CPOPC Quick Reference Placemat

US Department of Homeland Security

Obtaining Citibank Support

1. For CitiManager Assistance, click on the link in the upper right hand corner, **Contact Help Desk**.
2. Also, see Citi Support Placemat.

Post a CitiManager Message

1. From the **CitiManager** Site side navigation bar, position your mouse over the **Resources** icon and then click the **Messages** link.
2. To post a new message, click **the Post New Message** link.
3. Click the **Select Hierarchy** link.
4. Click the **(+) plus** sign icon to expand the hierarchy tree. Select the checkboxes for the hierarchies to which you want to post the message. When you are finished, click the **Select** button.
5. From the **Display From** and **Display Till** fields, select the timeframe you wish the message to be posted.
6. From the **Subject** field, type the subject of the post. In the **Message text** field, type the message.
7. Click the **Post** button. The message is sent to Citi for approval.

Adding MCCs to existing MCCG

1. Contact one of your assigned **CAS Managers**
2. See Citi Operations Placemat

Setting up a New User

1. From the **Transaction Management** side navigation bar, click the **Hierarchy** icon.
2. Use the **(+) plus** sign icon to expand the appropriate hierarchy if applicable.
3. From the **Non Cardholder** column, click the **numbered link**.
4. Click the **Add New Contact** link.
5. Complete the necessary information in the **Personal Details** and **Contact Details** sections.
6. From the **User Group** drop-down list, select the appropriate user group.
7. Click the **Submit** button.
   - Note: The User Group determines the type of user you are setting up.
   - The user is set up and a confirmation message displays. Two separate e-mails with the Registration ID and Passcode are sent to the new user.
8. Within 5-7 minutes the user should be replicated in **CitiManager.**
9. From **CitiManager**, click on the **Manage Users** left hand navigation and click **User Search** to display the Search screen
10. Search for the **User** by **Name** or **User Name**
11. Click on blue hyperlink on **User Name** that you wish to view
12. Click **Update User** from the right menu box
13. Click the **(+)** icon next to **Personal Details**, **Contact Details**, **User Roles** and **Hierarchy**, or **Entitlements** to make necessary updates
14. Click **Continue**, then **Save**, and last **Ok**
15. View **User ID** details on the User Details Screen

Updating Account Information

1. From the **CitiManager** Site side navigation bar, position mouse over the **Manage Users** icon and click the **Account Maintenance** link.
2. Type the desired search criteria in **Account Number, First Name, Last Name** or **Username** fields and click the **Search** button.
3. Select the radio button for the account you wish to maintain and click the **Update Account** button.
4. **Manage Account Status**
   - To close an account from the **Spending Controls** section, from the **Account Status** drop-down list, select the desired rating.
   - When you are finished, click the **Submit** button.
5. **Updating Address and Last Names**
   - Changing Last Names will require a call to your CAS or Customer Service
   - Address Update – Update Demographic information
6. **Adding or Changing MCCG**
   - To **add/remove an MCCG**, click the **Add/Remove MCCGroups** link.
   - Select or deselect the checkbox(es) for the desired MCCGs. If you are **adding** and **deleting MCCGs** to an account, you must perform the additions prior to submitting the deletions. When you are finished, click the **Update** button and then the Back to Form button.

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Approve/Reject Modification & New Account Request

1. From the CitiManager Site side navigation bar, position your mouse over the **Manage Users** icon and click the **View Requests** link

OR

1. From the CitiManager Site Home screen Application Request or Maintenance Request sections, click desired Request ID.
2. Review the request details.
3. When you are finished reviewing the request, select either the **Approve** or **Reject** radio button.

    Note: If request is rejected, you are required to type a reason for the rejection in **Comments field** and then click the **Save comment** link. By default, the Allow for Resubmit checkbox is selected. Deselect the checkbox if resubmission is not allowed. When you are finished, click the **Submit** button.

Issuing an Emergency Card

1. Complete the Citi **Bulk Online Application (BOLA) Form** listing cardholder(s) requiring an Emergency Card.

    Note: Selection the option for Expedited Card to ensure Overnight Shipment.
2. Submit the **BOLA Form** for processing via **CitiManager**.
3. Contact one of your **CAS Managers** to inform them of the BOLA upload so they can ensure cards are created and overnighted.
4. After the BOLA form is processed, Emergency Cards will be shipped overnight.

Transfer Card Account Hierarchy*

1. From the CitiManager Site side navigation bar, position your mouse over the **Manage Card Program** icon and click the **Bulk Hierarchy Transfer** link.
2. Select the radio button for the receiving hierarchy where the accounts will be transferred.
3. Click the **Transfer Hierarchy** button.
4. To perform a search, type the desired search criteria in the **Card First Name**, **Card Last Name** or **Card Number fields** and click the **Search button.**
5. From the **Card Number column**, select the radio button for the card account you wish to transfer and click the **Add Account for Transfer link.**
6. To add additional accounts to be transferred (in bulk), repeat Step 5 for each account to be transferred. When you are finished, continue to Step 7.
7. When all accounts have been added, click the **Continue button**.
8. Verify the accounts selected for transfer, and click the **Continue button**.

Create/Modify Hierarchy

1. Complete the **Citi Hierarchy Build Spreadsheet** and submit to one of your **CAS Managers.**

Issuing a Replacement Card

1. Contact your **CAS Manager** or **Customer Service** to report or replace lost or stolen cards.

Accessing Links/Help

1. From the CitiManager Site side navigation bar, position your mouse over the **Resources button** and then click the **Links & Help link**.
2. Click the link for the resource you wish to access. Click the **OK** button.
3. If a document was selected, click the **OK** button to close the message. The browser document option window displays. The location of the Save or Open options vary based on your browser settings.
4. Click either the **Save or Open** option.

Reset a User's Password

1. From **Manage Users** , click **User Search**.
2. Type desired search criteria and click Search.
3. From the **Username** column, click the **link** for the user you wish to view.
4. When user is found check status column. If deactivated, then click link in username column for the user. At the top right side, click **activate user.** Enter reason for activation. Click **Activate.**
5. From the right-side of the **User Details screen**, click the **Reset Password link**.
6. Click the **Reset button**.
7. A confirmation message displays at the top of the screen. An automated e-mail with the password reset steps will be sent to the e-mail associated with the user's profile.