

BUREAU OF THE FISCAL SERVICE

Converting to PIV/CAC Authentication for OTCnet

OTCnet Connection Guide

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Introduction

This document details the steps required for a user to link their Personal Identity Verification/Common Access Card, or PIV/CAC certificate to their Fiscal Service Single Sign-On (SSO) account and provides instructions for using their PIV/CAC credentials to log in to OTCnet.

Users who do not currently have a PIV or CAC credential do not need to take action at this time. Users should escalate internally with their agency if the user is required to obtain a PIV or CAC credential.

Troubleshooting—if a user is unable to log in to OTCnet with their PIV/CAC credentials, assistance information is available in **Part 3. Troubleshooting: If you are unable to log in to OTCnet with your PIV/CAC**

To learn more about this initiative, visit the OTCnet PIV/CAC webpage: https://www.fiscal.treasury.gov/otcnet/log-into-otcnet-using-your-pivcac-credentials.html.

Part 1. Linking a user PIV or CAC Certificate to the User Fiscal Service SSO Account

- If you previously linked your PIV/CAC certificate to a Fiscal Service SSO Account, skip this section and proceed to Part 2. Logging in to OTCnet using your PIV/CAC Credentials.
- You must have an active Fiscal Service SSO account for OTCnet Online to link a PIV/CAC certificate.
- You can link a PIV/CAC certificate from any location with internet access using your agency-provided workstations. You do not have to be physically located at your agency.

Follow the steps below to link your PIV or CAC credentials to your Fiscal Service SSO account.

- 1. Using your browser, navigate to the CASS application: <u>https://piv.treasury.gov/cass/</u>.
- 2. A **Windows Security** box displays and prompts the user to select the appropriate certificate, see *Figure 1. Select a Certificate Window*. You may have to select **More Choices** to view your other certificate choices. Choose the correct certificate used for authentication and enter the associated PIN for the credential.

Windows Security	×
Select a Certificate	
Site piv.treasury.gov needs yo	our credentials:
Timothy User Issuer: Federal Progr	am Agency Name
Valid From: 1/25/202	22 to 1/25/2025
Click here to view cert	ificate properties
More choices	
ОК	Cancel



- 3. If multiple certificate selections are available and the user is unsure which certificate to choose, complete the following:
 - Click the **Click here to view certificate properties** hyperlink. The Certificate window displays.
 - Click the **Details** tab, see *Figure 2. Certificate Window*.

Certifica	nication Path ite Information
This certificate • Proves you • 2.16.840.1 • Smart Card	is intended for the following purpose(s): ur identity to a remote computer 1.113839.0.6.10.2 d Logon
Issued to:	Timothy User
Valid from You have a	 1/25/2022 to 1/25/2025 private key that corresponds to this certificate.
	Issuer Statement

Figure 2. Certificate Window

• The **Details** tab displays. Scroll down and select the *Enhanced Key Usage* option as shown in *Figure 3. Certificate Enhanced Key Usage*. *Client Authentication* displays within the lower display window when the correct certificate is selected.

Cardificanta		~
Lertificate		~
General Details Certification P	ath	
Show: <all></all>	~	
Field Authority Key Identifier Certificate Policies CRL Distribution Points Subject Alternative Name Subject Key Identifier Enhanced Key Usage Key Usage	Value KeyID=8c3d5409c4 [1]Certificate Policy: [1]CRL Distribution RFC822 Name=ti 7f4da857ff9c6dcdf3 Client Authenticatio Digital Signature (80) 402891be60c6f6a4a	•
Client Authentication (1.3.6.1 Smart Card Logon (1.3.6.1.4.	.5.5.7.3.2)	ζopy to File
		ОК

Figure 3. Certificate Enhanced Key Usage

 Ensure the selected certificate includes *RFC822 Name=your email address* in the *Subject Alternative Name* certificate field, see *Figure 4. Certificate Subject Alternative Name*.

💭 Certificate		X
General Details Certification	Path	
<u>S</u> how: <all></all>	~	
Field Authority Key Identifier Certificate Policies CRL Distribution Points Subject Alternative Name Subject Key Identifier Enhanced Key Usage Key Usage Thumbprint RFC822 Name=timothy.user Other Name: Principal Name=timothy.u	Value KeyID=8c3d5409c4 [1]Certificate Policy: [1]CRL Distribution RFC822 Name=ti 7f4da857ff9c6dcdf3 Client Authenticatio Digital Signature (80) 402891be60c6f6a4a @federalagency.gov	
	Edit Properties	<u>C</u> opy to File
		ОК

Figure 4. Certificate Subject Alternative Name

4. A PIN prompt displays once the correct certificate is chosen. The user enters their Smart Card PIN. See *Figure 5. Enter PIN Window*.

Windows Security	×
Smart Card	
Please enter your digital signa	ture PIN.
Click here for more i	nformation
ОК	Cancel

Figure 5. Enter PIN Window

 The CASS Application Home page appears in your browser. Click the I need to link my PIV or PIV-I cert to an existing Fiscal Service SSO account hyperlink. See Figure 6. SSO Page.

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account
2

- If you receive the message "Your credential has already been linked to an SSO account. Your access should already be in place" your PIV/CAC credentials may already be linked to your SSO account due to another Fiscal Service or Treasury application. Continue to Part 2 of this document to confirm you can use your PIV/CAC credentials to log in to OTCnet.
- If you receive the message "Unable to decode certificate. This is likely not an authentication certificate." The certificate you selected cannot be used; this is possibly because it is not an authentication certificate, or it may not be a PIV, PIV-I, or CAC certificate. Ensure your PIV, PIV-I, or CAC is inserted into your workstation's card reader and repeat steps 1 through 4, ensuring that you select a valid PIV, PIV-I or CAC authentication certificate (per steps 2 through 4).
- 6. For PIV/CAC certificates without an email address, enter your name and email address and click Submit, see Figure 7. CASS Email Registration Page. You will receive an email with a link to register. Click this link or enter it into your web browser. If your certificate has an email, CASS will automatically skip to the next step.

Enter your person	al information.
*Legal First Name:	
Legal Middle Name:	
*Legal Last Name:	
*Official Email Address	Submit

Figure 7. CASS Email Registration Page

7. Enter your Fiscal Service SSO **UserID** and **Password** and click **Submit**. See *Figure 8. SSO User Log in Page*.

Manage Identity/Account	Contact		
Enter the userID and pass	word for the SSO account y	ou wish to link to your PIV (or PIV-I credential.
UserID:			
Password:			
Submit			

Figure 8. SSO User Log in Page

Once logged in to CASS, a message displays: "Your request has been submitted successfully", see Figure 9. Request Successfully Sent Page. An email is then sent to the user email address associated with the Fiscal Service SSO profile. The email contains "Treasury Fiscal Service SSO Certificate Activation Notification" in the subject line.



Figure 9. Request Successfully Sent Page

8. Once the email is received, log in to the Fiscal Service Application using your PIV/CAC credentials.

Part 2. Logging in to OTCnet using your PIV/CAC Credentials

Once your PIV or CAC certificate is successfully linked to your Fiscal Service SSO account, log in to OTCnet using your PIV/CAC:

 Use Microsoft Edge or Google Chrome to access OTCnet Production at: <u>https://www.otcnet.for.fiscal.treasury.gov/otcnet/views/home.xhtml</u>. See Figure 10. Fiscal Service SSO Log in Page.

On December 10th, 2022, the OTCnet URL domain changed from **fms.treas.gov** to **for.fiscal.treasury.gov**. This change will not impact your current log in process. User IDs, Passwords, and PIV/CAC credentials will remain the same.

On the log in screen, ensure that the yellow **Log in to** box contains the full URL, see red arrow in *Figure 10. Fiscal Service SSO Log in Page*.

RUREAU OF THE Fiscal Service	Forget your Password? Forget your User 12? Register 💡
Select in autoremotivition memory Log In using your Fiscal Service I SSO User ID and Password SscurID Token Pti Certificate	To log in using year Flexal Service Single Sign On User ID and Password. By logging in with your PDV, SecurID, or User ID and Password, you advowledge and agree that you have read, understand, and agreed to abide by the <u>Bules of Behavior</u> . User ID: Password: Log In Reset <u>Forgot your Dassword</u> ?
WARNING WARNING WARNING NOTE	Ku have accessed a U.S. Government information system, which includes (1) this computer (2) his rehowl; (3) all computer connected to this network, and (4) all devices and storage media attached to this tehrovir or to a computer on thin network. U.S. Government, the discussion of the processing of Oficial U.S. Government information systems are of this information types in prohibited many subject your to disciplinary actions are valid as of and or minimal peratives. All data contained on U.S. Government information systems is and by the U.S. Government the U.S. Government information systems is and by the U.S. Government information systems is and by the U.S. Government and may, for the purpose of protecting the rights and property of the U.S. Government, be monitored, intercepted, excited, escited, caped, or capital is and advices of or and for any lashful provinces purposes at whites, the Star Star Star Star Star Star Star Star
	Accessibility Contacts Privacy, Policy Rules of Behavior U. S. Department of the Treasury - Bureau of the Fiscal Service

Figure 10. Fiscal Service SSO Log in Page

- a. Click the PKI Certificate hyperlink, see *Figure 10. Fiscal Service SSO Log in Page*. You will be prompted to select your PIV/CAC authentication certificate.
- b. Select your PIV/CAC certificate and click **OK** to log in to OTCnet. You may be prompted to enter your PIV/CAC PIN before the log in process completes. Once successfully logged in, you can use your PIV/CAC credentials to log in to OTCnet in the future. The process is complete and no additional steps are required.

If you receive an error while attempting to log in with your PIV/CAC, continue with **Part 3**. **Troubleshooting:** If you are unable to log in to OTCnet with your PIV/CAC.

Part 3. Troubleshooting: If you are unable to log in to OTCnet with your PIV/CAC

A. 403 Error Message When Logging in to OTCnet with a PIV/CAC

If you receive the message, "The website declined to show this webpage / HTTP 403" or "Forbidden / You are not authorized to access the requested resource", follow the steps below:

1. In the browser address bar, delete all the characters after "home.xhtml".

You should see the characters **%3E%3Cbody%20bgcolor=** or **><body%20bgcolor=**. Delete these characters from the address bar and press the **Enter** key on your keyboard.

- 2. You should now see the OTCnet home page. If you see the log in screen instead, your session has timed out; click the PKI Certificate hyperlink and log in using your PIV/CAC credentials again and you should see the OTCnet home page.
- Bookmark the URL <u>https://www.otcnet.for.fiscal.treasury.gov/otcnet/views/home.xhtml</u> and use this URL for future OTCnet log in.

B. Validation Authority Error

If you receive a "*Validation Authority*" error or other errors related to your certificate when attempting to log in to OTCnet using your PIV/CAC credentials, follow the steps below:

Note: The steps below only apply to validation errors and authentication errors relating to certificates.

- 1. Take a screenshot of the certificate error when attempting to log in to OTCnet with your PIV/CAC credentials.
- Email <u>FiscalService.OTCChannel@citi.com</u> and provide a description of your workflow with the screenshot from the previous step. The OTC Support Center Team will address your inquiry. They can also be reached by phone at 866-945-7920.

C. OTCnet Server Does Not Recognize PIV/CAC Certificate

If you receive a "**Validation Authority**" error or an error was caused by the OTCnet server not recognizing your PIV/CAC certificate issuer, your PIV/CAC certificate's issuer may not yet be supported by the Treasury Web Applications Infrastructure (TWAI) for authentication.

To determine if this is the case, email your public PIV or CAC certificate to <u>FiscalService.OTCChannel@citi.com</u>. To do this, locate and export your **public end-entity authentication certificate** by completing the following steps:

- 1. With your CAC/PIV card inserted in your workstation, type **Internet Options** in the Windows search bar.
- 2. Select and launch the **Internet Options** application.
- 3. Click the **Content** tab at the top of the **Internet Properties** application.
- 4. Click the **Certificates** button.
- 5. Under the **Personal** tab on the **Certificates** screen, see the **Issued To** column and look for your name or Government ID.
- 6. Select the item with your name or Government ID, the **Authentication Certificate** may appear under the **Friendly Name** column. See *Figure 11. Certificates Window*.
- 7. Click **Export**, see *Figure 11*. *Certificates Window*.

	urpose:	<all></all>			
rsonal	Other Peop	ple Intermediate C	ertification Authorities	Trusted Root Certification	1
Issued	То	Issued By	Expiration Date	Friendly Name	
🗐 Jona	athan Pavlik	OCIO CA	7/10/2016	Authentication Certificat	
1					
•			Ш	•	
< [mport.		port	III ove	Advar	nce
< (mport. ertificati	Ex	port <u>R</u> em	III ove	} ∆dvar	nce
< Import. ertificati	Ex e intended p uthentication	port <u>R</u> em Nurposes n	III ove	۵. مراجع	nce

Figure 11. Certificates Window

8. The Certificate Export Wizard Start dialog box displays. Click **Next** >, see *Figure 12. Certificate Export Wizard Window*.

Certificate Export Wizard	•
	<text><text><text><text></text></text></text></text>
	< Back Next > Cancel

Figure 12. Certificate Export Wizard Window

9. The Export Private Key dialog box displays. Select the **No, do not export the private key** button and click **Next >,** see *Figure 13. Export Private Key in Certificate Export Wizard*.

Figure 13. Export Private Key in Certificate Export Wizard



10. The Export File Format dialog box displays. Select the **Base-64 encoded X.509 (.CER)** button. Click **Next >,** see *Figure 14. Export File Format in Certificate Export Wizard*.

Figure 14. Export File Format in Certificate Export Wizard

	Select the format you want to use:
	© DER encoded binary X.509 (.CER)
	Bage-64 encoded X.509 (.CER)
	© Cryptographic Message Syntax Standard - PKCS #7 Certificates (.P7B)
	Include all certificates in the certification path if possible
	Personal Information Exchange - PKCS #12 (.PFX)
	Include all certificates in the certification path if possible
	Delete the private key if the export is successful
	Export all extended properties
	\bigcirc Microsoft Serialized Certificate Store (.SST)
Lear	n more about <u>certificate file formats</u>

11. The File to Export dialog box displays. Click **Browse**, see *Figure 15. File to Export in Certificate Export Wizard*.

contineate Export means		
ile to Export		
Specify the name of the fi	le you want to export	
File name:		
Ene name.		Browse

Figure 15. File to Export in Certificate Export Wizard

12. Navigate to a folder you want to export your certificate file and type in your desired file name. Click **Save**, see *Figure 16. File Explorer Window.* On the File to Export screen click **Next**.

Cave As		
- Co	mputer + Local Disk (C:) + Temp +	- + Search Temp 🔎
Organize • Nev	v folder	E • 0
Program File Program Data Quarantine Recovery Sun System Volur Users Users Windows Network Network	ne Information	
File name:	EndEntitiyCert	•
Save as type:	Base64 Encoded X.509 (*.cer)	
Hide Folders		Save Cancel

Figure 16. File Explorer Window

13. A confirmation screen displays. Click **Finish**, see *Figure 17. Complete Certificate Export Wizard Window*.

Figure 17. Complete Certificate Export Wizard Window

Certificate Export Wizard		×
F	Completing the Certificate E Wizard You have successfully completed the Certificate wizard. You have specified the following settings:	xport Export
	File Name Export Keys	C:\Ter No
	Include all certificates in the certification path File Format	NO Base64
	•	Þ
	< <u>B</u> ack Finish	Cancel

14. A confirmation dialog box displays. Click **OK**, see Figure 18. Export Successful Window.

Certificate Export Wiz... The export was successful.

Figure 18. Export Successful Window

- 15. Navigate to the folder where you saved the file and rename the file extension of the file to **.txt**. Confirm that you want to change the file name extension and click **Yes** to confirm. If using the example above, the exported file is called **EndEntityCert.cer**, and it should be renamed to **EndEntityCert.txt**
- 16. Email <u>FiscalService.OTCChannel@citi.com</u> and attach a screenshot of the **EndEntityCert.txt** file. Note that this is a public certificate and it does not contain a private key.

Once the OTC Support Center Team receives the text file, the information will be provided to TWAI. TWAI will determine if your certificate's issuer is supported, or if there is another issue with the certificate preventing PIV/CAC authentication.

D. Additional Troubleshooting Assistance

For additional troubleshooting assistance, visit the *Fiscal Service Guide to Linking Fiscal Service SSO UserID to a SmartCard*: <u>https://www.fiscal.treasury.gov/files/reference-guidance/linking-fiscal-service-sso-piv-cac-guide.pdf</u>.

Thank you for converting to PIV/CAC for your authentication to OTCnet!