Logging On and Self-Registering

The Home page displays when you first logon to the system. Unless otherwise noted all tasks described in this guide begin from the Home page. Access the Logon page using your organization URL address, supply your user ID and password, and the Home page opens. See your administrator for the URL address you use for the Logon page, as well as for information about your user ID and password.

Because this is an Internet browser-based application, you must have Microsoft Internet Explorer installed on your computer. You use the browser to access the Home page and all card management functions.

To use the card management system you must have a user profile set up, or, if you are an account holder, you can self-register by clicking the Not Registered link on the Logon page. If you are a new user, see your administrator about setting up a user profile.

This guide provides instruction for completing the following tasks:
- Logging on to the card management system
- Self-registering to use the system
- Adding an account
- Retrieving your password
- Changing your password
- Editing your user profile

To log on to the card management system

From your organization Logon page, you can log on to the card management system, self-register to use the system (if allowed for your organization), or have your password hint emailed to you.

1. Open your browser. The card management application is certified for Microsoft Internet Explorer versions 7 and 8.

2. Type the logon URL for your organization in the Address bar and press Enter. The Logon page displays in the browser window.
   **Tip:** Create a favorite or bookmark shortcut in your browser so that you can access the logon page without entering the URL.

3. Type your user ID and password in the appropriate fields.
4. Click **Log on**. One of the following occurs:

- The application Home page displays.
- If this is the first time you are logging on to the application (or if your Administrator recently reset your password), you must provide additional security information used for further verification and security.
- The additional security page displays and you must verify your identity.

**Providing additional security information**

Before you can log on to the application for the first time, you must provide answers to four security questions. This multi-level security measure will help to ensure continued privacy of confidential information along with your user ID and password. To keep your account secure, one of these questions may be asked when you attempt to log on to the system.

Pick a question from four sets of questions to compile your set of security questions and answers. Choose questions which you can answer without difficulty.

**Important:** Do not make up a false answer to the question, as you might not be challenged to answer the question for a long period of time. This is why it is important that you choose questions to which you will always remember the answer.

To specify your additional security questions and answers

1. From the first question list, select the question to which you can most readily remember the answer.

**Note:** The questions in each list have been selected so that the answer is only known to you. If other people can easily answer a question for you, select a different question from the list to maximize your security.
2. In the **Enter your answer** field, enter the correct answer to your selected question.
   
   **Note:** Valid answers can contain any combination of capital or lower case letters (a-z or A-Z), numbers (0-9), and single spaces. Answers cannot contain special characters (such as $, %, or &), punctuation, or consecutive spaces. Your answer cannot start with a space, end with a space, or cannot consist of only spaces. If your answer starts or ends with a space, the leading or ending space is automatically removed from your answer.

3. In the **Re-enter your answer** field, enter the answer to the selected question exactly as you entered it in the **Enter your answer** field.

4. Repeat steps 1 through 3 for the remaining three questions.

5. Click **Save and Continue**. The online card management system saves your additional security questions and answers for use when your logon attempt is seen as a risk.

---

### Verifying your identity

To log on to the application, you must confirm your identity beyond your user ID and password by answering an additional security question. You previously established a set of security questions for this purpose. You may be challenged to answer an additional security question for a number of reasons. For example, if you are using a different computer to access the system than usual, the system will challenge your logon attempt.

**To answer the security challenge question:**

1. Enter the answer to the question you are being asked in the field provided.
   
   **Note:** The question rotates through the four questions you have specified. Every time you are challenged to complete multifactor authentication, a different question displays.

   **Important:** The answer must match the answer you provided when you set up your multifactor authentication questions and answers.

2. Click **Continue**. If the answer you entered is correct, the **Home** page displays and you can begin working in the card management application.

**If you cannot remember the correct answer to your challenge question:**

Contact your online card management application’s program administrator. After confirming your identity, the program administrator can reset your security questions and password. After the questions are reset, you will need to pick a new set of four questions and specify the correct answers the next time you log on to the application. You may have to specify a new password as well.

**Note:** If you answer the question incorrectly on three attempts, your account is disabled and you must contact your program administrator to re-activate your logon and reset your security questions.
Self-registering and managing accounts

As an account holder, you can self-register to use the online card account management system, including viewing account statements and making online payments, and you can add other accounts to manage. You can also view and update information about all of your accounts.

To self-register

You may already have a card account, but not yet be registered to manage your account through the online card management system. In this case, you can self-register by supplying personal and card information and creating a user ID and password.

1. Open your browser and access your organization Logon page

2. On the Logon page click the Not registered? link. The Registration window displays.
3. Complete the following fields in the Registration window:

**Create a user ID and password**

- **Your name**
  Type your first name, without punctuation, in the **First** field, and your last name in the **Last** field.

- **Your email address**
  Type your email address. Email notification messages are sent to this address. You can specify more than one address. Separate multiple addresses with semicolons, for example: `jdoe@bigcompany.com;john_doe@myhome.org`

- **Create a user ID**
  Create a user ID for yourself according to the user ID requirements for your organization. Hold your cursor over the Information icon to see the rules you need to follow when devising your user ID, or see your administrator.

- **Enter a password**
  Create a password for yourself according to the password requirements for your organization. The password is case-sensitive. Hold your cursor over the Information icon to see the rules you need to follow when devising your password, or see your administrator.

- **Re-enter password**
  Retype the password. If there is a difference between this field and the **Enter a Password** field (including capitalization), an error message displays when you save, and you must specify the password again.

- **Your password hint**
  Type a hint that will help you remember your password. This hint can be emailed to you if you forget your password if your organization is set up for email notification.

**Register an existing account**

- **Account number**
  The 16-digit number of your existing account. This number is embossed on the card.

- **Name on account**
  The name on your account, as it displays on the card.

- **Other fields**
  Your organization may require you to supply other card account information, such as card expiration date, employee ID, and Social Security or other identifying number.

4. Click **Register Account**. You are now registered to use the online card management system. A confirmation window opens, and lets you register another account or finish the registration process.

5. To register another account, complete all fields in the Register Another Account section, and click **Register Account**. The account is added, and the confirmation window re-opens. Continue registering accounts, or click **Finish Registration**. The End User License agreement displays.

6. Scroll to the bottom of the license agreement, and click **I Agree**, **I Disagree**, or **Print**. When you click **I Agree**, your organization Home page opens, and you can perform your online account management tasks. The End User License agreement does not appear again after you agree.
To edit your personal information profile

You can change your personal information from the Home page, including your name and email address.

**Note:** All fields on this page are required.

1. Log on to the application. Your organization Home page opens.

2. In the Update User Information section, click the **Edit Personal Information** link. The Edit Personal Information window displays, showing your existing personal information. (Your user ID is displayed, but you cannot change it in this window.)

3. Type the first name and last name you want to be displayed on the Home page when you log on.

4. Enter the email address or addresses to which you want notifications sent. Separate multiple addresses with semicolons, for example: jdoe@bigcompany.com;john_doe@myhome.org

5. Click **Save** to save your new profile information.

6. Choose **HOME** from the menu to return to the Home page.

To add another account

1. Log on to the application. Your Home page opens.
2. In the Update User Information section, click the *Add Account* link. The Add Accounts window opens, showing your current account information. Depending on your site settings and user access, you will be required to provide additional information other than shown below. Contact your organization administrator for the information required for your site.

![Add Accounts Window](image1.png)

3. Supply the required information in the Add Account fields.

4. Click *Add*. The account is added, and the new information displays in the My Accounts section.

5. When you finish adding accounts, select *HOME* from the menu. The Home page re-opens.

### To change your password

1. Log on to the application. Your organization Home page displays.

2. In the Update User Information section, click the *Edit Password* link. The Edit Password window opens.

![Edit Password Window](image2.png)

3. In the **Old Password** field, type your existing password.

4. In the **New Password** field, type the new password you want to use according to the password requirements for your organization. The password is case-sensitive. Hold your cursor over the Information icon to see the rules you need to follow in devising your password, or see your administrator.

5. In the **Confirm New Password** field, type the password exactly as in the **New Password** field. If you enter any different characters, including capitalization differences, the new password will not be accepted.

6. In the **Password Hint** field, type a hint that will help you remember your password. This hint can be emailed to you if you forget your password.

7. Click *Save* to save your new password, or *Cancel* to return to the Home page without changing the password.
To get information about a lost password

1. If you have forgotten your password, on the Logon page, click the *Forgot your password?* link. The Forgot your password? window displays.

2. In the **User ID** field, enter your user ID.

3. Click **Submit**. The password hint you specified when you set up your account is emailed to you.