)
   a. For New Users, select "With Email"
   b. For existing users, no selection is needed
8. **Target Date for Access**
   a. Enter the date access is needed in the blank space provided. If the date is in the past, enter the current date.
   b. In "Justification" on page 2, enter the actual start date and any other pertinent information.
9. **Request for a Personal Information Change (Name, Phone, etc.)**
   a. If name or phone change is needed, select "**Yes**" and enter the name or phone information.

b. If not, select "**No**".

c. Provide additional details in the space provided below.

10. **User Transferring to a different Agency**

    a. If the user is transferring to another agency, select "**Yes**" and provide details requested

    b. If not, select "**No**".

11. **User Changing Locations but staying in the same Agency**

    a. If the user is transferring to another NRCS office, either within the same state or to another state, select "**Yes**" and provide details requested.

    b. If not, select "**No**".

12. **Active Directory Change being requested**

    a. Select "**Yes**" if you need a "**Removal**", "**Email Address Change**", "**Email 'User' Group(s) Added to**", E**mail 'User' Group(s) Removal From**", or "**Other Active Directory Changes**".

        - New or existing users may be added to "**Email 'User' Groups Added To**", removed from "**Email 'User' Group(s) Removed from**" or an "**Email Address Change**" may be needed when a name change is involved.
        - A "**Removal**" is needed when the employee is no longer employed with NRCS or by the District.

    b. Select "**No**" if no changes are needed.

    c. Provide details in the space provided below.

**Page 2:**

13. **Will the User need General Access?**

    - Select "**Yes**",if you need **VPN**, **SAAR POC Account Untitlement**, **shared Drive Permissions or Toolkit Permissions**.
    - Select "**No**", if no access is needed and ignore the questions in this section.

    a. **VPN/Dialup Access** – For users who Telework or need access during Travel.

        i. Select "**Add Access**" if VPN access is needed.

            - Provide justification in the "P**rovide Justification or additional details for the Access requeste**d".

        ii. Select "**Delete Access**" to remove access.

    b. **SAAR POC Account Entitlement** – for ISSPOCs ONLY.

c. **Remedy Support Groups** – For Remedy Help Desk only

d. **SafeBoot** – Users need to explain why they need to be exempt from having SafeBoot on their system. (Exemption is rarely granted)

e. **Local Workstation Admin** – User requires ability to load software. A “good” justification is needed before PIA or ITS will grant Local Workstation Admin permissions. (Exemption rarely granted)

f. **Share Drive Permission** – “Share Drive Permission” refers to obtaining permissions to another Service Center, Area Office or State Office other than the user’s own Service Center/Area/ or office.

   i. If user is leaving the state and has Shared Drive permissions to another office other than the office the user is located at, select “**Remove Permissions”**.

   ii. If an Area or State Office user needs access to a field office to review documents on a field office’s f or s drive, select “**Add Permission**”. Provide justification in the space provided. Include the drive and path.

**g. Other Elevated Access**

***Check the appropriate box if you need to add/update or remove Toolkit Permissions.**

   i. If other elevated access (other than what is mentioned above) is needed, select “**Add Permissions**” and provide justification in the window below.

   ii. If other elevated access has been granted (other than what I listed above) and the user is no longer utilizing it, select "**Remove Permissions**”.

**h. Toolkit User Group Membership**

   i. If a user needs Toolkit permissions, additional field office access or an elevated role; select “**Add Permissions**”.

   ii. Toolkit Permission Level Requested – select the appropriate Toolkit permission.

      - **All** – Toolkit User Basic All – User able to “change county”, rename folders and consplan names, etc. – This permission is granted only when user reaches “Advanced” status.

      - **R/W** – Read/Write permissions – User is able to edit Toolkit folders and check files back in. (Field Office Users)

- **RO** – Read-Only permissions – User can check out read-only files. (Area and State Office Users)
- **Coordinator** – Toolkit Coordinator Permissions – State role.

iii. **County/Counties and Service Centers** – List the county / counties or service center(s) that the user needs access to.

iv. If the user no longer requires access to Toolkit, leaving NRCS or is transferring to another NRCS office, select "**Remove Permissions**".

**i. Provide Justification or additional details for the Access requested.**

i. Include justification. Edit/revise according to your situation.

14. **Verification of Least Privilege / Need to Know**

a. * A **digital signature** of **State or Area Toolkit Coordinator** is required under "**Signature of Supervisor/Office Manager/Contracting Rep**"

- As State or Area Toolkit Coordinator, you have the ability to determine if additional/ elevated permissions is rational.

Note: Once the form is digitally signed, everything above the signature is not editable.

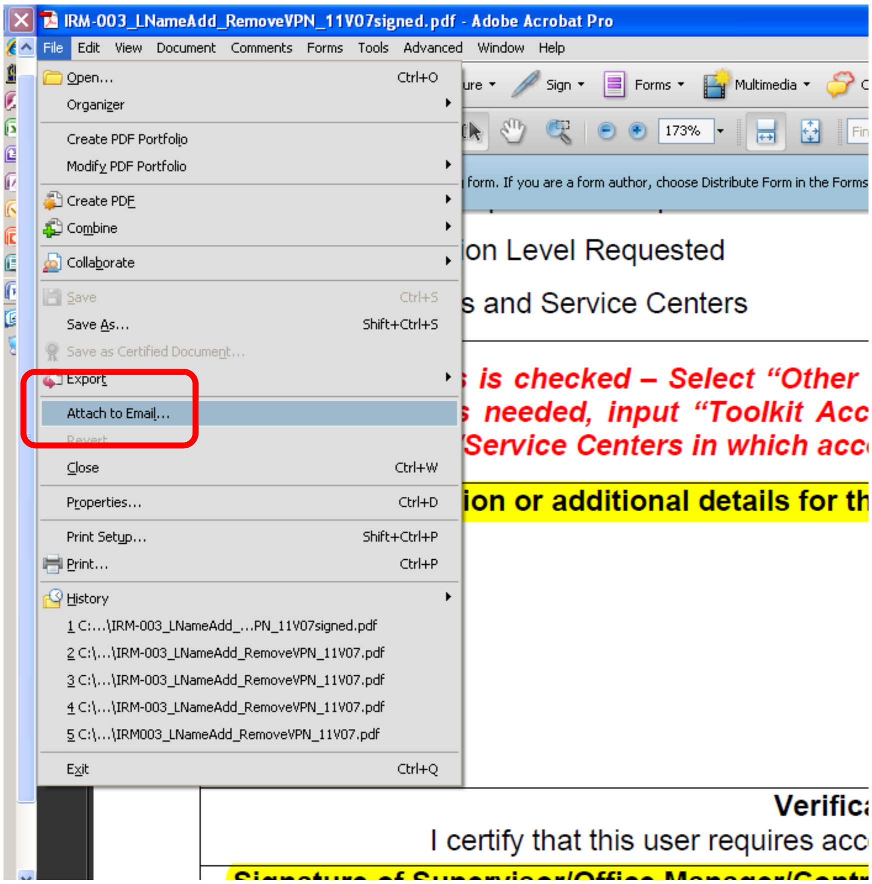
*For instructions on creating a digital signature, go to the PIA website at: http://www.pia.nrcs.usda.gov/intranet/it/isspoc.html

**Printed and scanned copies of the IRM-003 are not accepted. Only electronically signed and forwarded forms will be processed.

b. "**Supervisor/Office Manager/Contracting Rep Email Address**"

i. Enter the email address of the person signing the document.

15. Save the file and email as an attachment.
    a. Select “**File**” / “**Attach to Email**”
    b. Send the file to the AIMS Specialist with a cc to the HR Specialist and the Assistant Director for Operations.




Part II and III - to be completed by HR Specialist

Part IV – to be completed by ISSPOC creating the SAAR ticket