

# CitiManager® Site Agency Program Coordinator

Department of Defense

Quick Start Guide

January 2026

Treasury and Trade Solutions





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# Overview

## Document Scope

This CitiManager® Quick Start Guide for Agency Program Coordinators provides detailed step-by-step instructions for some of the most commonly used CitiManager Site functions available to Agency Program Coordinators (APCs).

**Screen captures in this guide contain dummy data for personal information and it is used for illustrative purposes only.**

## Your Access May Vary

The functions you have access to are based on your role and entitlements. You may not have entitlements for all the functions described in this User Guide. Some fields are defined at the agency/organization level so there may be variances in what is described in this User Guide based on your agency/organization's setup.

## A Note About Navigation

Most step-by-step instructions in this User Guide assume you are already logged into the CitiManager Site. Refer to the **Log In to CitiManager Site** topic for the steps required to log in.

Unless otherwise noted, the step-by-step instructions begin from the CitiManager Site **Home** screen.

## What Is CitiManager?

The CitiManager Site is a powerful online tool that allows Non-cardholders to efficiently manage their card programs. Depending on your agency/organization's setup, you will be able to:

- View accounts, statements, balances and transactions
- Dispute transactions
- View authorizations/decline
- View, approve or reject applications
- Perform account maintenance
- Activate and deactivate users
- Assign applications
- Set passcodes
- Manage alerts
- Manage your profile
- Access on-demand training resources in the Learning Center

## Compatible Browsers

The CitiManager Site is compatible with the latest versions of Chrome and Edge.

# Basic Navigation

## Description

After you log in to the CitiManager Site, the **Home** screen displays. The **Home** screen acts as a dashboard and displays a high level metric summary of your program — including accounts overdue, total credit remaining, number of un-activated cards and recent activity at your hierarchy level.

You can also view a list of application requests. Use the navigation options from the header and the navigation bar as well as quick links to navigate to additional program information and preferences.

Screen	Step/Action
<p><b>CitiManager Home Screen</b></p>	<p><b>Header Section</b></p> <ol style="list-style-type: none"> <li>1. Click the <b>Citi</b> logo on the far left-side of the header to be directed to the Citi Commercial Cards website.</li> <li>2. Click the <b>CitiManager</b> link on the left-side of the header to return to the <b>Home</b> screen.</li> <li>3. Your agency/organization name displays on the left-side of the header.</li> <li>4. If you need assistance from the Helpdesk, click the <b>Contact Help Desk</b> icon that displays on the right-side of the header.</li> <li>5. If you have both Cardholder and APC (Program Administrator) access to the CitiManager Site, you can toggle between both accounts by positioning your mouse over the role icon that displays on the right-side of the header and selecting the desired role.</li> <li>6. Click the <b>My Profile</b> icon on the far right-side of the header to access or modify your profile details.</li> </ol> <p><b>Navigation Bar</b></p> <ol style="list-style-type: none"> <li>7. Click the <b>Home</b> link to return to the <b>Home</b> screen.</li> <li>8. Position your mouse over the <b>Manage Users</b> drop-down menu to create a new CitiManager Site account for APCs, perform a user search and view requests. Once you have completed a search, the <b>Cardholder Details</b> or <b>Non-Cardholder Details</b> screens can be used to view account information and are the launching point to perform account activities using the links on the left-side of the screen.</li> </ol>

Screen	Step/Action																					
<p><b>CitiManager Home Screen</b></p> <table border="1"> <caption>Application Request</caption> <thead> <tr> <th>REQUEST ID</th> <th>STATUS</th> <th>REQUEST TYPE</th> </tr> </thead> <tbody> <tr> <td>6715287337</td> <td>Waiting for approval</td> <td>Individual online application</td> </tr> <tr> <td>6710454627</td> <td>Waiting for approval</td> <td>Individual online application</td> </tr> <tr> <td>6671099122</td> <td>Waiting for approval</td> <td>Individual online application</td> </tr> <tr> <td>6666468134</td> <td>Waiting for approval</td> <td>New Account Application</td> </tr> </tbody> </table> <table border="1"> <caption>Maintenance Request</caption> <thead> <tr> <th>REQUEST ID</th> <th>STATUS</th> <th>REQUEST TYPE</th> </tr> </thead> <tbody> <tr> <td colspan="3">There are no pending Maintenance requests that are waiting your approval</td> </tr> </tbody> </table>	REQUEST ID	STATUS	REQUEST TYPE	6715287337	Waiting for approval	Individual online application	6710454627	Waiting for approval	Individual online application	6671099122	Waiting for approval	Individual online application	6666468134	Waiting for approval	New Account Application	REQUEST ID	STATUS	REQUEST TYPE	There are no pending Maintenance requests that are waiting your approval			<ol style="list-style-type: none"> <li>Position your mouse over the <b>Manage Card Program</b> drop-down menu to perform bulk hierarchy transfers, perform document management (e.g. bulk online maintenance, bulk online applications, list), print multiple statements, run CitiManager Reports, set alerts for a hierarchy, set passcodes and pre-fill application form data and view your hierarchy.</li> <li>Position your mouse over the <b>Reporting &amp; Library</b> drop-down menu to access the CitiManager — Reporting tool and run reports.</li> <li>Position your mouse over the <b>Resources &amp; Tools</b> drop-down menu to access Transaction Management if you have the entitlement, access the Learning Center, view Links &amp; Help, view messages, initiate a search for APCs to view their hierarchy, role, full name, and user profile e-mail address.</li> <li>Position your mouse over the <b>Alerts</b> drop-down menu to manage your alert subscriptions, view the audit log, and the view on-demand mobile alert information.</li> <li>Click the <b>Guided Self Help</b> link to open a guided self-service window. Once the window is open you can search for a topic or click on the Quick Actions that display to open step-by-step instructions. The window will remain open until you close it so you can reference the instructions while you perform the task. The topics available are limited to frequently asked questions and are based on your entitlements. For step-by-step instructions for all functions, refer to the CitiManager Non-cardholder End-to-End Guide. The full library of User Guides and web-based training is available from the Learning Center.</li> <li>Click the <b>Sign Out</b> link on the far right-side of the navigation bar to log out of the CitiManager Site.</li> </ol>
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6715287337	Waiting for approval	Individual online application																				
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There are no pending Maintenance requests that are waiting your approval																						

# Register as an Agency Program Coordinator

## Key Concepts

As an APC, it's possible to register for the CitiManager Site so you can manage your card program.

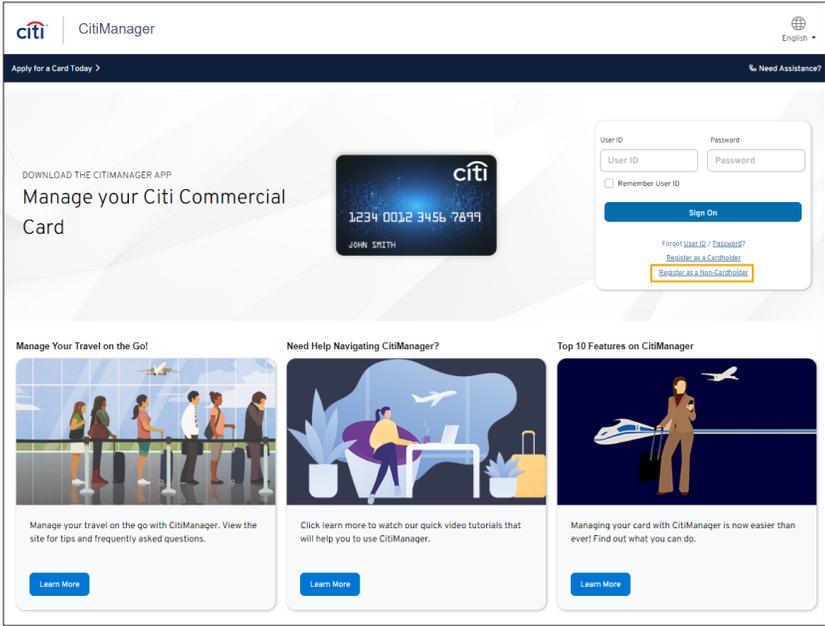
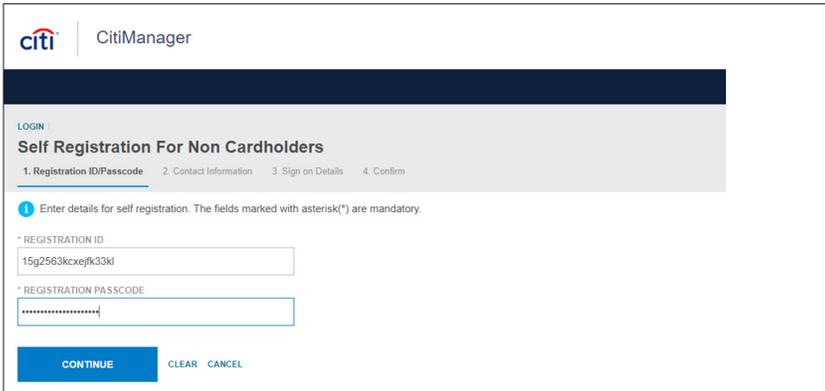
In order to register, another APC must set up a profile first which will generate a Registration ID and a Registration Passcode.

Citi will send one e-mail with the Registration ID and another with the Registration Passcode. These e-mails are required during the registration process.

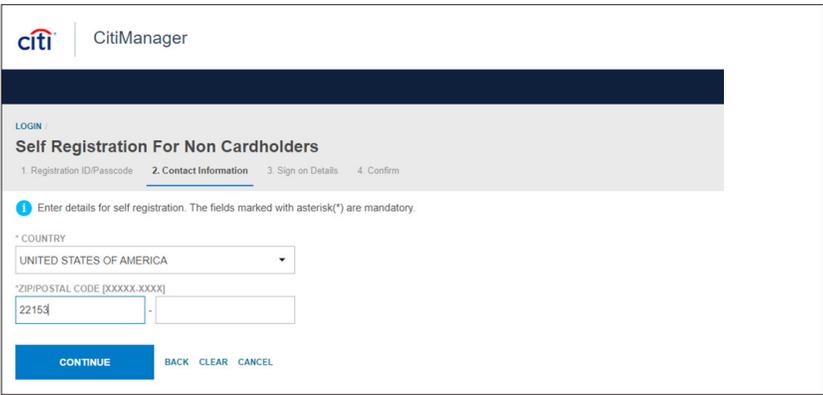
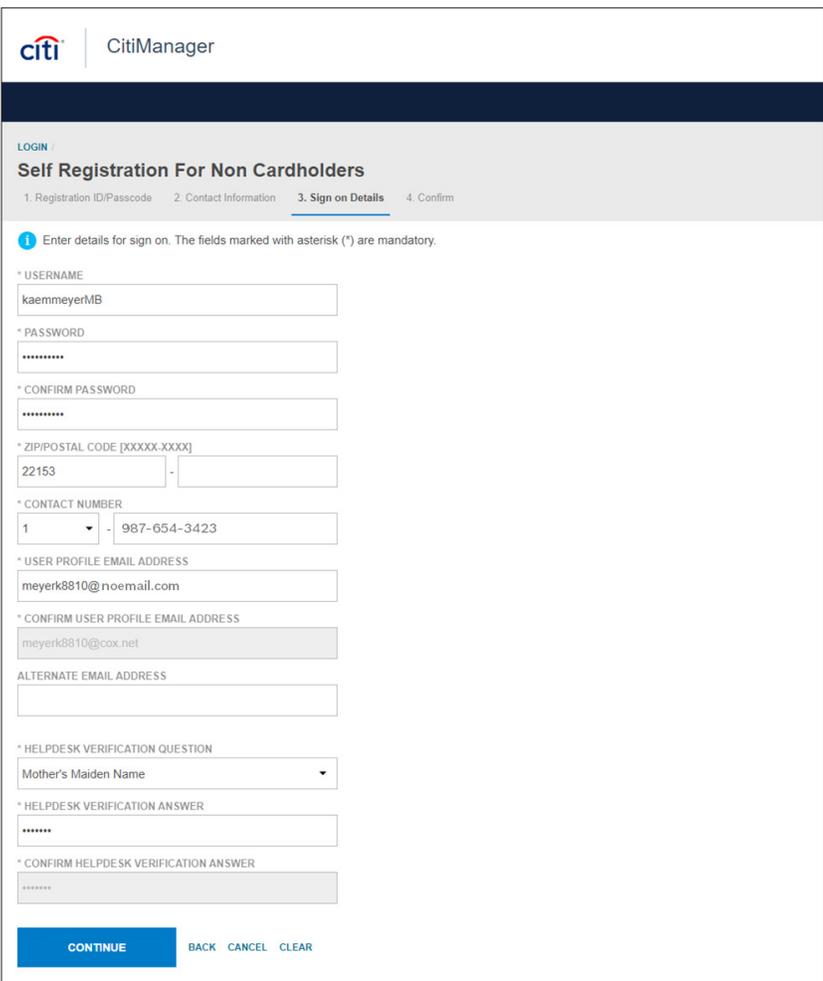
Once you receive your registration details, you must register within 60 days or your details will expire. You will be reminded every 15 days until your registration is complete.

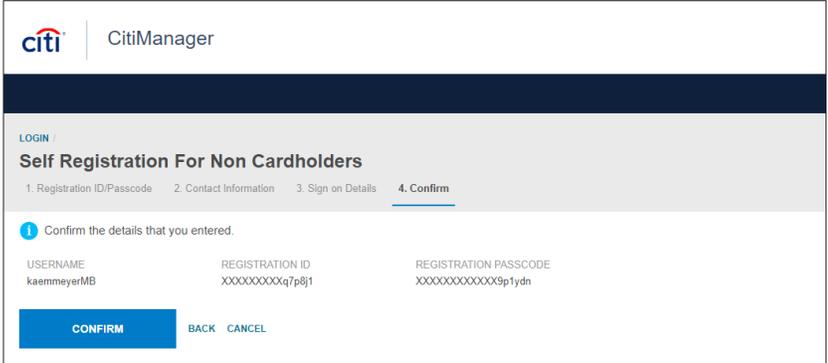
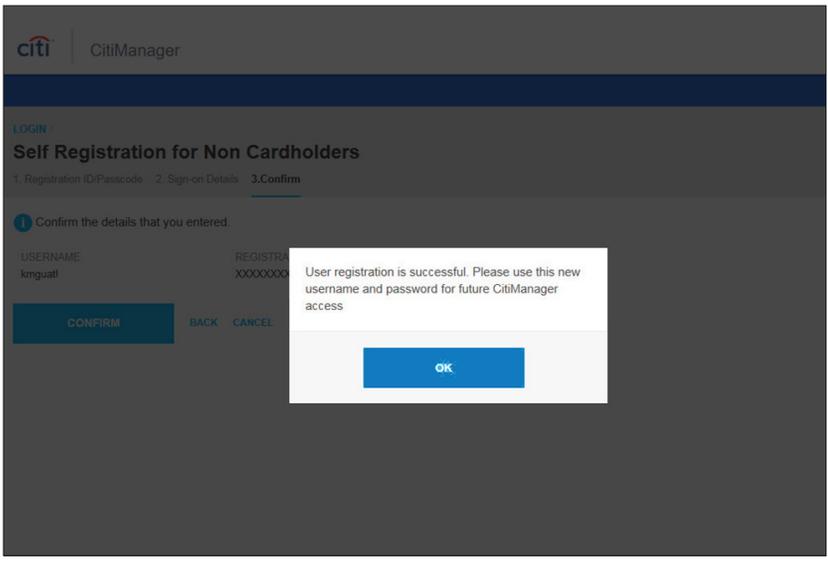
The Registration ID and Passcode can be re-sent by another APC.

## Step-By-Step Instructions

Screen	Step/Action
 <p><b>CitiManager Site Login Screen</b></p>	<ol style="list-style-type: none"> <li>1. Navigate to <a href="http://www.citimanager.com/login">www.citimanager.com/login</a>. <i>The CitiManager Site Login screen displays.</i></li> <li>2. Click the <b>Register as a Non-Cardholder</b> link. <i>The Registration ID/Passcode screen displays.</i></li> </ol>
 <p><b>Registration ID/Passcode Screen</b></p>	<ol style="list-style-type: none"> <li>3. In the <b>Registration ID</b> field, type the Registration ID supplied in the e-mail sent from the CitiManager Site.</li> <li>4. In the <b>Registration Passcode</b> field, type the Registration Passcode supplied in the e-mail sent from the CitiManager Site.</li> <li>5. Click the <b>Continue</b> button. <i>The Contact Information screen displays.</i></li> </ol>



Screen	Step/Action
	<ol style="list-style-type: none"> <li>6. From the <b>Country</b> drop-down list select your country.</li> <li>7. From the <b>Zip/Postal Code</b> field, type your zip/postal code.</li> <li>8. Click the <b>Continue</b> button. <i>The Sign On Details screen displays.</i></li> </ol>
<p><b>Contact Information</b></p>  <p><b>Sign On Details Screen</b></p>	<ol style="list-style-type: none"> <li>9. In the <b>Username</b> field, type your desired username. <b>Note:</b> The username requirements display in a window as you type your username. A checkmark displays when the requirement is fulfilled.</li> <li>10. In the <b>Password</b> field, type and confirm a password that meets the requirements. <b>Note:</b> The password requirements display in a window as you type your password. A checkmark displays when the requirement is fulfilled.</li> <li>11. In the <b>Confirm Password</b> field, re-type the password.</li> <li>12. Verify the information in the <b>Zip/Postal Code, Contact Number</b> and <b>User Profile Email Address</b> fields and update if necessary.</li> <li>13. From the <b>Helpdesk Verification Question</b> drop-down list, select a question that will be used to verify your identity should you need to reset your password or retrieve your username.</li> <li>14. From the <b>Helpdesk Verification Answer</b> field, type an answer to the Helpdesk verification question you selected.</li> <li>15. When you are finished, click the <b>Continue</b> button. <i>The Confirm screen displays.</i></li> </ol>

Screen	Step/Action
 <p><b>Confirm Screen</b></p>	<p>16. Review the details and click the <b>Confirm</b> button.</p> <p><i>A confirmation message displays indicating registration was successful and a confirmation e-mail is sent to the address entered during the registration process.</i></p>
 <p><b>Confirmation Message</b></p>	<p>17. Click the <b>OK</b> button.</p> <p><i>The CitiManager Site Login screen displays. When you log in for the first time, you will be prompted to select and answer three challenge questions.</i></p>

Screen	Step/Action
	<p>18. In the <b>User ID</b> and <b>Password</b> fields, type your username and password and click the <b>Sign On</b> button.</p> <p><i>The Reset Challenge Questions and Answers screen displays.</i></p>
<p><b>CitiManager Site Login Screen</b></p>	
	<p>19. Select and answer three challenge questions.</p> <p><b>Note:</b> As part of the confirmation of the challenge questions, you are required to answer each question twice.</p> <p>20. Click the <b>Save</b> button.</p> <p><i>The CitiManager Site Home screen displays.</i></p>
<p><b>Reset Challenge Questions and Answers Screen</b></p>	

# Log In to the CitiManager Site

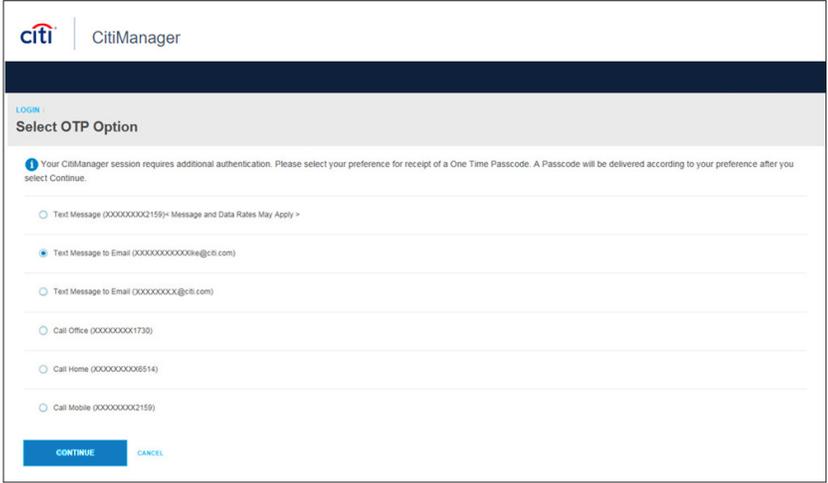
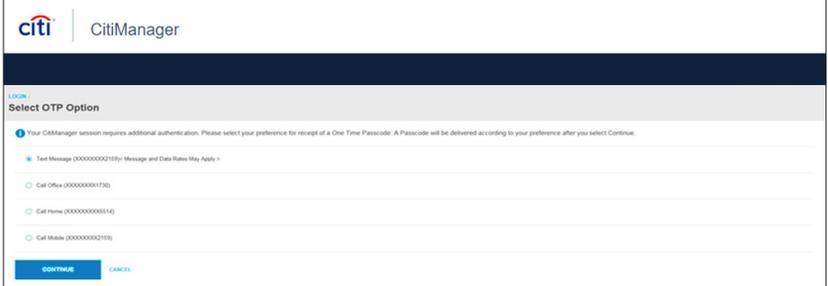
## Key Concepts

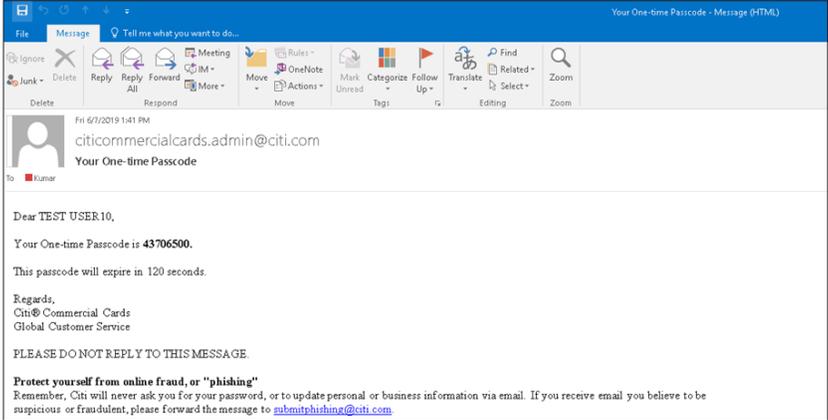
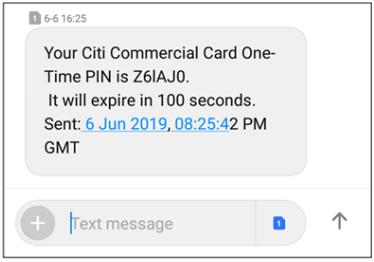
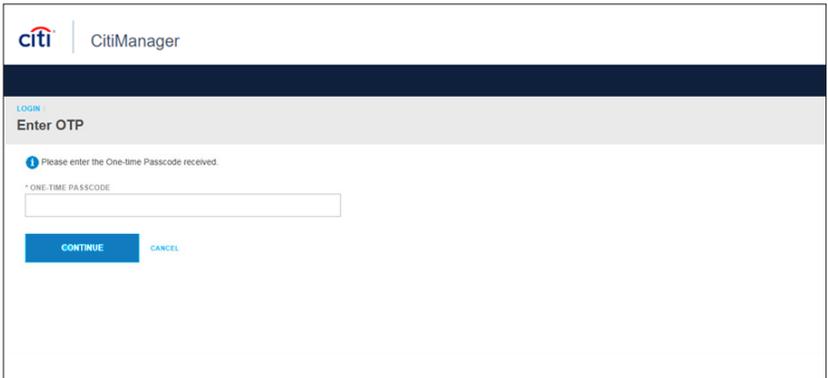
In order to access your account information in the CitiManager Site, you must log in to the application using a valid username and password and you will be prompted to enter a one-time passcode (OTP). You can only have one session of CitiManager open at a time.

If you cannot remember your username or password, refer to the **Retrieve Forgotten Username** or **Reset Forgotten Password** topics in this User Guide.

## Step-By-Step Instructions

Screen	Step/Action
<p><b>CitiManager Site Login Screen</b></p>	<ol style="list-style-type: none"> <li>1. Navigate to <a href="http://www.citimanager.com/login">www.citimanager.com/login</a>. <i>The CitiManager Site Login screen displays.</i></li> <li>2. In the <b>User ID</b> field, type your user ID.</li> <li>3. In the <b>Password</b> field, type your password.</li> <li>4. Click the <b>Sign On</b> button. <i>The One-Time Passcode receipt options screen displays.</i></li> </ol>

Screen	Step/Action
	<p>5. Select the option for how you would like to receive your OTP.</p> <p><b>Note:</b> Possible options are Email, Text Message, Call Office, Call Home and Call Mobile. Only the options currently set up in your CitiManager Site profile will be available as possible options.</p>
<p><b>Select OTP Option Screen — E-mail</b></p>	
	<p>6. Click the <b>Continue</b> button.</p>
<p><b>Select OTP Options Screen — Text</b></p>	

Screen	Step/Action
 <p><b>OTP — E-mail</b></p>  <p><b>OTP — Text</b></p>	<p>7. Retrieve your OTP from the receipt option selected.</p>
 <p><b>Enter OTP Screen</b></p>	<p>8. In the <b>One-time Passcode</b> field, enter the eight-digit passcode received from the receipt option you selected and click the <b>Continue</b> button.</p> <p><i>The CitiManager Site Home screen displays.</i></p>



# Retrieve Forgotten Username

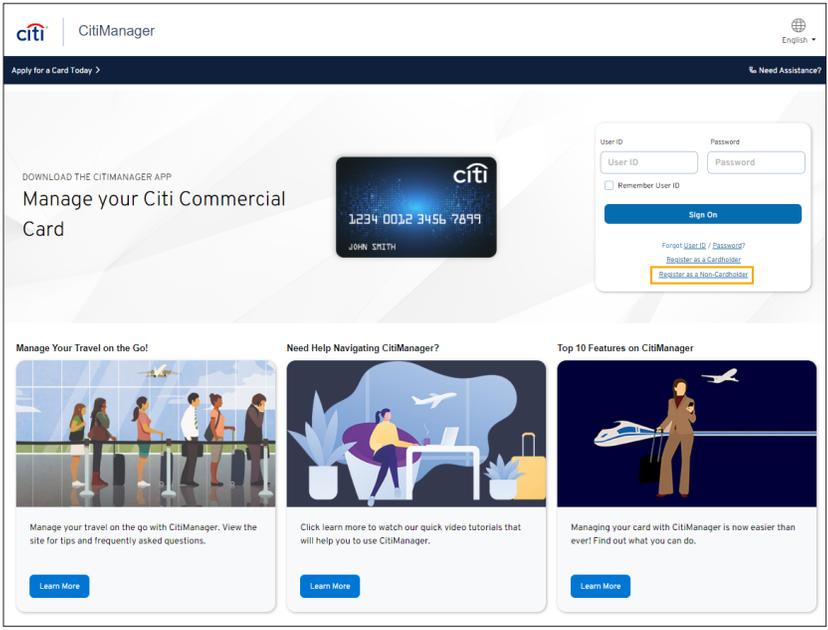
## Key Concepts

If you forget your username, you will need to retrieve it in order to log into the CitiManager Site. When you are finished submitting the request, your username will be sent to your e-mail address.

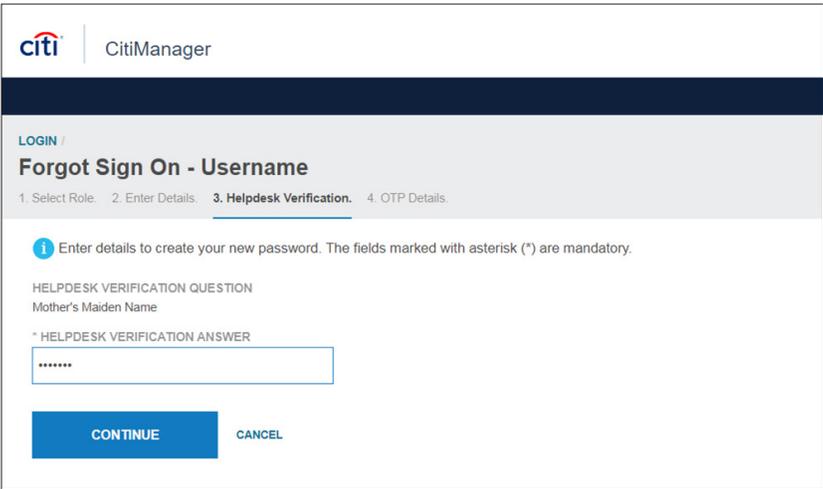
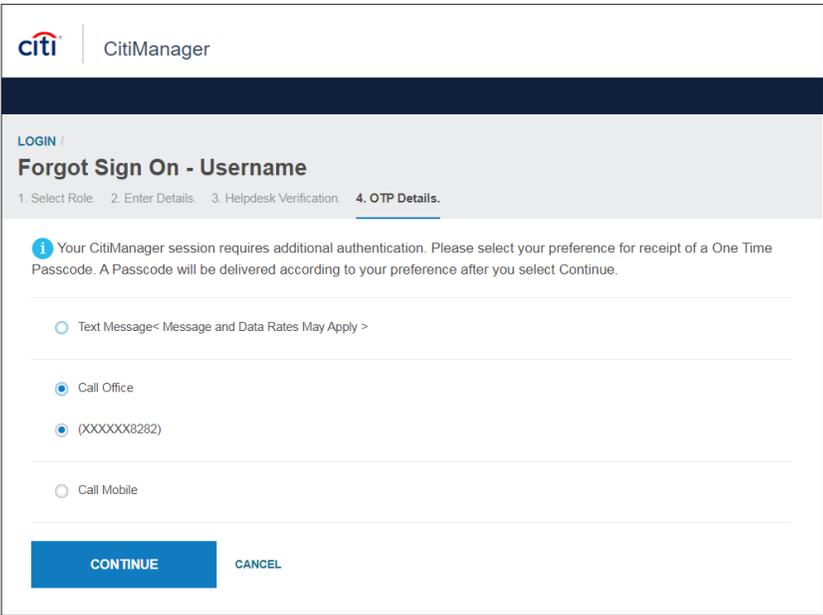
To retrieve your username, the following information is required:

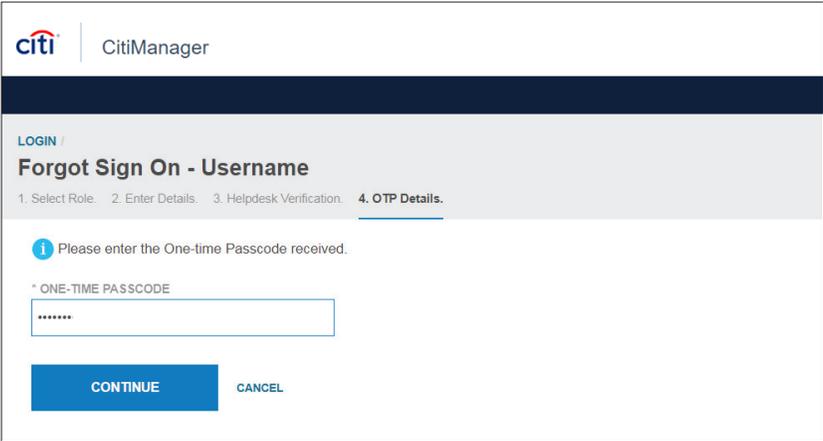
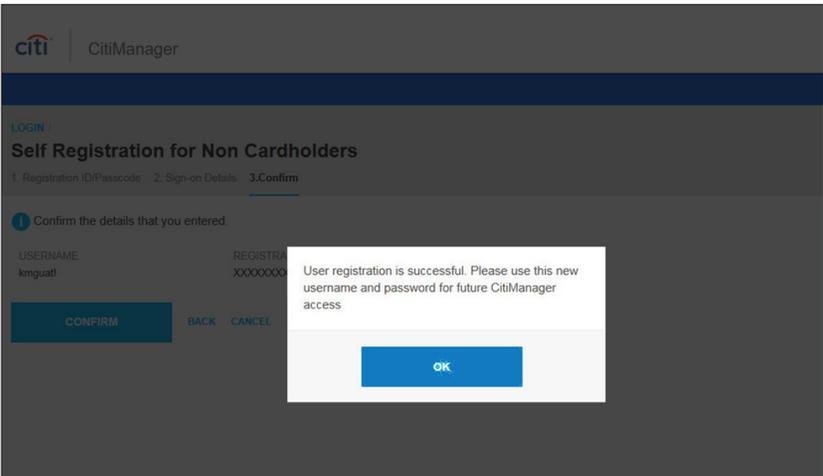
- Your first and last name
- Your country
- Your contact phone number
- The zip code/postal code associated with your user profile
- The e-mail address associated with your user profile

## Step-By-Step Instructions

Screen	Step/Action
 <p><b>CitiManager Site Login Screen</b></p>	<ol style="list-style-type: none"> <li>1. Navigate to <a href="http://www.citimanager.com/login">www.citimanager.com/login</a>. <i>The CitiManager Site Login screen displays.</i></li> <li>2. Click <b>Forgot User ID</b> link. <i>The Forgot User ID — Select Role screen displays.</i></li> </ol>

Screen	Step/Action
	<p>3. Select the <b>Non-Cardholder</b> role radio button and click the <b>Continue</b> button.</p> <p><i>The Forgot Sign On — Username — Enter Details screen displays.</i></p>
	<p>4. In the <b>First Name</b> field, type your first name.</p> <p>5. In the <b>Last Name</b> field, type your last name.</p> <p>6. From the <b>Country</b> drop-down list, select your country.</p> <p>7. In the <b>Contact number</b> field, type your contact phone number. Only numeric values are allowed.</p> <p>8. In the <b>Zip/Postal</b> code field, type the zip code associated with your user profile.</p> <p>9. In the <b>Email Address</b> field, type the e-mail address associated with your user profile.</p> <p>10. In the <b>Confirm Email Address</b> field, re-type the e-mail address that is associated with your user profile.</p> <p>11. Click the <b>Continue</b> button.</p> <p><i>The Forgot Sign On — Username — Helpdesk Verification screen displays.</i></p>
<p><b>Forgot User ID — Select Role Screen</b></p>	<p><b>Forgot Sign On — Username — Enter Details Screen</b></p>

Screen	Step/Action
 <p><b>Forgot Sign On — Username — Helpdesk Verification Screen</b></p>	<p>12. In the helpdesk verification answer field, type the answer to the helpdesk verification question and click the <b>Continue</b> button.</p> <p><i>The Forgot Sign On — Username — OTP Details screen displays.</i></p> <p><b>Note:</b> You have three attempts to answer the helpdesk verification question correctly.</p>
 <p><b>Forgot Sign On — Username — OTP Details</b></p>	<p>13. From the <b>OTP Details</b> screen, select the appropriate contact option and click the <b>Continue</b> button.</p> <p><i>A passcode is sent via text message or phone call depending on the option you have selected.</i></p>

Screen	Step/Action
 <p><b>Forgot Sign On — Username — Input OTP</b></p>	<p>14. From the <b>One-Time Passcode</b> field, type the passcode you were provided and click the <b>Continue</b> button.</p> <p><i>A confirmation message displays.</i></p>
 <p><b>Confirmation Message</b></p>	<p>15. Click the <b>OK</b> button.</p> <p><i>The CitiManager Site Login screen displays and the CitiManager Site sends an e-mail with your username.</i></p>

# Reset Forgotten Password

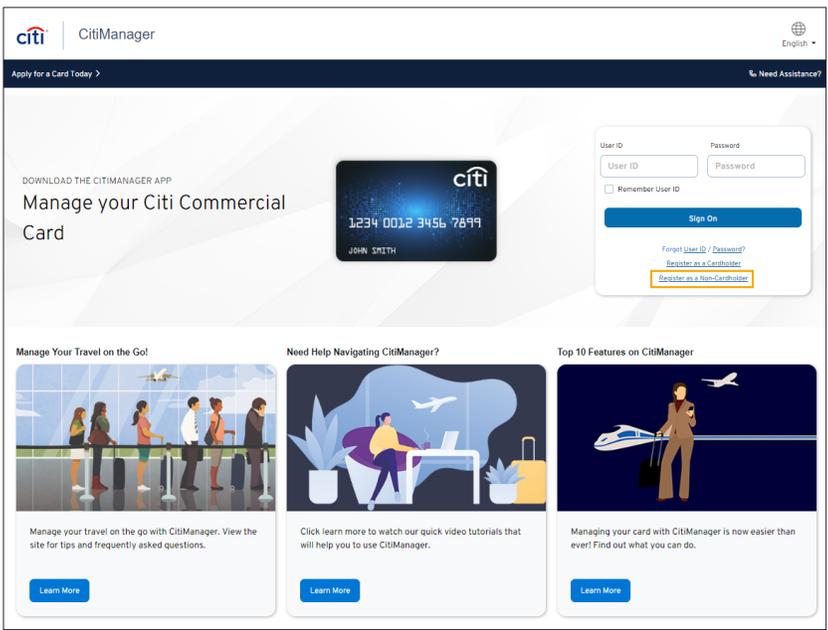
## Key Concepts

If you forget your password, you will need to reset it in order to sign in to the CitiManager Site.

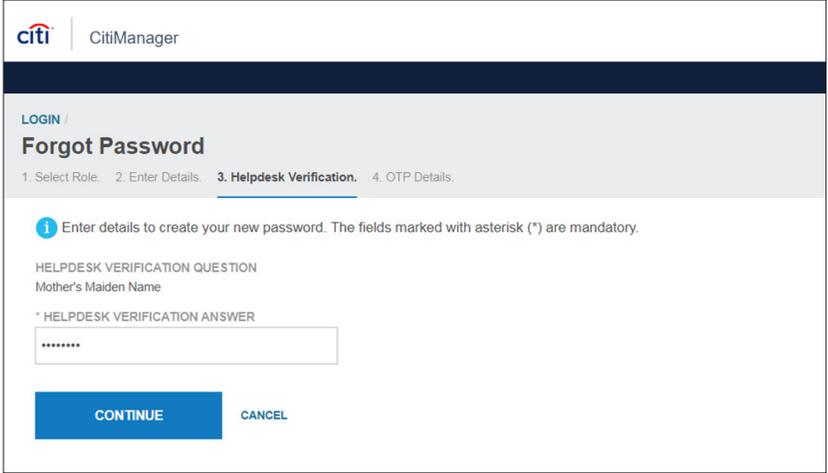
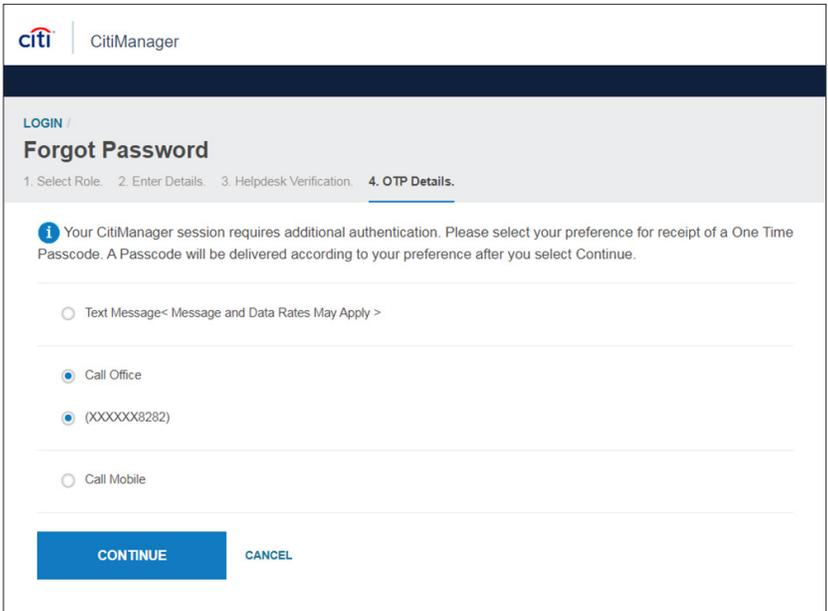
To reset your password, the following information is required:

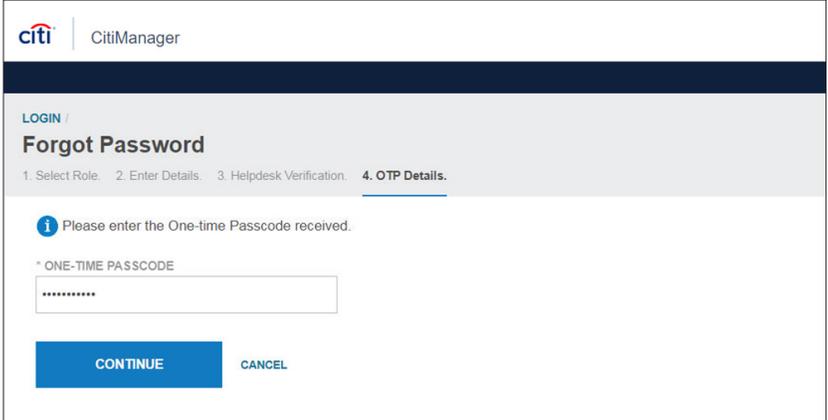
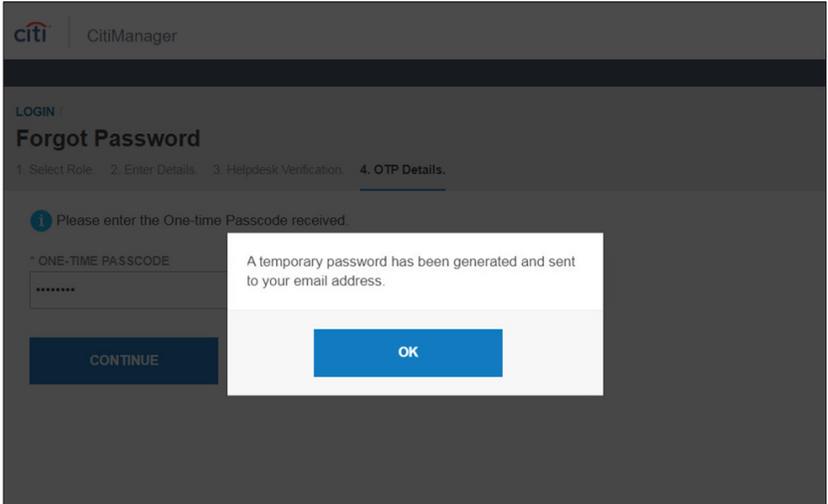
- A valid username
- The zip/postal code associated with your profile
- The e-mail address associated with your profile
- Your Helpdesk verification answer

## Step-By-Step Instructions

Screen	Step/Action
 <p><b>CitiManager Site Login Screen</b></p>	<ol style="list-style-type: none"> <li>1. Navigate to <a href="http://www.citimanager.com/login">www.citimanager.com/login</a>. <i>The CitiManager Site Login screen displays.</i></li> <li>2. Click the <b>Forgot Password</b> link. <i>The Forgot Password — Select Role screen displays.</i></li> </ol>

Screen	Step/Action
<p><b>Forgot Password — Select Role Screen</b></p>	<p>3. Select the <b>Non-Cardholder</b> role radio button and click the <b>Continue</b> button.</p> <p><i>The Forgot Password — Enter Details screen displays.</i></p>
<p><b>Forgot Password — Enter Details Screen</b></p>	<p>4. In the <b>Username</b> field, type your username.</p> <p>5. In the <b>Zip/Postal Code</b> field, type the zip code associated with your user profile.</p> <p>6. In the <b>Email Address</b> field, type the e-mail address associated with your user profile.</p> <p>7. In the <b>Confirm Email Address</b> field, re-type the e-mail address associated with your user profile.</p> <p>8. To validate the information entered, click the <b>Continue</b> button.</p> <p><i>The Forgot Password — Helpdesk Verification screen displays.</i></p>

Screen	Step/Action
 <p><b>Forgot Password — Helpdesk Verification</b></p>	<p>9. In the <b>Helpdesk Verification Answer</b> field, type the answer to the verification question.</p> <p>10. Click the <b>Continue</b> button.</p> <p><i>The <b>Forgot Password — OTP Details</b> screen displays.</i></p>
 <p><b>Forgot Password — OTP Details — Select OTP Option</b></p>	<p>11. From the <b>OTP Details</b> screen, select the appropriate contact option and click the <b>Continue</b> button.</p> <p><i>A confirmation message displays indicating a temporary message has been created and set to your email address.</i></p>

Screen	Step/Action
 <p><b>Forgot Password — Enter OTP Details</b></p>	<p>12. In the <b>One-Time Passcode</b> field, type the passcode you were provided and click the <b>Continue</b> button.</p> <p><i>A confirmation message displays indicating a temporary message has been created and sent to your email address.</i></p>
 <p><b>Forgot Password — Temporary Password Message Screen</b></p>	<p>13. Click the <b>OK</b> button.</p> <p><i>The CitiManager Site Login screen displays.</i></p>



# Search for a Cardholder and View Cardholder Details

## Key Concepts

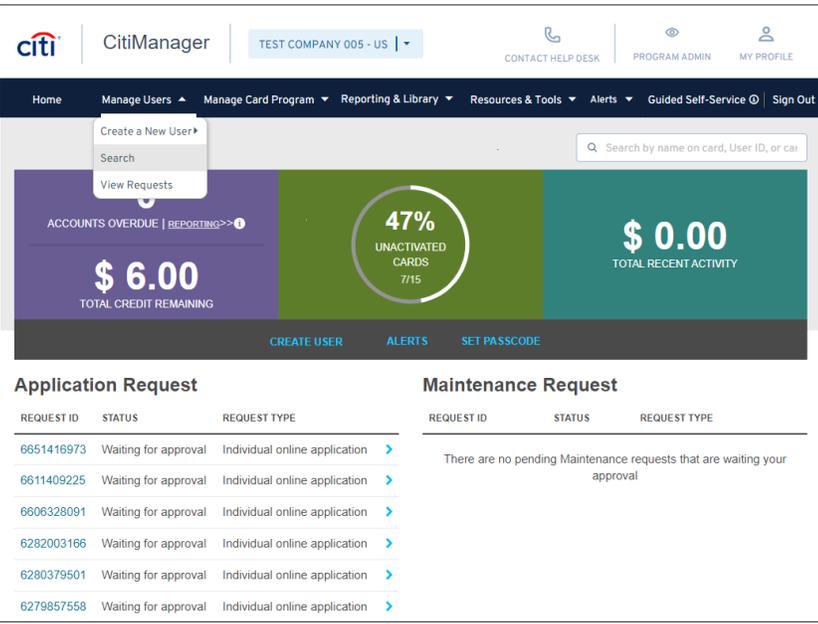
You can search for Cardholder accounts that reside in your assigned hierarchies. Once the search is complete, you may view:

- Balance, credit limit and payment information
- Recent transactions and previous statements
- Aging of balance information
- Card contact information

APCs can only access accounts within their span of control.

The **Cardholder Details** screen is also a launching point if you want to view recent transactions, billed statements/transactions or perform other actions such as viewing disputes if they were submitted through the CitiManager Site, viewing the account hierarchy or setting alerts for the Cardholder.

## Step-By-Step Instructions

Screen	Step/Action
 <p>The screenshot shows the CitiManager Site Home Screen. At the top, there is a navigation bar with the Citi logo, 'CitiManager', and a dropdown menu for 'TEST COMPANY 005 - US'. Below the navigation bar, there are several menu items: Home, Manage Users, Manage Card Program, Reporting &amp; Library, Resources &amp; Tools, Alerts, Guided Self-Service, and Sign Out. A search bar is located on the right side of the page. The main content area features three large cards: 'ACCOUNTS OVERDUE   REPORTING' with a value of \$6.00, 'UNACTIVATED CARDS' with a 47% gauge and 7/15 count, and 'TOTAL RECENT ACTIVITY' with a value of \$0.00. Below these cards, there are two tables: 'Application Request' and 'Maintenance Request'. The 'Application Request' table has columns for Request ID, Status, and Request Type, with several rows of data. The 'Maintenance Request' table is empty, with a message stating 'There are no pending Maintenance requests that are waiting your approval'.</p>	<ol style="list-style-type: none"> <li>1. From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link.  <i>The Search screen displays.</i></li> </ol>



Screen	Step/Action
<p><b>Search Screen</b></p>	<p>2. To perform a search, type the desired search criteria and click the <b>Search</b> link.</p> <p><b>Note:</b> To search by <b>Employee ID</b>, <b>Status Type</b> or <b>Billing Type</b>, click the <b>Add More Criteria</b> link.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p><b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.</p> <p>3. From the <b>Username</b> column, click the link for the card account you wish to view.</p> <p><i>The Cardholder Details screen displays the card overview including the current balance, available credit, credit limit, payment history, aging of balance, recent transactions, previous statements, transaction details and card contact information.</i></p> <p><b>Note:</b> To perform a new search or return to your search results, from the breadcrumbs that display on top-left of the screen, position your mouse over the ellipsis (...) and click either <b>Search</b> or <b>Search Results</b>.</p>

Cardholder Details Screen Overview

Screen	Step/Action
	<ol style="list-style-type: none"> <li>Links displayed on the left-side of the screen can be used to perform additional actions on the card account. The links displayed are based on your entitlements and agency/organization's set-up.</li> <li>If the account has pending application and maintenance requests or the Cardholder has not yet registered for the CitiManager Site, a message displays at the top of the screen and you can click the link to view the requests or resend the registration details.</li> <li>In the card information section, the card number, card status, the current balance, available credit, statement closing date and credit limit display. If you have additional card accounts, a drop-down arrow displays, and you can select another account to view. The account status displays in the top-right of the sections. You can click the <b>Edit/Account Maintenance</b> or <b>Replace Card</b> buttons to perform account maintenance or initiate a card replacement.</li> <li>In the <b>Payment Due</b> section, the current amount due, the next payment due and last payment received display. Click the <b>View Scheduled Payment</b> link to display any scheduled payment information such as amount, date, bank routing number, bank name, bank account number and type and the status of the payment.</li> <li>In the <b>Payment History</b> section, the date, payment amount and status of the payment display. Click the <b>View Payment History</b> link to display payment information such as amount, date, bank routing number, bank name, bank account number and type and the status of the payment. This section displays based on your agency/organization's set-up. You must also have the entitlements to make a payment and view payment history.</li> </ol>
<p><b>Cardholder Details Screen</b></p>	



Screen	Step/Action
<p>The screenshot displays the 'Cardholder Details' screen for a 'PVT TEST ACCOUNT'. The interface includes a navigation menu on the left with options like 'Assign/Unassign Applications' and 'View Account Information'. The main content area is divided into several sections: a top notification for pending requests (2), a card summary showing a current balance of \$0.00 and available credit of \$1.00 (3); a payment section with 'No Payment Due' (4); an 'Aging of Balance' section with a table showing \$0.00 across all categories (6); a 'Recent Transactions' section with filters and a table (7); and a 'Card Contact Information' section with account details and contact info (8).</p>	<ol style="list-style-type: none"> <li>In the <b>Aging of Balance</b> section, the total past due and days past due (1-120) display.</li> <li>In the <b>Recent Transactions/Statements</b> section, you can view recent or billed transactions. You can select a statement date from the <b>Time Period</b> drop-down list. You can also click the links on the top-right of the section to view additional statement details, perform an advanced search, print a statement or download a statement. From the bottom of the section, you can click the <b>Load More Transactions</b> link to display additional transactions. Ten transactions display by default and ten additional will display if you load more transactions. You can click the <b>View All Transaction</b> link to view all transactions or search for a transaction.</li> <li>The <b>Card Contact Information</b> section displays the account name, the address and contact information, the account status and agency/organization name. From the bottom of the section, you can click the <b>View More Details</b> link to display additional contact information or click the <b>Edit/Account Maintenance</b> link to perform account maintenance.</li> </ol>
<b>Cardholder Details Screen</b>	

# Search for APCs and View User Account Information

## Key Concepts

You can search for an APC and view their user account information. Once the search is complete, you may view account information including their:

- CitiManager Status
- Company Name
- Address
- E-mail Address
- Phone Number
- Role
- Entitlements

## Search for APCs

## Step-By-Step Instructions

Screen	Step/Action																											
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CitiManager Site Home Screen — Manage Users Menu

Screen	Step/Action
<p><b>Search Screen</b></p>	<p>2. To perform a search, type the desired search criteria and click the <b>Search</b> link.</p> <p><b>Note:</b> To filter by Non-cardholder (A/OPC), from the <b>Role Types</b> drop-down list, select <b>Non-Cardholder + Card Applicant</b>. To search by <b>Employee ID, Status Type</b> or <b>Billing Type</b>, click the <b>Add More Criteria</b> link.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p><b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options. To sort the results by the Non-cardholder (APC) role, select <b>Non-cardholder</b> from the <b>Role Types</b> drop-down list.</p> <p>3. From the <b>Username</b> column, click the link for the Non-cardholder you wish to view.</p> <p><i>The Non-Cardholders Details — User Account Information screen displays the user status, name, company, address, e-mail address, phone number, role, and entitlements.</i></p> <p><b>Note:</b> To perform a new search or return to your search results, from the breadcrumbs that display on top-left of the screen, position your mouse over the <b>ellipsis (...)</b> and click either <b>Search</b> or <b>Search Results</b>.</p>

Non-Cardholder (APC) Details Screen Overview

Screen	Step/Action
<p><b>Non-Cardholder (APC) Details Screen</b></p>	<ol style="list-style-type: none"> <li>Links displayed on the left-side of the screen can be used to perform additional actions on the account.</li> <li>A message and links will display at the top of the screen if the account has been inactivated or if the user has not registered in the CitiManager Site. If the account has been inactivated, you can click the <b>Activate User</b> link to activate the user. If the user has not registered in the CitiManager Site, the <b>Resend Registration Details</b> link displays.</li> <li>In the <b>User Account Information</b> section, the account status, account name, agency/ organization, address and contact information display.</li> <li>To view the agencies/organizations you share with the APC being viewed, click the <b>View Shared Companies</b> button.</li> <li>To edit the user’s CitiManager profile, including personal details, contact details, roles, hierarchy, and entitlements, click the <b>Edit CitiManager Profile</b> link.</li> <li>In the <b>Entitlements</b> section, the entitlements and role assigned to the Non-cardholder display.</li> </ol>



# View Statements and Recent Transactions

## Key Concepts

You can view a Cardholder’s current statement or a statement from previous months. You can also view recent transactions for a Cardholder that have posted to the account but have not yet been billed to a statement. Transaction data will be retained for the previous 72 statements. Statements that are three years or older are archived and a request needs to be submitted to download them.

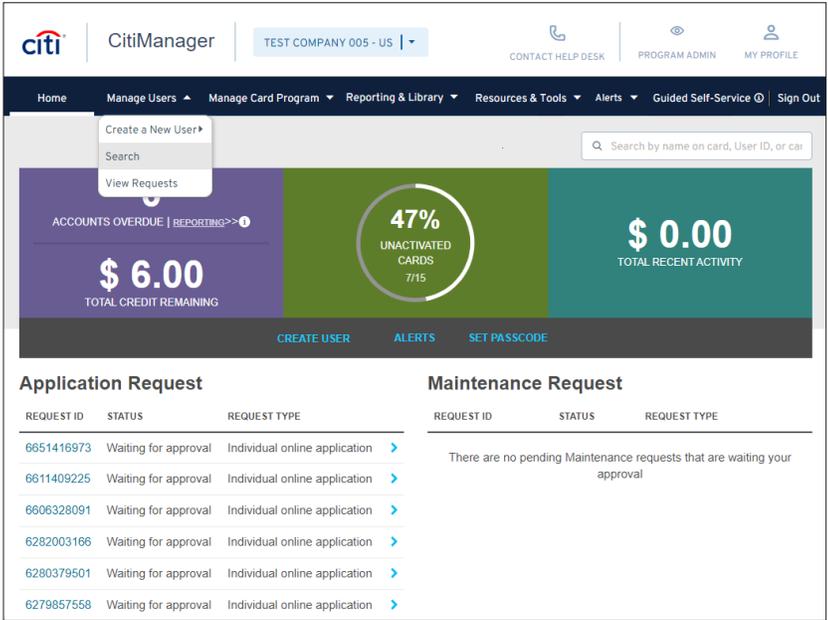
The **Recent Activity/Statements** section of the **Cardholder Details** screen displays the posting date, transaction date, transaction details, exchange rate, amount and status of recent transactions. You can expand each transaction to view additional detail that may have been sent to Citi from a merchant. Transaction detail includes the original currency amount, currency exchange rate and the conversion amount that was posted and may include items such as airline name, ticket and flight number.

Additionally, you can initiate a dispute if the transaction meets the requirements.

You can also perform an advanced search of billed transactions by status type, a specific date, a date range, description or amount.

You can download and print transactions for individually or centrally billed accounts. If you wish to print recent transactions, it’s recommended you download the transactions in Excel format. After you open the downloaded file, you can print it by selecting **Print** from the **File** menu.

## Step-By-Step Instructions

Screen	Step/Action
 <p>The screenshot shows the CitiManager Site Home Screen. At the top, there is a navigation bar with the Citi logo, 'CitiManager', and a dropdown menu for 'TEST COMPANY 005 - US'. Below this is a secondary navigation bar with links for Home, Manage Users, Manage Card Program, Reporting &amp; Library, Resources &amp; Tools, Alerts, Guided Self-Service, and Sign Out. A 'Manage Users' dropdown menu is open, showing options for 'Create a New User', 'Search', and 'View Requests'. The main content area features three large cards: 'ACCOUNTS OVERDUE   REPORTING' with a '\$ 6.00 TOTAL CREDIT REMAINING' card, a '47% UNACTIVATED CARDS 7/15' gauge chart, and a '\$ 0.00 TOTAL RECENT ACTIVITY' card. Below these are two tables: 'Application Request' and 'Maintenance Request'. The 'Application Request' table has columns for REQUEST ID, STATUS, and REQUEST TYPE, with six rows of data. The 'Maintenance Request' table has the same columns but contains the text 'There are no pending Maintenance requests that are waiting your approval'.</p>	<ol style="list-style-type: none"> <li>From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link.  <i>The Search screen displays.</i></li> </ol>



Screen	Step/Action
<p><b>Search Screen</b></p>	<p>2. To perform a search, type the desired search criteria and click the <b>Search</b> link.</p> <p><b>Note:</b> To search by <b>Employee ID</b>, <b>Status Type</b> or <b>Billing Type</b>, click the <b>Add More Criteria</b> link.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p><b>Note:</b> To sort the results by a column, click the column header name. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.</p> <p>3. From the <b>Username</b> column, click the link for the card account you wish to view.</p> <p><i>The Card Details screen displays.</i></p>



Screen	Step/Action
<p>The screenshot displays the 'Cardholder Details' page for a 'PVT TEST ACCOUNT'. Key sections include:</p> <ul style="list-style-type: none"> <li><b>Account Summary:</b> Citi Commercial Card - **00 0020. Current Balance: \$0.00, Available Credit: \$1.00, Credit Limit: \$1.00.</li> <li><b>Payment Due:</b> No Payment Due. Current Amount Due: \$0.00, Next Payment Due: 0.00 (Not Available).</li> <li><b>Payment History:</b> A table with columns for Date, Payment Amount, and Status. A note indicates the company will settle any balance related to business approved spend for this card.</li> <li><b>Recent Transactions:</b> A table with columns: Date, Transaction Date, Details, Exchange Rate, Amount, Status. A message states 'No transaction found for selected duration.' Below the table are links for 'Load More Transactions' and 'View All Transactions'.</li> <li><b>Card Contact Information:</b> Includes name (PVT TEST ACCOUNT), address (TEST MANAGER, 14000 CITI CARDS, FLORIDA, UNITED STATES OF AMERICA), and phone number (1234567890).</li> </ul>	<p>4. From the <b>Recent Transactions/Statements</b> section, select the statement date from the <b>Time Period</b> drop-down list. Ten transactions display by default. The transaction post date, transaction date, transaction details, exchange rate, transaction amount and status display.</p> <ul style="list-style-type: none"> <li>To view ten additional transactions on the <b>Cardholder Details</b> screen, click the <b>Load More Transactions</b> link.</li> <li>To view all transactions, click the <b>View All Transactions</b> link.</li> <li>To expand the transaction and view additional transaction information, click the arrow link on the right-side of the transaction.</li> <li>To view authorizations/declines, view the transaction status in the <b>Status</b> column (Posted, Pending, Declined, Diverted). To view additional information about a transaction and a decline reason, click the arrow link on the right-side of the transaction to expand it. Once the transaction is expanded, you can also click the <b>View More Details</b> button.</li> <li>To view a snapshot of additional account details, credit limits, balance and payment details, click the <b>Additional Statement Details</b> link.</li> <li>To perform an advanced search, click the <b>Advanced Search</b> link. From the <b>Advanced Search</b> screen, you can filter by status type, or a date range or search by a date, description or amount.</li> </ul> <p style="text-align: right;"><i>(continued)</i></p>

Card Details Screen



Screen	Step/Action
	<p><b>Note:</b> By default, the <b>Time Period</b> and <b>Search</b> fields are not available for input. To activate the fields, click the <b>Hide Advanced Search</b> link. To filter by <b>Date Range</b> or <b>Amount Range</b>, click the <b>Advanced Search</b> link to display these field.</p> <ul style="list-style-type: none"> <li>To download statements in either Comma Separated Value (CSV), Portable Document Format (PDF) or Excel (EXL) format, click the <b>Download Statement</b> link and select the desired option. If you intend to print the statement, PDF is the recommended format.</li> <li>To print, you can open downloaded file and select <b>Print</b> from the <b>File</b> menu.</li> </ul> <p><b>Note:</b> A request needs to be submitted to download statements that are three years or older. When you click on the statement date icon, a download request window displays. Click <b>Yes</b>, to confirm the request. After 24 hours, return to the Cardholder Details screen and click the statement date icon for the statement you downloaded to access the <b>View Archived Statements</b> screen. Click the <b>Download</b> link to download the statement to your computer.</p> <ul style="list-style-type: none"> <li>To initiate a dispute online, either select the checkbox for the transaction(s) and then click the <b>Dispute Charges</b> link or when the transactions is expanded, click the <b>Dispute Transaction</b> button.</li> <li>To view/attach/delete transaction documents, click the arrow link on the right-side of the transaction to expand it and then click the <b>Upload Receipt File</b> button.</li> </ul>
<b>Card Details Screen</b>	

# Perform Account Maintenance

## Key Concepts

Account Maintenance allows an APC to update Cardholder account information such as card address, Employee ID, credit limit, temporary spend controls, account status and Merchant Category Code Groups (MCCGs). For individuality billed accounts, an APC is not permitted to perform account maintenance on their own account.

You can maintain information such as the address, temporary credit limit, account status, Merchant Category Code Groups (MCCGs), mission critical status, and request replacement cards.

## Step-by-Step Instructions

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Search Screen



Screen	Step/Action
<p>The screenshot displays the 'Cardholder Details' screen for a Citi Commercial Card. At the top, it shows the current balance as \$0.00 and available credit as \$1.00. Below this, there are sections for 'Payment Due: No Payment Due', 'Payment History', and 'Aging of Balance'. The 'Recent Transactions' section is currently empty. At the bottom, there is a 'Card Contact Information' section with details for the cardholder and company. A prominent 'Edit / Account Maintenance' button is visible at the bottom right of the card details section.</p>	<ol style="list-style-type: none"> <li>Click the <b>Edit/Account Maintenance</b> button from the <b>Current Balance</b> section of the screen. <i>The Account Maintenance screen displays.</i></li> <li>From the <b>Card Information</b> section header, click the <b>Edit</b> link. <i>The Account Maintenance — Form Details screen displays.</i></li> </ol>
<p><b>Cardholder Details Screen</b></p>	



Screen	Step/Action
	<p>6. Complete the necessary updates to all sections of the form.</p> <p><b>Note:</b> You can maintain information such as the address, temporary credit limit, account status, mission critical dates, and MCCGs. International phone numbers cannot be added on the Account Maintenance screen. You can enter an international phone number on the <b>Update User</b> screen (Manage Users &gt; Search &gt; Cardholder Details &gt; Edit CitiManager Profile &gt; Contact Details) or on the <b>Alerts</b> screen (Manage Users &gt; Search &gt; Cardholder Details &gt; Update Alerts &gt; Mobile Phone Number — Edit).</p> <p>The <b>Temporary Cash Advance Limit Start Date</b> and <b>Temporary Credit Limit Start</b> fields are processed in real-time and can be updated 24 hours a day excluding weekends, Thanksgiving, Christmas and New Year’s.</p> <p>To add/remove an MCCG, click the <b>Add/Remove MCC Groups</b> link in the <b>Spending Controls</b> section. Select or deselect the checkbox(s) 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 <b>Update</b> button and then the <b>Back to Form</b> button.</p> <p>To close an account, from the <b>Account Status</b> drop-down list in the <b>Additional</b> section, select a closed status. The <b>Closed Temporary Block</b> status is equivalent to <b>Deactivate</b>. The only accounts that can be re-opened through the account maintenance process are those with a closed status of <b>Closed Temporary Block</b> (Used for things such as leave of absence or maternity leave). For all other closed statuses used, with the exception of <b>Closed Deceased</b>, a new application will need to be completed. When you select a closed status, an <b>Account Status Confirmation</b> message displays. Click either <b>Yes</b> or <b>No</b> to proceed.</p>
<p><b>Account Maintenance — Form Details Screen</b></p>	<p style="text-align: right;"><i>(continued)</i></p>

Screen	Step/Action												
<p>CREDIT LIMIT 1000</p> <p>SINGLE PURCHASE LIMIT FOR CARD 100</p> <p>CASH LIMIT 100</p> <p>EMPLOYEE ID BOLMTEST</p> <p>MASTER ACCOUNT CODE</p> <p>&gt;&gt; Update Master Accounting Code</p> <p>TEMPORARY CREDIT LIMIT</p> <p>TEMPORARY CREDIT LIMIT START DATE MM/DD/YYYY</p> <p>TEMPORARY CREDIT LIMIT END DATE MM/DD/YYYY</p> <p>MERCHANT CATEGORY CODE</p> <table border="1"> <thead> <tr> <th>MCC GROUP</th> <th>MCCG STATUS</th> <th>MCC GROUP ACTION</th> <th>MCC GROUP DIVERSION ACCOUNT</th> <th>SINGLE PURCHASE LIMIT FOR MCCG</th> <th>DAILY VOLUME LIMIT FOR MCCG</th> </tr> </thead> <tbody> <tr> <td>TEST999081</td> <td></td> <td>Include</td> <td></td> <td>0</td> <td>0</td> </tr> </tbody> </table> <p>&gt;&gt; Add/RemoveMCCgroups</p> <p>ORDER A REPLACEMENT CARD <input type="checkbox"/></p> <p>ACCOUNT COMMENTS §</p> <p><b>SUBMIT</b> <b>CANCEL</b> <b>VIEW HISTORY</b></p>	MCC GROUP	MCCG STATUS	MCC GROUP ACTION	MCC GROUP DIVERSION ACCOUNT	SINGLE PURCHASE LIMIT FOR MCCG	DAILY VOLUME LIMIT FOR MCCG	TEST999081		Include		0	0	<p>To put the account in mission critical status, enter the dates for mission critical status in the <b>Mission Critical Start Date</b> and <b>Mission Critical End Date</b> fields. The mission critical start date has to be greater than today's date and only occur on business days. Mission Critical can be set for up to 120 calendar days.</p> <p>If you need to add comments to explain the reasons for account changes, enter them in the <b>Account Comments</b> field on the maintenance form. You can enter a maximum of 500 characters in the field. You can view previous comments by clicking the <b>View History</b> button. This information is also fed to CitiManager — Reporting and is included in reporting.</p> <p>You may also initiate a card replacement in the CitiManager Site when a card has been lost, stolen, never received or damaged. Refer to the Replace Lost/Stolen/Never Received/Damaged Card topic in the CitiManager Non-cardholder End-to-End User Guide for additional information.</p> <p>7. When you are finished updating the form, click the <b>Submit</b> button.</p> <p><i>A confirmation message displays based on the maintenance performed.</i></p> <p>8. Click the <b>OK</b> button.</p> <p><i>A confirmation screen displays at the top of the screen.</i></p>
MCC GROUP	MCCG STATUS	MCC GROUP ACTION	MCC GROUP DIVERSION ACCOUNT	SINGLE PURCHASE LIMIT FOR MCCG	DAILY VOLUME LIMIT FOR MCCG								
TEST999081		Include		0	0								
<b>Account Maintenance — Form Details Screen</b>													

# Perform PCS Account Maintenance

## Key Concepts

A Permanent Change of Station (PCS) status is used to keep the account balance from aging while a Cardholder is moving to a new permanent duty location and extends the payment window for Cardholder.

The component’s policies determine whether Individually Billed Accounts (IBAs) will be used for PCS.

To place a Cardholder in PCS status, an APC must place the account into mission critical status and ensure the **PCS Status** indicator is set to Y.

Pending travel vouchers should be settled prior to an individual’s departure for PCS.

## Step-By-Step Instructions

Screen	Step/Action																											
<p><b>Application Request</b></p> <table border="1"> <thead> <tr> <th>REQUEST ID</th> <th>STATUS</th> <th>REQUEST TYPE</th> </tr> </thead> <tbody> <tr> <td>6651416973</td> <td>Waiting for approval</td> <td>Individual online application</td> </tr> <tr> <td>6611409225</td> <td>Waiting for approval</td> <td>Individual online application</td> </tr> <tr> <td>6606328091</td> <td>Waiting for approval</td> <td>Individual online application</td> </tr> <tr> <td>6282003166</td> <td>Waiting for approval</td> <td>Individual online application</td> </tr> <tr> <td>6280379501</td> <td>Waiting for approval</td> <td>Individual online application</td> </tr> <tr> <td>6279857558</td> <td>Waiting for approval</td> <td>Individual online application</td> </tr> </tbody> </table> <p><b>Maintenance Request</b></p> <table border="1"> <thead> <tr> <th>REQUEST ID</th> <th>STATUS</th> <th>REQUEST TYPE</th> </tr> </thead> <tbody> <tr> <td colspan="3">There are no pending Maintenance requests that are waiting your approval</td> </tr> </tbody> </table>	REQUEST ID	STATUS	REQUEST TYPE	6651416973	Waiting for approval	Individual online application	6611409225	Waiting for approval	Individual online application	6606328091	Waiting for approval	Individual online application	6282003166	Waiting for approval	Individual online application	6280379501	Waiting for approval	Individual online application	6279857558	Waiting for approval	Individual online application	REQUEST ID	STATUS	REQUEST TYPE	There are no pending Maintenance requests that are waiting your approval			<ol style="list-style-type: none"> <li>From the CitiManager Site side navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>Search</b> link.  <i>The Search screen displays.</i></li> </ol>
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<p><b>Search Results</b></p> <table border="1"> <thead> <tr> <th>Username</th> <th>First Name</th> <th>Last Name</th> <th>Card or Account...</th> <th>Card Status</th> <th>Billing Type</th> <th>Role</th> <th>User Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> --Unregister</td> <td>PVT</td> <td>TEST ACCOUNT</td> <td>..... 1652 27...</td> <td>Open</td> <td>CBC</td> <td>CARDHOLDER</td> <td>Pending</td> </tr> <tr> <td><input checked="" type="checkbox"/> kmtc005ch</td> <td>PVT</td> <td>TEST ACCOUNT</td> <td>..... 7596 09...</td> <td>Closed Not Used...</td> <td>CBC</td> <td>CARDHOLDER</td> <td>Activated</td> </tr> <tr> <td><input type="checkbox"/> --Unregister</td> <td>PVT</td> <td>TEST ACCOUNT</td> <td>..... 0000 00...</td> <td>Closed Not Used...</td> <td>CBC</td> <td>CARDHOLDER</td> <td>Pending</td> </tr> <tr> <td><input type="checkbox"/> kstat1005</td> <td>PVT</td> <td>TEST ACCOUNT</td> <td>..... 0000 00...</td> <td>Closed Not Used...</td> <td>CBC</td> <td>CARDHOLDER</td> <td>Activated</td> </tr> <tr> <td><input type="checkbox"/> --Unregister</td> <td>PVT</td> <td>TEST ACCOUNT</td> <td>..... 6985 88...</td> <td>Closed Not Used...</td> <td>CBC</td> <td>CARDHOLDER</td> <td>Pending</td> </tr> <tr> <td><input type="checkbox"/> --Unregister</td> <td>PVT</td> <td>TEST ACCOUNT</td> <td>..... 0381 90...</td> <td>Closed Not Used...</td> <td>CBC</td> <td>CARDHOLDER</td> <td>Pending</td> </tr> </tbody> </table>	Username	First Name	Last Name	Card or Account...	Card Status	Billing Type	Role	User Status	<input type="checkbox"/> --Unregister	PVT	TEST ACCOUNT	..... 1652 27...	Open	CBC	CARDHOLDER	Pending	<input checked="" type="checkbox"/> kmtc005ch	PVT	TEST ACCOUNT	..... 7596 09...	Closed Not Used...	CBC	CARDHOLDER	Activated	<input type="checkbox"/> --Unregister	PVT	TEST ACCOUNT	..... 0000 00...	Closed Not Used...	CBC	CARDHOLDER	Pending	<input type="checkbox"/> kstat1005	PVT	TEST ACCOUNT	..... 0000 00...	Closed Not Used...	CBC	CARDHOLDER	Activated	<input type="checkbox"/> --Unregister	PVT	TEST ACCOUNT	..... 6985 88...	Closed Not Used...	CBC	CARDHOLDER	Pending	<input type="checkbox"/> --Unregister	PVT	TEST ACCOUNT	..... 0381 90...	Closed Not Used...	CBC	CARDHOLDER	Pending	<p>2. To perform a search, type the desired search criteria and click the <b>Search</b> link.</p> <p><b>Note:</b> To search by <b>Employee ID</b>, <b>Status Type</b> or <b>Billing Type</b>, click the <b>Add More Criteria</b> link. To filter your results by status types, use the <b>Status Types</b> field to select/deselect sort options.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p>3. Click the checkbox for the account you wish to place in PCS status and then scroll down to the bottom of the screen and click the <b>Update PCS</b> button.</p> <p><i>The Account Maintenance Form Details screen displays.</i></p>
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<b>Search Screen</b>																																																									

Screen	Step/Action
<p>The screenshot shows the 'Account Maintenance' form in CitiManager. The 'PCS' section includes a dropdown for 'PCS INDICATOR' set to 'Y', and date pickers for 'MISSION CRITICAL START DATE' and 'MISSION CRITICAL END DATE'. The 'SPENDING CONTROLS' section has a text input for 'OVERALL CREDIT LIMIT' with the value '25'. Below that is a table for 'MCC GROUP' with two entries: '06659RETAI' and '06659TRAV'. There are also date pickers for 'TEMPORARY CREDIT LIMIT START DATE' and 'TEMPORARY CREDIT LIMIT END DATE'. At the bottom, there are 'SUBMIT' and 'CANCEL' buttons.</p>	<ol style="list-style-type: none"> <li>Verify the <b>PCS Indicator</b> is set to <b>Y</b> and update if necessary.</li> <li>From the <b>PCS</b> section, complete the <b>Mission Critical Start Date</b> and <b>Mission Critical End Date</b> fields of the form.                     <p><b>Note:</b> The mission critical start date has to be greater than today’s date and only occur on business days.</p> <p>The elapsed time between start and end date cannot exceed more than 120 calendar days.</p> </li> <li>Depending on the PCS, you may need to complete additional fields/sections such as:                     <ul style="list-style-type: none"> <li>Start <b>Pad Days</b> and <b>End Pad Days</b>. PAD days are the number of days you want to give a traveler as an extension to check in to their next duty station</li> <li>MCC Groups</li> <li><b>Temporary Credit Limit, Temporary Credit Limit, Start Date and Temporary Credit Limit End Date</b></li> </ul> </li> <li>When you are finished, click the <b>Submit</b> button.                     <p><i>A confirmation screen displays indicating the form has successfully processed.</i></p> </li> <li>Click the <b>OK</b> button.                     <p><i>The CitiManager Home screen displays.</i></p> </li> </ol>
<p><b>Account Maintenance — Form Details Screen</b></p>	

## Manage Application Requests (View Requests)

### Key Concepts

From the CitiManager Site Home screen **Application Request** section, applications awaiting your approval display. Applications for other APCs who are at your same hierarchy level also display. However, you are only able to approve or reject your own applications awaiting approval.

From the **View Request** screen you can also:

- Approve or reject an application
- Override an approval
- Delete an application request
- Download applications
- View Account Documents
- View audit

The option to approve and reject an application depends on the workflow and the status of the selected request.

The **Delete Application Request** link is only enabled when the **Select Request Type** is **Individual online application**, and the application status is not **Processed** or **Approved**.

### Request Status Descriptions

Request Status	Description
Approved	Application was approved by the APC and will be processed by Citi.
Draft	Application was saved but not submitted.
More Information Requested	Application was sent back by the approver requesting additional information.
Pending Final Review by Citi	Request was placed in queue for CAS to process (e.g. when two applications were submitted with the same social security number). This status is not updated in the CitiManager Site. Contact your CAS for the current status of the request.
Processed	Application was processed and a card will be issued.
Waiting for Approval	Online Card Application request is awaiting non-cardholder approval.
Waiting for Approver1 Approval	Application is awaiting Approver1 approval.

### Step-By-Step Instructions

Screen	Step/Action
<p>The screenshot shows the CitiManager Site Home Screen. At the top, there is a navigation bar with the Citi logo, 'CitiManager', and a dropdown menu for 'TEST COMPANY 005 - US'. Below the navigation bar, there are several menu items: Home, Manage Users, Manage Card Program, Reporting &amp; Library, Resources &amp; Tools, Alerts, Guided Self-Service, and Sign Out. A search bar is located below the navigation bar. The main content area features three large cards: 'View Requests' with a 'NOT AVAILABLE ACCOUNTS OVERDUE' warning and '\$ 10.00 TOTAL CREDIT REMAINING'; '0% UNACTIVATED CARDS 0/2'; and '\$ 0.00 TOTAL RECENT ACTIVITY'. Below these cards are buttons for 'CREATE USER', 'ALERTS', and 'SET PASSCODE'. At the bottom, there are two tables: 'Application Request' and 'Maintenance Request'. Both tables have columns for 'REQUEST ID', 'STATUS', and 'REQUEST TYPE'. The 'Application Request' table lists several requests with IDs like 6124017465 and 6123307859, all with a status of 'Waiting for approval'. The 'Maintenance Request' table shows one request with ID 6104427890, also with a status of 'Waiting for approval'.</p>	<p>1. From the navigation bar, position your mouse over the <b>Manage Users</b> drop-down menu and click the <b>View Requests</b> link,</p> <p>OR</p> <p>From the <b>Home</b> screen <b>Application Request</b> section, click desired <b>Request ID</b> link and continue to Step 5.</p>
<p><b>CitiManager Site Home Screen</b></p>	

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<p><b>SEARCH FOR REQUESTS</b></p> <p>VIEWING 1-20 OF 51   1 2 3 &gt;</p> <table border="1"> <thead> <tr> <th>REQUEST ID</th> <th>NAME</th> <th>STATUS</th> <th>REQUEST TYPE</th> <th>LAST MODIFIED DATE</th> </tr> </thead> <tbody> <tr><td>6635969840</td><td>PVT TEST ACCOUNT</td><td>Processed</td><td>Individual online maintenance</td><td>09/23/2025 12:04:51 AM</td></tr> <tr><td>6596637824</td><td>PVT TEST ACCOUNT</td><td>Processed</td><td>Individual online maintenance</td><td>07/12/2024 11:36:21 AM</td></tr> <tr><td>6596605086</td><td>PVT TEST ACCOUNT</td><td>Processed</td><td>Individual online maintenance</td><td>09/23/2025 1:12:00 AM</td></tr> <tr><td>6596604501</td><td>PVT TEST ACCOUNT</td><td>Processed</td><td>Individual online maintenance</td><td>07/12/2024 11:11:20 AM</td></tr> <tr><td>6516398432</td><td>PVT TEST ACCOUNT</td><td>Processed</td><td>Individual online maintenance</td><td>10/24/2023 11:36:18 AM</td></tr> <tr><td>6516397798</td><td>PVT TEST 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<li><input type="checkbox"/> Approved</li> <li><input type="checkbox"/> Draft</li> <li><input type="checkbox"/> More information required</li> <li><input type="checkbox"/> Processed</li> <li><input type="checkbox"/> Rejected</li> <li><input type="checkbox"/> Waiting for approval</li> <li><input type="checkbox"/> Waiting for Signed Copy</li> </ul> <p><b>REFINE SEARCH</b></p>	REQUEST ID	NAME	STATUS	REQUEST TYPE	LAST MODIFIED DATE	6635969840	PVT TEST ACCOUNT	Processed	Individual online maintenance	09/23/2025 12:04:51 AM	6596637824	PVT TEST ACCOUNT	Processed	Individual online maintenance	07/12/2024 11:36:21 AM	6596605086	PVT TEST ACCOUNT	Processed	Individual online maintenance	09/23/2025 1:12:00 AM	6596604501	PVT TEST ACCOUNT	Processed	Individual online maintenance	07/12/2024 11:11:20 AM	6516398432	PVT TEST ACCOUNT	Processed	Individual online maintenance	10/24/2023 11:36:18 AM	6516397798	PVT TEST ACCOUNT	Processed	Individual online maintenance	10/24/2023 11:34:01 AM	6596637824	PVT TEST 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PM	6432234869	PVT TEST ACCOUNT	Processed	Individual online maintenance	03/04/2023 04:02:34 AM	6432214747	PVT TEST ACCOUNT	Processed	Individual online maintenance	03/03/2023 02:40:05 PM	6253537572	PVT TEST ACCOUNT	Processed	Individual online maintenance	08/13/2021 01:48:18 PM	6182289774	PVT TEST ACCOUNT	Processed	Individual online maintenance	10/20/2020 09:50:33 AM	6182289966	PVT TEST ACCOUNT	Rejected by processor	Individual online maintenance	10/20/2020 09:48:11 AM	6154235375	PVT TEST ACCOUNT	Processed	Individual online maintenance	06/22/2020 01:25:23 PM	6154183443	PVT TEST ACCOUNT	Processed	Individual online maintenance	06/22/2020 10:28:01 AM	<p>2. To perform a search, type the desired search criteria and click the <b>Search</b> button.</p> <p><b>Note:</b> To perform an advanced search use the <b>User Name, From Date</b> and <b>To Date</b> fields.</p> <p>To search for users at a specific hierarchy level, click the <b>Lookup Hierarchy</b> link. If necessary, click the <b>(+) plus sign</b> icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the <b>Select</b> button.</p> <p><i>The search results display at the bottom of the screen.</i></p> <p><b>Note:</b> A maximum of 1,200 requests can display in the search results. If there more than 1,200 requests based on the search criteria entered, a message will display at the top the screen and you will have to further refine your search.</p> <p>3. To further filter the requests by type or status, select the desired checkbox(es) in the <b>Refine by Request Type</b> or <b>Refine by Status</b> sections displayed on the left-side of the screen.</p> <p><b>Note:</b> De-select the <b>All</b> checkboxes first to activate the sort option checkboxes.</p> <p><i>The requests displayed are filtered by the options selected.</i></p> <p>4. To view a request, from the <b>Request ID</b> column, click the link for the request you wish to view.</p> <p><i>The View Request screen displays.</i></p>
REQUEST ID	NAME	STATUS	REQUEST TYPE	LAST MODIFIED DATE																																																																																																																										
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**Search for Requests Screen**

Screen	Step/Action
	<p>5. Review the application details.</p> <p><b>Note:</b> You can view the audit log or view account documents by clicking the link that displays on the right-side of the screen. Ensure the correct hierarchy is selected by clicking on the <b>Select Hierarchy</b> link. The card type should be <b>DoD IB Card</b> and the <b>Billing Office Code</b> must begin with the number 71 and end with the last five digits of your 2nd level hierarchy number (Independent Agencies Billing Office Code will be the number 71 plus the last 5 digits of their 3rd hierarchy level number).</p> <p>6. When you are finished reviewing the application, select either the <b>Approve</b> or <b>Reject</b> radio button.</p> <p><b>Note:</b> If the application is rejected, you are required to type a reason for the rejection in the <b>Comments</b> field and then click the <b>Save</b> comment link. Comments are required if the application is rejected or if the applicant did not authorized a soft credit score. The comment should indicate that DD Form 2283 was received and filed locally with the APC. By default, the <b>Allow for Resubmit</b> checkbox is selected. De-select the checkbox if resubmission is not allowed.</p> <p>If you were the intended APC for this application and it was submitted to you as the Supervisor (Approver1) by mistake, do not reject the application. First, remember that if you are seeing the application as an Supervisor (Approver1), you are no longer in your Prog Admin (APC) role screen. You are in your Supervisor (Approver1) role, which may have been created for you automatically when the applicant used your e-mail address. You should use the toggle on the top-right corner of the screen to switch to your Prog Admin role. Refer to the Override Approval topic in this User Guide for the steps to send the application back to the correct Supervisor (Approver1).</p> <p>7. When you are finished, click the <b>Submit</b> button.  <i>A confirmation message displays.</i></p>

**View Request Screen**

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