

Online Applications Quick Start Guide for Cardholders

Department of Defense

CitiManager

July 2023

Treasury and Trade Solutions





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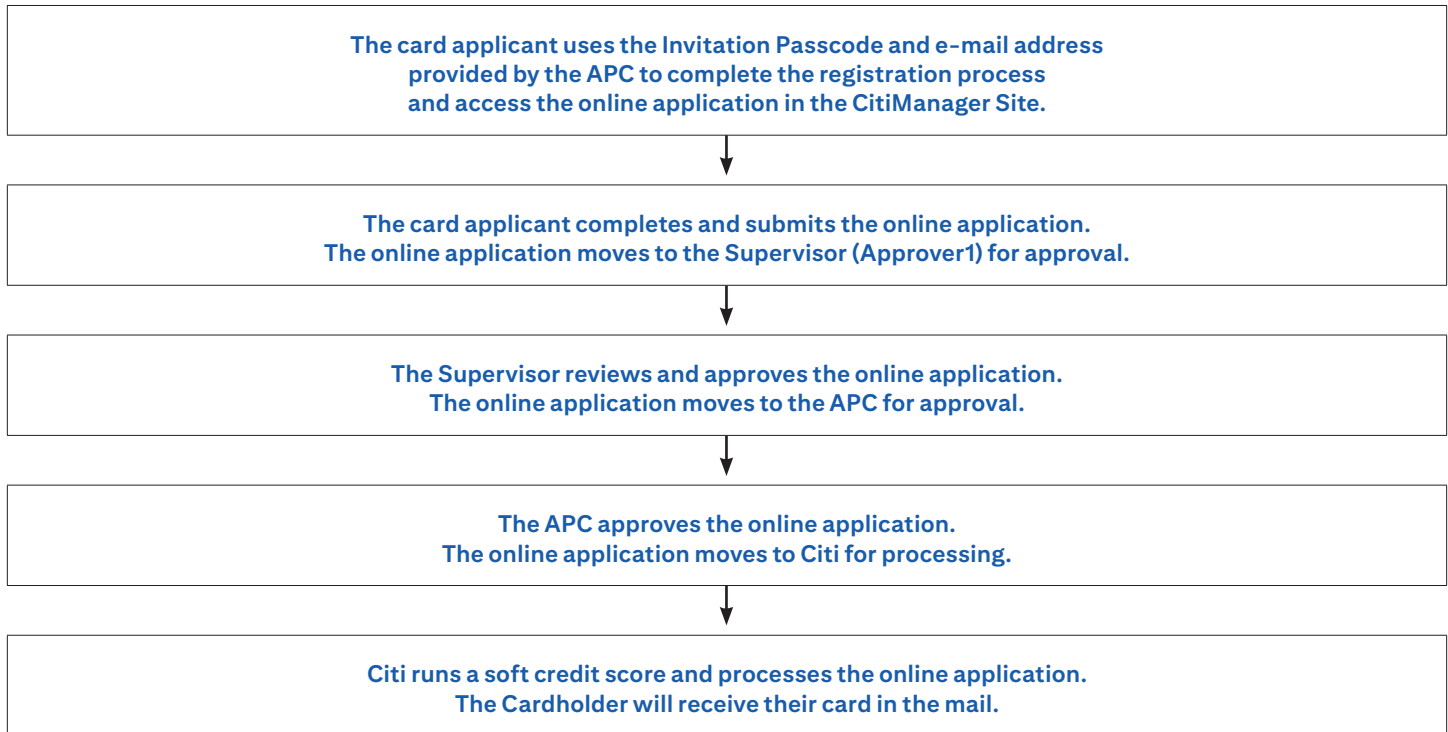
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Introduction

The online application work-flow below describes each step of the online application process and identifies key responsibilities.

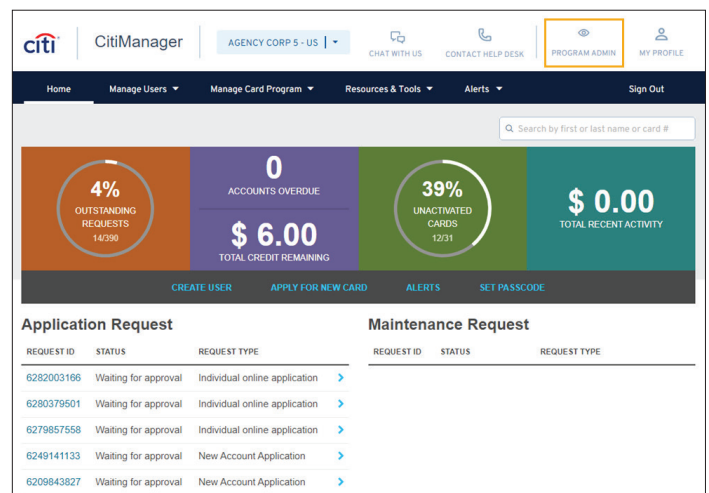
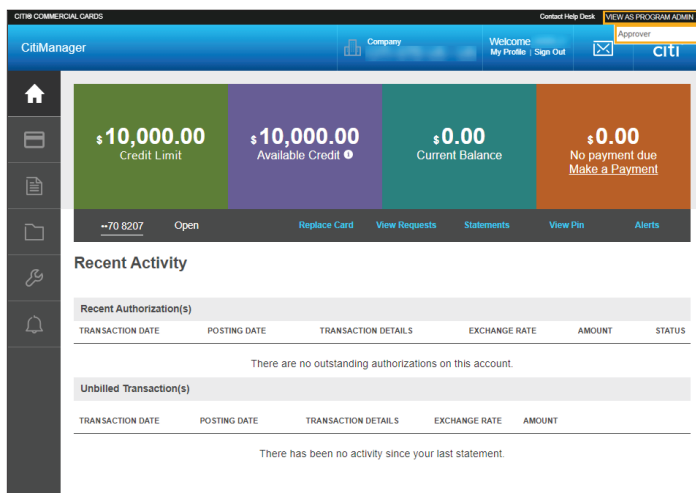
Note: The online application might be rejected or deleted by the Supervisor or APC. Please communicate with your Supervisor or APC if this happens.



Toggle Between Roles

If you have access to the CitiManager site for multiple roles, you have to toggle between those accounts using the drop-down list that displays in the top-right corner of the screen.

You may have Cardholder (CH), Program Administrator (APC), or Approver_1 (Supervisor) access depending on your roles.



Apply for Card Using an Invitation Passcode

Key Concepts

Before you can apply for a new card, an Invitation Passcode and the inviter's e-mail address are required to register in the CitiManager Site and access the online application. Both are obtained from your Agency Program Coordinator (APC).

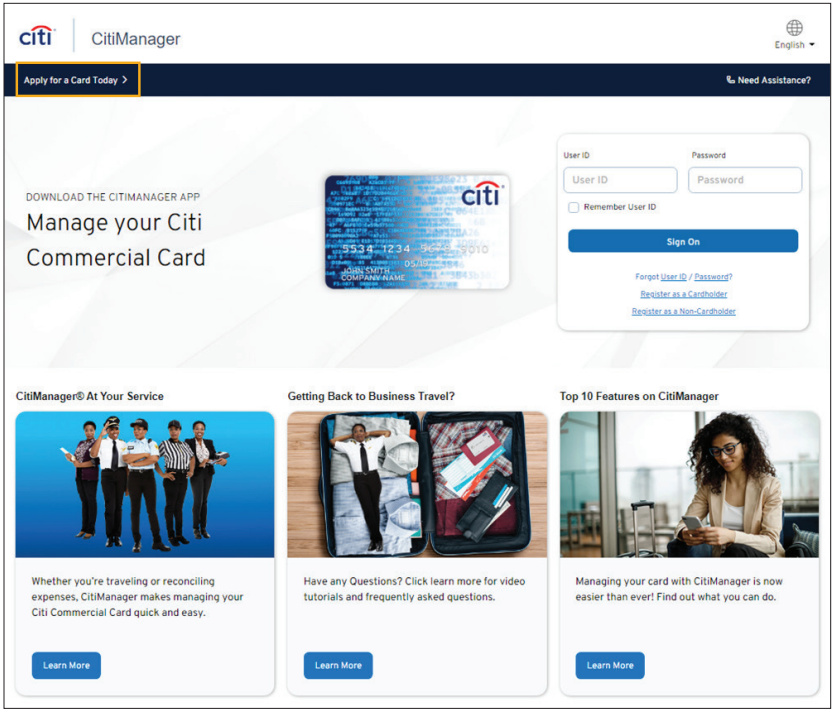
When completing the online application you will be prompted to enter your Supervisor's (Approver1) e-mail address. Be sure to enter your Supervisor's e-mail address. **Do not enter your APC's e-mail address.**

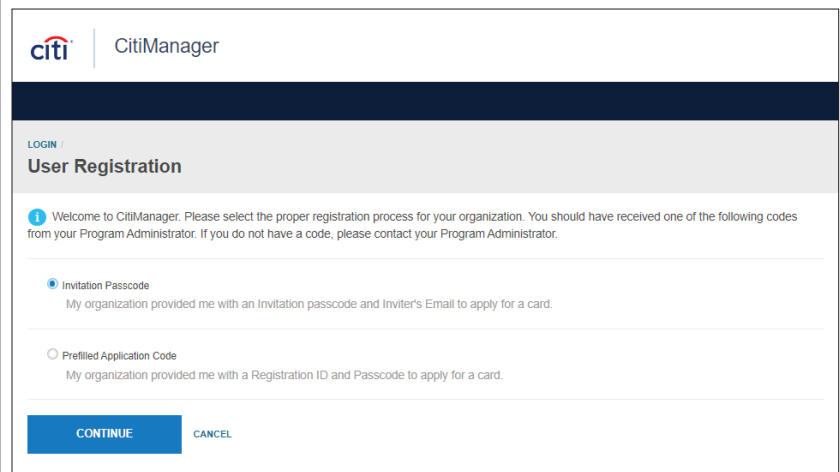
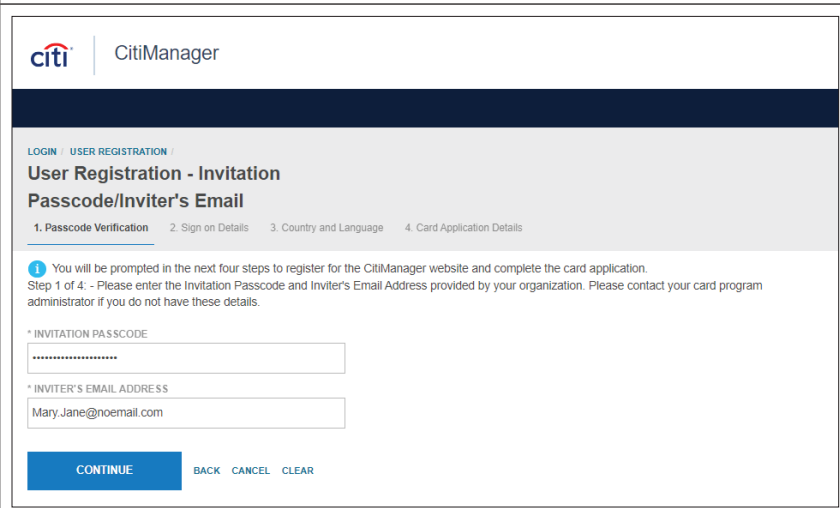
Once you submit your application, you will receive automated confirmation e-mails when your Supervisor and APC approve your application.

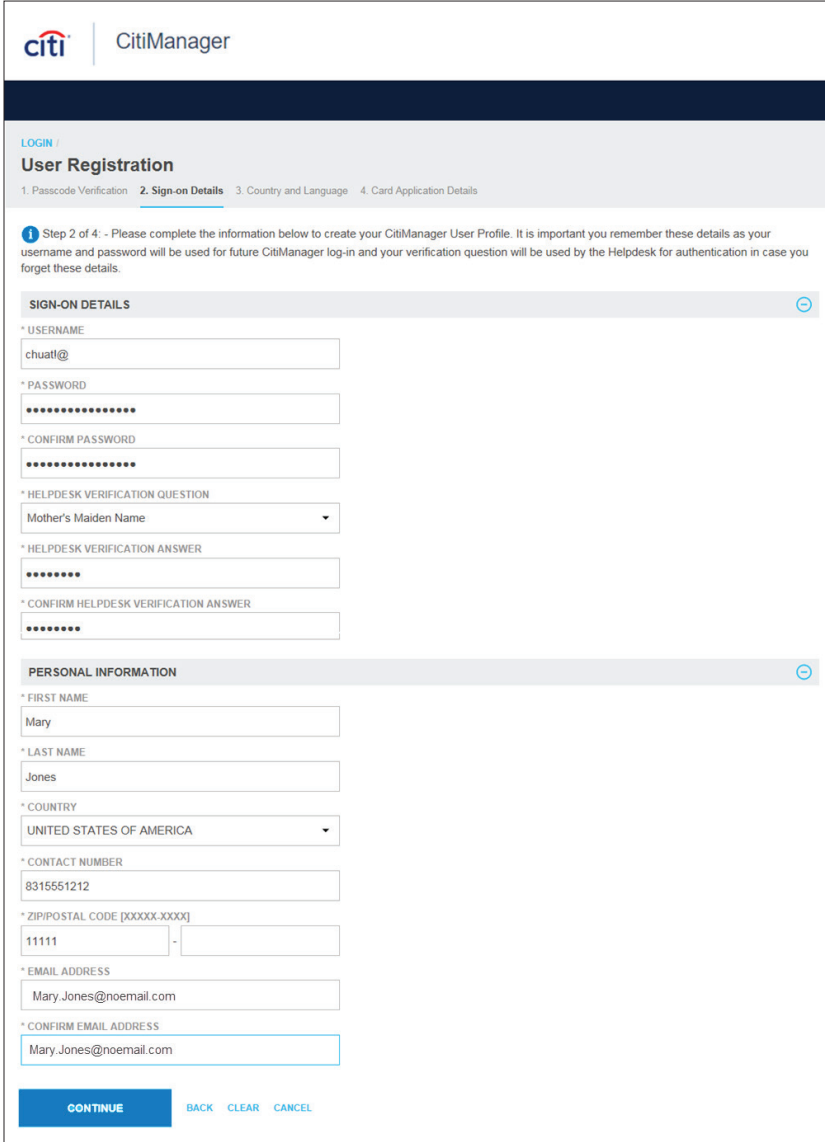
You can view the status of your application in the CitiManager Site by using the username and password created during the application process to log in and navigate to **My Profile > Request History**. Refer to the **View Application and Maintenance Request History** topic in this user guide for additional information.

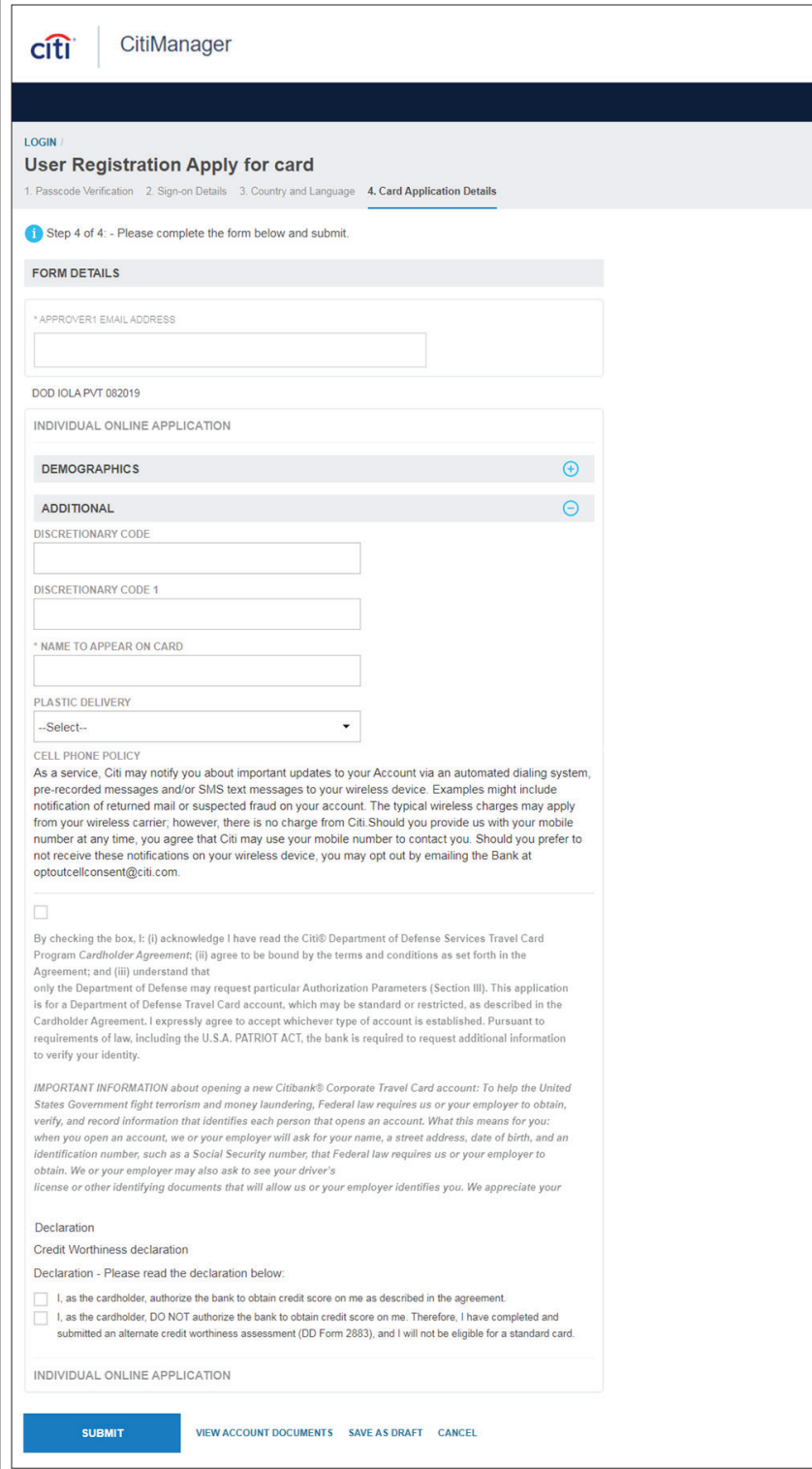
Once your card application is approved, the account will be linked to the CitiManager Site username and password that was created during the application process. This will allow you to log in to the CitiManager Site to view balances, credit limits, statements and perform other self-service tasks.

Step-by-Step Instructions

Screen	Step/Action
	<ol style="list-style-type: none"> 1. Navigate to citimanager.com/login. 2. From the CitiManager Site Login screen header, click the Apply for a Card Today link. <i>The User Registration screen displays.</i>

Screen	Step/Action
 <p>The screenshot shows the CitiManager 'User Registration' screen. It has a header with the Citi logo and 'CitiManager'. Below is a dark blue bar with 'LOGIN' and 'User Registration'. A message states: 'Welcome to CitiManager. Please select the proper registration process for your organization. You should have received one of the following codes from your Program Administrator. If you do not have a code, please contact your Program Administrator.' There are two radio button options: 'Invitation Passcode' (selected) with the description 'My organization provided me with an Invitation passcode and Inviter's Email to apply for a card.' and 'Prefilled Application Code' with the description 'My organization provided me with a Registration ID and Passcode to apply for a card.' At the bottom are 'CONTINUE' and 'CANCEL' buttons.</p>	<p>3. Select the Invitation Passcode radio button and click the Continue button.</p> <p><i>The User Registration — Invitation Passcode/ Inviter's Email screen displays.</i></p>
 <p>The screenshot shows the 'User Registration - Invitation Passcode/Inviter's Email' screen. It has a header with the Citi logo and 'CitiManager'. Below is a dark blue bar with 'LOGIN' and 'USER REGISTRATION'. The title is 'User Registration - Invitation Passcode/Inviter's Email'. There are four tabs: '1. Passcode Verification' (active), '2. Sign on Details', '3. Country and Language', and '4. Card Application Details'. A message states: 'You will be prompted in the next four steps to register for the CitiManager website and complete the card application. Step 1 of 4: - Please enter the Invitation Passcode and Inviter's Email Address provided by your organization. Please contact your card program administrator if you do not have these details.' There are two input fields: '* INVITATION PASSCODE' and '* INVITER'S EMAIL ADDRESS' (containing 'Mary.Jane@noemail.com'). At the bottom are 'CONTINUE', 'BACK', 'CANCEL', and 'CLEAR' buttons.</p>	<p>4. In the Invitation Passcode field, type the Invitation Passcode that was provided to you by your APC.</p> <p>Note: The Invitation Passcode field is case sensitive.</p> <p>5. In the Inviter's Email Address field, type the Inviter's Email address sent to you by your APC.</p> <p>Note: This is typically the APC who sent you the invitation passcode. Usually, this is not your Supervisor (Approver1).</p> <p>6. Click the Continue button.</p> <p><i>The User Registration — Sign-on Details screen displays.</i></p> <p>Note: All new applicants are required to create a CitiManager Site user profile during the application process.</p>

Screen	Step/Action
 <p>User Registration</p> <p>1. Passcode Verification 2. Sign-on Details 3. Country and Language 4. Card Application Details</p> <p>Step 2 of 4: - Please complete the information below to create your CitiManager User Profile. It is important you remember these details as your username and password will be used for future CitiManager log-in and your verification question will be used by the Helpdesk for authentication in case you forget these details.</p> <p>SIGN-ON DETAILS</p> <p>* USERNAME chuatl@</p> <p>* PASSWORD *****</p> <p>* CONFIRM PASSWORD *****</p> <p>* HELPDESK VERIFICATION QUESTION Mother's Maiden Name</p> <p>* HELPDESK VERIFICATION ANSWER *****</p> <p>* CONFIRM HELPDESK VERIFICATION ANSWER *****</p> <p>PERSONAL INFORMATION</p> <p>* FIRST NAME Mary</p> <p>* LAST NAME Jones</p> <p>* COUNTRY UNITED STATES OF AMERICA</p> <p>* CONTACT NUMBER 8315551212</p> <p>* ZIP/POSTAL CODE [XXXXX-XXXX] 11111 -</p> <p>* EMAIL ADDRESS Mary.Jones@noemail.com</p> <p>* CONFIRM EMAIL ADDRESS Mary.Jones@noemail.com</p> <p>CONTINUE BACK CLEAR CANCEL</p>	<p>7. Complete the required fields in the Sign-on Details and Personal Information sections.</p> <p>Note: The password and username requirements display in a window as you type your password. A checkmark displays when the requirements are fulfilled.</p> <p>8. Click the Continue button.</p> <p><i>A confirmation message displays indicating your user ID has been created.</i></p> <p>The CitiManager Site sends an e-mail confirming the registration and username created.</p>
User Registration Screen — Sign-on Details	

Screen	Step/Action
 <p>Screen: The screenshot shows the 'User Registration Apply for card' screen in CitiManager. It is Step 4 of 4: Card Application Details. The screen includes a 'FORM DETAILS' section with fields for 'APPROVER1 EMAIL ADDRESS', 'DISCRETIONARY CODE', and 'NAME TO APPEAR ON CARD'. There is also a 'CELL PHONE POLICY' section with a checkbox and text. At the bottom, there is a 'Declaration' section with two checkboxes: 'I, as the cardholder, authorize the bank to obtain credit score on me as described in the agreement.' and 'I, as the cardholder, DO NOT authorize the bank to obtain credit score on me. Therefore, I have completed and submitted an alternate credit worthiness assessment (DD Form 2883), and I will not be eligible for a standard card.' The 'SUBMIT' button is highlighted in blue.</p>	<p>10. Complete the required fields in all sections of the application. Required fields are indicated by an asterisk (*). Click the (+) plus sign icon from the section headers to expand the sections if necessary.</p> <p>Note: Make sure to type your Supervisor's e-mail in the Approver1 Email Address field, not your APC's e-mail. Your Supervisor is the Approver1. In the Credit Worthiness Declaration section, select the authorize checkbox to allow Citi to pull a soft credit score. Your credit will not be negatively impacted by this. If you do not authorize the soft credit pull, select the do not authorize option. If you do not consent to the soft pull credit score, DD Form 2883 must be completed, signed by you, the Supervisor (Approver1), and the APC. This document must be retained on file by the APC. This form should not be uploaded to the your Account Documents. Contact your APC for the most current DD Form 2883.</p> <p>11. When you are finished, click the Submit button that displays at the bottom of the screen.</p> <p><i>An application submission confirmation message displays.</i></p> <p>12. Click the OK button.</p> <p><i>The CitiManager Login screen displays.</i></p> <p>Note: The approving Supervisor will receive an e-mail indicating your application is awaiting their approval.</p>

User Registration Apply for Card — Card Application Details

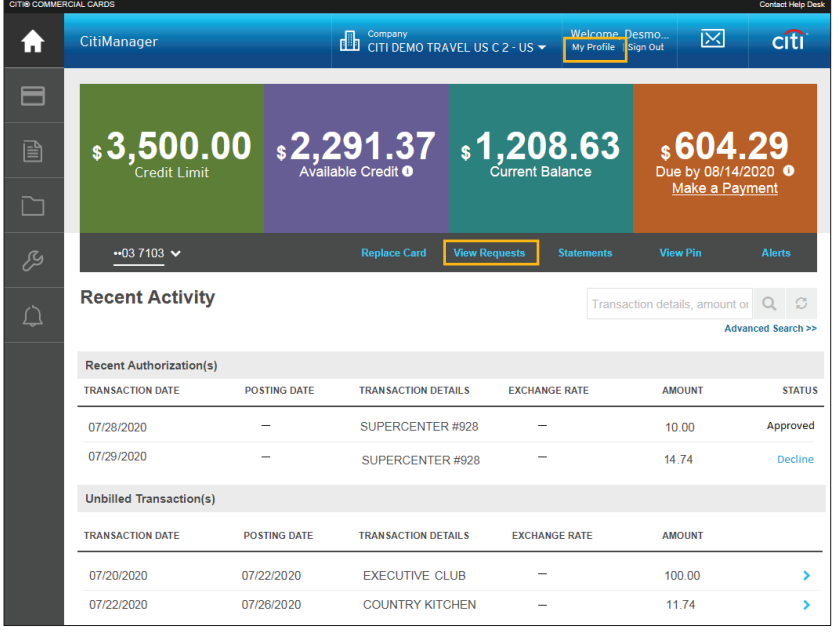
View Application History

Key Concepts

You can view information about your account application and maintenance requests including the following information:

- Request ID
- Status
- Request Type
- The date the request was last modified
- Audit information such as which fields have changed, when they were updated and by whom
- Hierarchy

Step-by-Step Instructions

Screen	Step/Action
 <p>Home Screen</p>	<ol style="list-style-type: none"> From the CitiManager Site header, click the My Profile link that displays under your name. <p>Note: Requests can also be accessed by clicking the View Requests link displayed on the black bar in the middle of the screen.</p> <p><i>The Contact Information screen displays.</i></p>

Screen

Step/Action

The screenshot shows the CitiManager interface. At the top, there's a header with 'CitiManager', a company logo, and user information 'Welcome, John My Profile | Sign Out'. Below the header is a sidebar with navigation links: HOME, CONTACT INFORMATION, USER ROLE AND HIERARCHY, ENTITLEMENTS, USER PREFERENCES, CHANGE PASSWORD, RESET CHALLENGE QUESTIONS, MERGE USERNAMES, CHANGE PRIMARY COMPANY, LINK/UNLINK CARD ACCOUNT, APPLY FOR NEW CARD, and REQUEST HISTORY (highlighted with a yellow box). The main content area is titled 'My Profile: User Preferences' and contains a form with various fields for updating preferences. A message at the top of the form says 'Update your preferences. The fields marked with an asterisk (*) are mandatory.' The form includes sections for 'SELECT YOUR HELP DESK VERIFICATION QUESTION' (with a 'Date of Hire' dropdown), 'YOUR ANSWER', 'CONFIRM YOUR ANSWER', 'PREFERRED LANGUAGE (FOR CORRESPONDENCE)' (with an 'ENGLISH' dropdown), 'PREFERRED HIERARCHY SORTING' (with a 'UNIT NUMBER' dropdown), 'PREFERRED DATE FORMAT' (with a 'MM/DD/YYYY' dropdown), 'PREFERRED TIME FORMAT' (with a '12hr clock' dropdown), and 'PREFERRED TIME ZONE' (with a 'GMT-Greenwich Mean Time' dropdown).

My Profile — Contact Information

2. Click the **Request History** link.

A list of application and maintenance requests display.

Note: If there are no requests, a message displays indicating there are no requests for this user.

The screenshot shows the CitiManager interface with the 'REQUEST HISTORY' link selected in the sidebar. The main content area is titled 'My Profile: Request History' and displays a table of application and maintenance requests. Above the table, there's a message 'List of Application and Maintenance Requests' and a 'DOWNLOAD (XtIs)' link. The table has columns for REQUEST ID, STATUS, REQUEST TYPE, LAST MODIFIED DATE, and MODIFIED BY. The first row shows a request with ID '6118343588', status 'Waiting for approver1 approval', type 'Individual online application', last modified '12/16/2019 11:14:50', and modified by 'John Lepew'. Below the table, there's a section for 'NAME', 'HIERARCHY', and 'RESUBMITTED' with values 'John Lepew', 'CE_NAVY IB', and 'No' respectively.

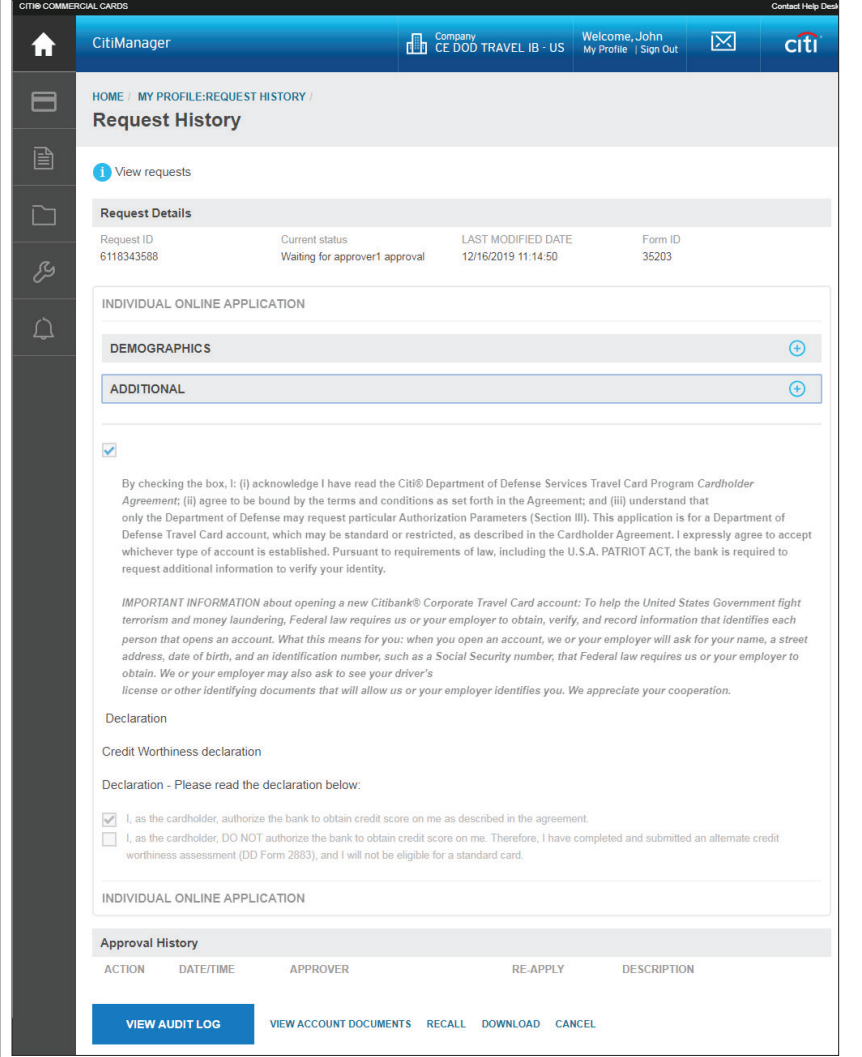
My Profile — Request History

3. To sort requests, click on the header in which you'd like to sort the requests.

4. To view the hierarchy, expand the row for the desired request by clicking the **Ellipsis (...)** link that displays to the right of the row you wish to expand.

5. To view the details of a specific request, from the **Request ID** column, click the link for the desired request.

The application or maintenance request details display with the approval history.

Screen	Step/Action
	<ol style="list-style-type: none"> 6. To view additional information from the Contact Information, Additional Information, Spending Controls sections or to view the CitiManager Cardholder Account Agreement, click the (+) plus sign icon from the section headers to expand the sections if necessary. 7. To view the Audit Log, scroll to bottom of screen click the View Audit Log button. <i>The Audit Log displays.</i> 8. To view/upload attachments, click the View Account Documents link. Note: The DD Form 2883 and any other documents with Personal Information are not to be uploaded as attachments. 9. To pull the application back to draft status to make changes to the fields, click the Recall link. Note: Once the application is recalled, the form becomes available to edit and make changes. Once you are finished, click the Submit button and the application will move to the Supervisor (Approver1) and APC for approval. 10. To generate a PDF version of the application, click the Download link.
My Profile — Request Details	

Screen

CitiManager

HOME / MY PROFILE: REQUEST HISTORY / **View Audit Log**

View applications and maintenance request audit history.

Viewing 1-10 of 25 | < | 1 | 2 | 3 | > |

Date & Time Of Change	Changed By	Type Of Update	Updated Field	Old Value	New Value	Messages	FIELD STATUS
12/16/2019 03:14:51 PM	lepew123	Status	NA	Draft	Waiting for approver1 approval		
12/16/2019 03:01:58 PM	Lepew123	Status	NA	Initiate	Draft		
12/16/2019 03:01:58 PM	Lepew123	Field	First Name	John			
12/16/2019 03:01:58 PM	Lepew123	Field	Last Name	Lepew			
12/16/2019 03:01:58 PM	Lepew123	Field	Social Security Number	XXXXXXXXXX			
12/16/2019 03:01:58 PM	Lepew123	Field	Date of Birth	*****			
12/16/2019 03:01:58 PM	Lepew123	Field	Mailing Address Line 1	9870 Somewhere Dr			
12/16/2019 03:01:58 PM	Lepew123	Field	Mailing City	Norfolk			
12/16/2019 03:01:58 PM	Lepew123	Field	Mailing Country	UNITED STATES OF AMERICA			
12/16/2019 03:01:58 PM	Lepew123	Field	Mailing State		VIRGINIA		

Viewing 1-10 of 25 | < | 1 | 2 | 3 | > |

BACK

Audit Log

Step/Action

11. When you are finished viewing the **Audit Log**, scroll to the bottom of the screen and click the **Back** button.

Note: To return to the list of maintenance requests, click the **Cancel** link at the bottom of the screen then click the **OK** button.

Audit Log

