

STEPS FOR ONBOARDING

1. Determine your DTC Agent Number(s) and Legal Entity Identifier
 - Contact us at AnnounceDirectInquiries@dtcc.com for assistance
2. Submit [Super Access Coordinator Form](#), [DTC Agent Profile Form](#), & Signed [Operational Arrangements](#) to AnnounceDirectInquiries@dtcc.com
3. DTC creates Registration Company (RegCo) and provisions access to Super Access Coordinators
 - An update will be sent to Super Access Coordinators once Registration Company is created/updated
4. Super Access Coordinators provision access to individuals
 - [CRS User Guide](#)
 - [AnnounceDirect Access Guide](#)
5. Access application and review DTCC Learning Materials
 - <https://portal.dtcc.com/>
 - <https://dtcclearning.com/> (Use Portal Login Credentials)
6. Stand by for more communication on Training and Testing!

KEY TERMS AND CONSIDERATIONS

Agent Name

The name provided to DTC at the time the entity became a **DTC agent**. Recorded in MasterFile

Agent Number

The number assigned to the entity by DTC to represent their **agent book of business** at the time the entity became a DTC agent. Recorded in MasterFile

Registration Company Name

The name provided to DTC at the time the entity gained access to the **MyDTCC Portal**. Recorded in Customer Registration System

Registration Company Number

The number assigned to the entity by DTC to represent their firm **at the entity level**. Recorded in Customer Registration System. The Agent Numbers are tied to the Registration Company Name and Number within the Customer Registration System.

Super Access Coordinator Form

Establishes the individuals **authorized to act on behalf of the entity and responsible for managing access to DTCC systems** for the individuals at their firm

DTC Agent Profile Form

Used to establish or update the critical information tied to the firm **at the legal entity level**

The Business Name and Address within the DTC Agent Profile Form must match the Legal Entity Identifier exactly

The Business Name in the Super Access Coordinator Form must match the Legal Entity Identifier exactly

Only submit one set of forms per legal entity