# Online Maintenance Quick Start Guide for Non-cardholders

Department of Defense

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Treasury and Trade Solutions

# Table of Contents

# Update User — Personal and Contact Details, User Roles, Hierarchy and Entitlements

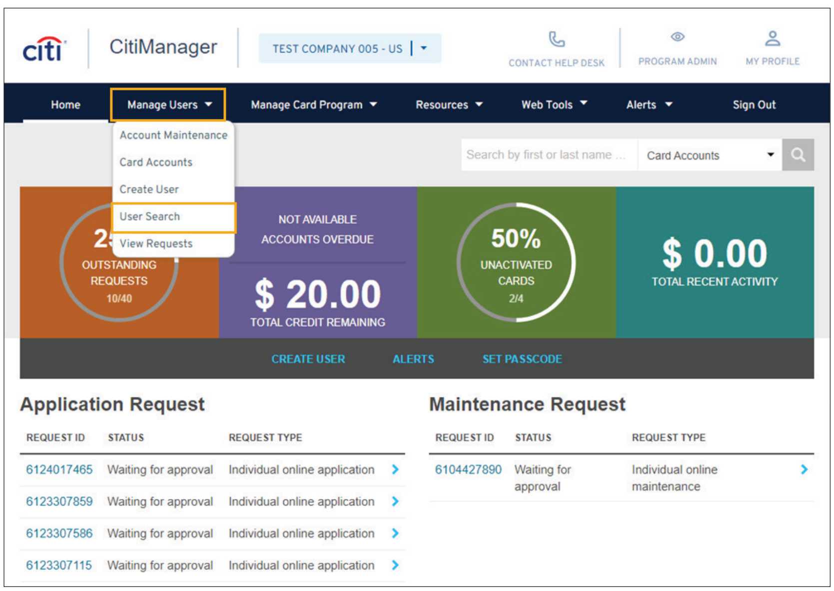
## Key Concepts

It is possible to update a user's personal details, contact details, their roles, hierarchy and the entitlements assigned to them. Details that can be updated include:

- **Personal Details** — Username, first and last name
- **Contact Details** — Address, phone number, e-mail address
- **User Roles and Hierarchy** — Roles such as Cardholder and Non-cardholder and hierarchy assigned to the role
- **Entitlements** — Entitlements assigned to the user

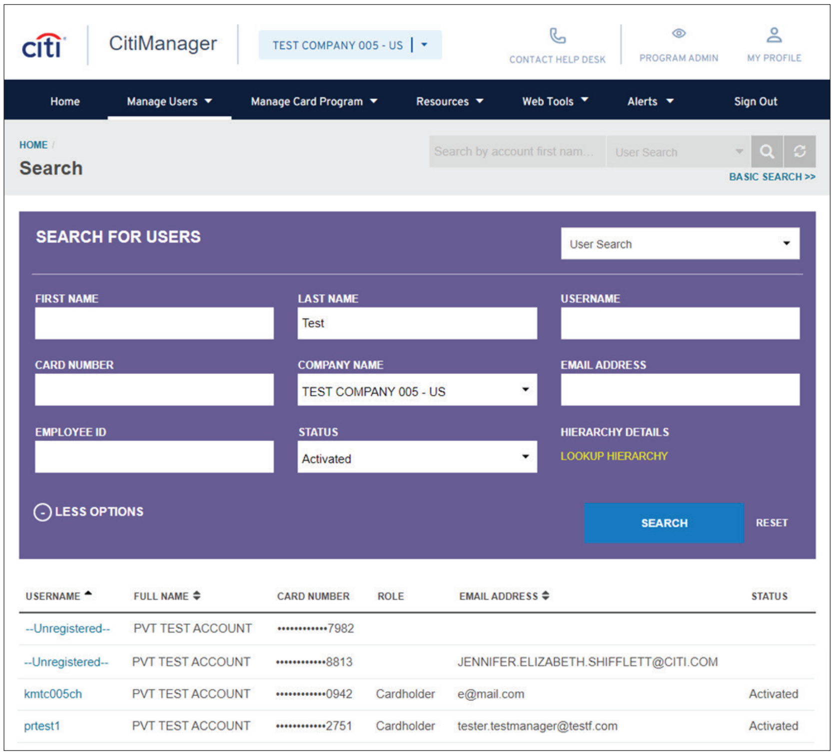
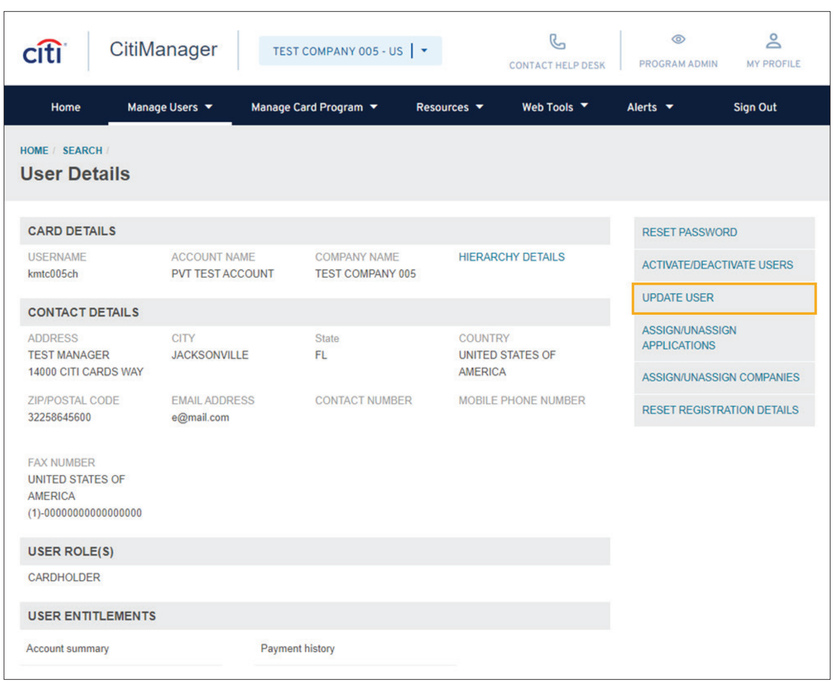
You can only assign additional entitlements to another user if you are already entitled yourself. You cannot change your own entitlements.

## Step-By-Step Instructions

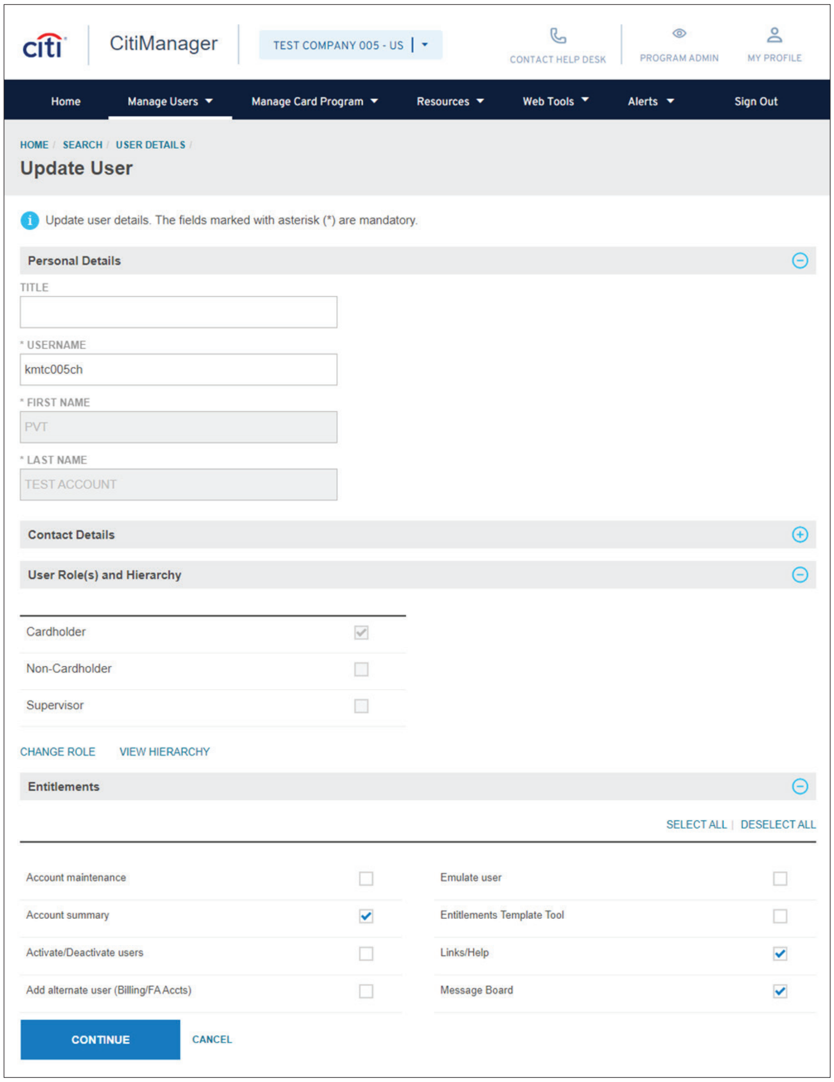
<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>



**CitiManager Site Home Screen**
</td><td>
1. From the navigation bar, position your mouse over the Manage Users drop-down menu and click the User Search link.

The Search for Users screen displays.
</td></tr>
</table>

| Screen | Step/Action |
|---|---|
|  <br>**Search for Users Screen** | 2. To perform a search, type the desired search criteria in the **First Name**, **Last Name** or **Username** fields and click the **Search** button.<br>**Note:** To perform an advanced search using the **Card Number**, **Company Name**, **Email Address**, **Employee ID** and **Status** fields, click the **More Options** button.<br>To search for users at a specific hierarchy level, click the **Lookup Hierarchy** link. If necessary, click the **(+) plus sign** icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the **Select** button.<br>*The search results display at the bottom of the screen.*<br>**Note:** To sort the results by the **Username**, **Full Name** or **Email Address** columns, click the column header name.<br>3. From the **Username** column, click the link for the user you wish to update.<br>*The User Details screen displays the user overview including contact details, user role and user entitlements.* |
|  <br>**User Details Screen** | 4. Click the **Update User** link that displays on the right-side of the screen.<br>*The Update User screen displays the Personal Details, Contact Details, User Role(s) and Hierarchy, and Entitlements.* |

**Screen**




**Update Users**

**Step/Action**

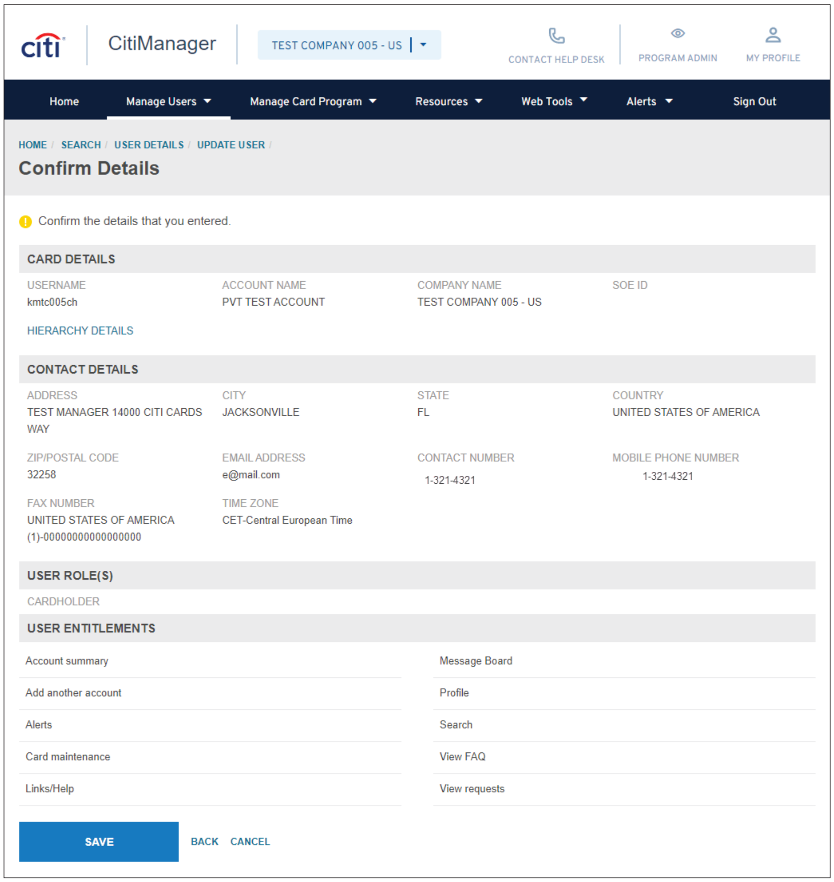
5. To change personal details:
   a. From the **Personal Details** section header, click the **(+) plus sign** icon to expand the section.
   b. Maintain the username and first and last name as necessary.
6. To change contact details:
   a. From the **Contact Details** section header, click the **(+) plus sign** icon to expand the section.
   b. Maintain the address, phone numbers and e-mail address as necessary.
7. To change the user's role or hierarchy:
   a. From the **User Role(s) and Hierarchy** section header, click the **(+) plus sign** icon to expand the section.
   b. Click the **Change Role** link to unlock the role checkboxes and then select/deselect the checkboxes to change the user's role.
   c. Click the **Set Hierarchy** link to update the user's hierarchy.

      *The Set Hierarchy Screen displays.*
   d. Click the **(+) plus sign** icon to expand the hierarchy tree. Click the checkboxes for the hierarchies you wish to assign to the user. When you are finished, click the **Select** button.

      *The Update User screen displays.*
8. To change the user's entitlements:
   a. From the **Entitlements** section header, click the **(+) plus sign** icon to expand the section.
   b. Select or deselect the entitlements you would like to assign or unassign the user.
9. When you are finished making all changes, click the **Continue** button that displays at the bottom of the screen.

   *The Confirm Details screen displays.*

| Screen | Step/Action |
|---|---|
| See the screenshot and caption below. | 10. Verify your changes and click the **Save** button. *A confirmation message displays at the top of the screen.*<br>11. Click the **OK** button.<br>*The Search for Users screen displays.* |




Confirm Details

# Perform Account Maintenance

## Key Concepts

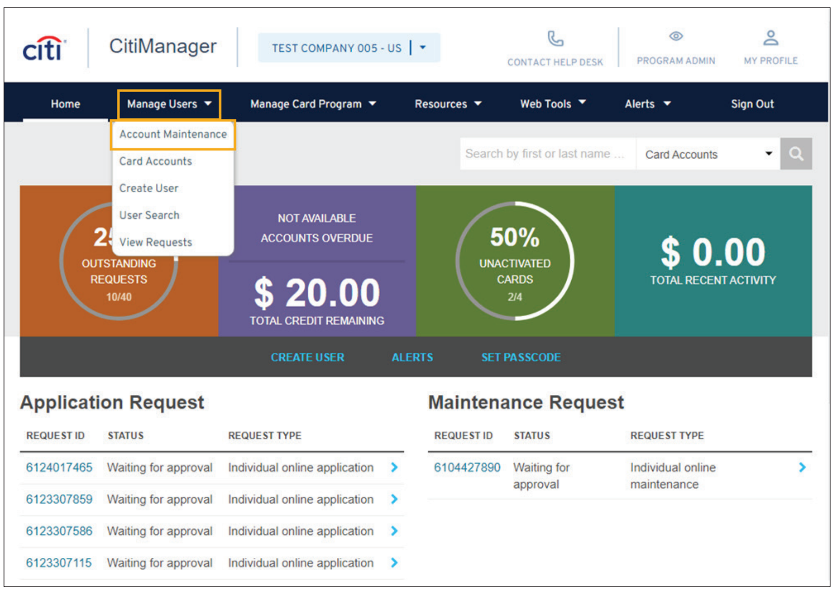
To perform account maintenance, the Cardholder Maintenance form must be completed and submitted to Citi. Account Maintenance allows the Agency Program Coordinator (APC) to update Cardholder account information such as card address, discretionary codes and temporary spending controls.

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

You can close an account by selecting the appropriate account status from the **Cardholder — Additional** section.

## Step-by-Step Instructions

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>




**CitiManager Site Home Screen**

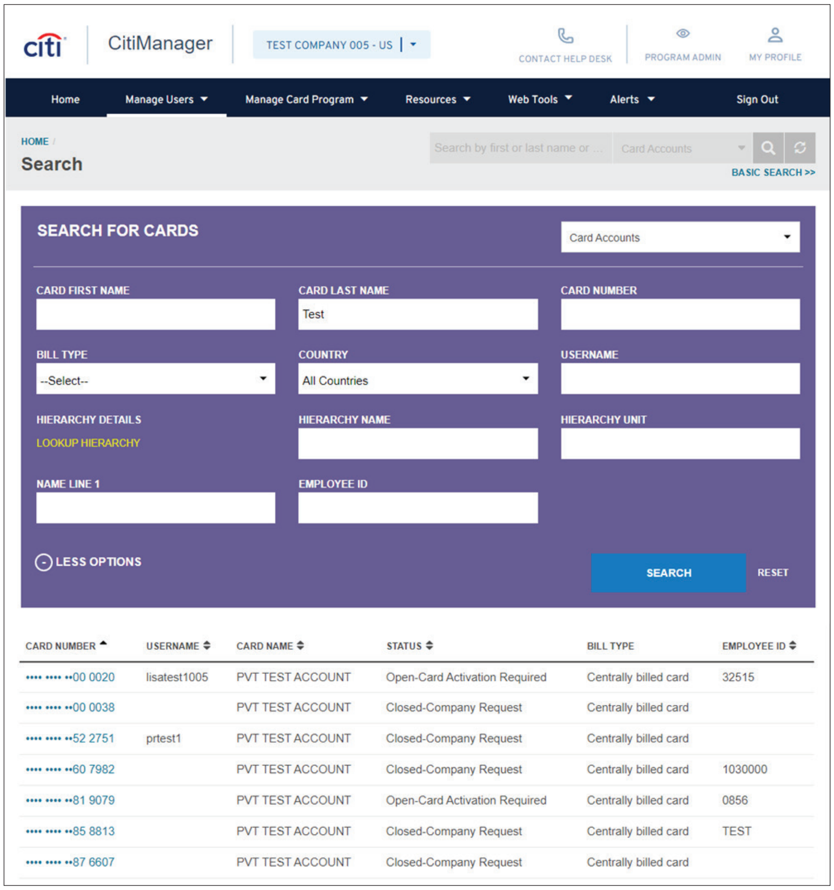
</td><td>

1. From the navigation bar, position your mouse over the **Manage Users** drop-down menu and click the **Card Accounts** link.

   *The Search for Cards — Search screen displays.*

</td></tr>
</table>

| Screen | Step/Action |
|---|---|
| | |




**Card Account — Search for Cards Screen**

2. To narrow your search, type the desired search criteria in **Card First Name**, **Card Last Name** or **Card Number** fields and click the **Search** button.

   **Note:** To perform an advanced search using the **Bill Type**, **Country**, **Username**, **Hierarchy Name**, **Hierarchy Unit**, **Name Line 1**, or **Employee ID** fields, click the **More Options** button.

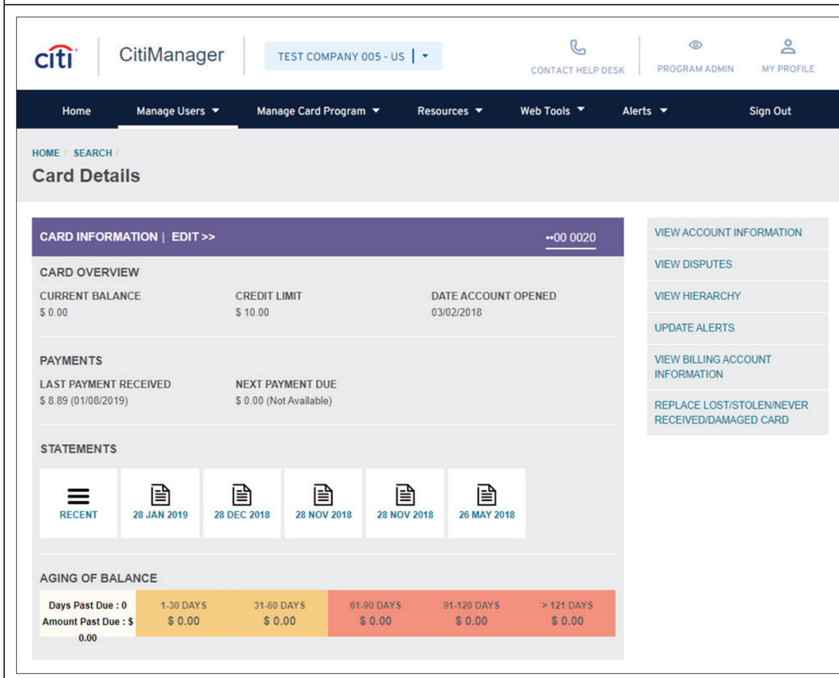
   If you search by **Hierarchy Unit**, you must enter the full hierarchy number with no spaces or dashes.

   To search for users at a specific hierarchy level, click the **Lookup Hierarchy** link. If necessary, click the **(+) plus sign** icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the **Select** button.

   *The search results display at the bottom of the screen.*

3. From the **Card Number** column, click the link for the card account you wish to view.

   *The Card Details screen displays.*

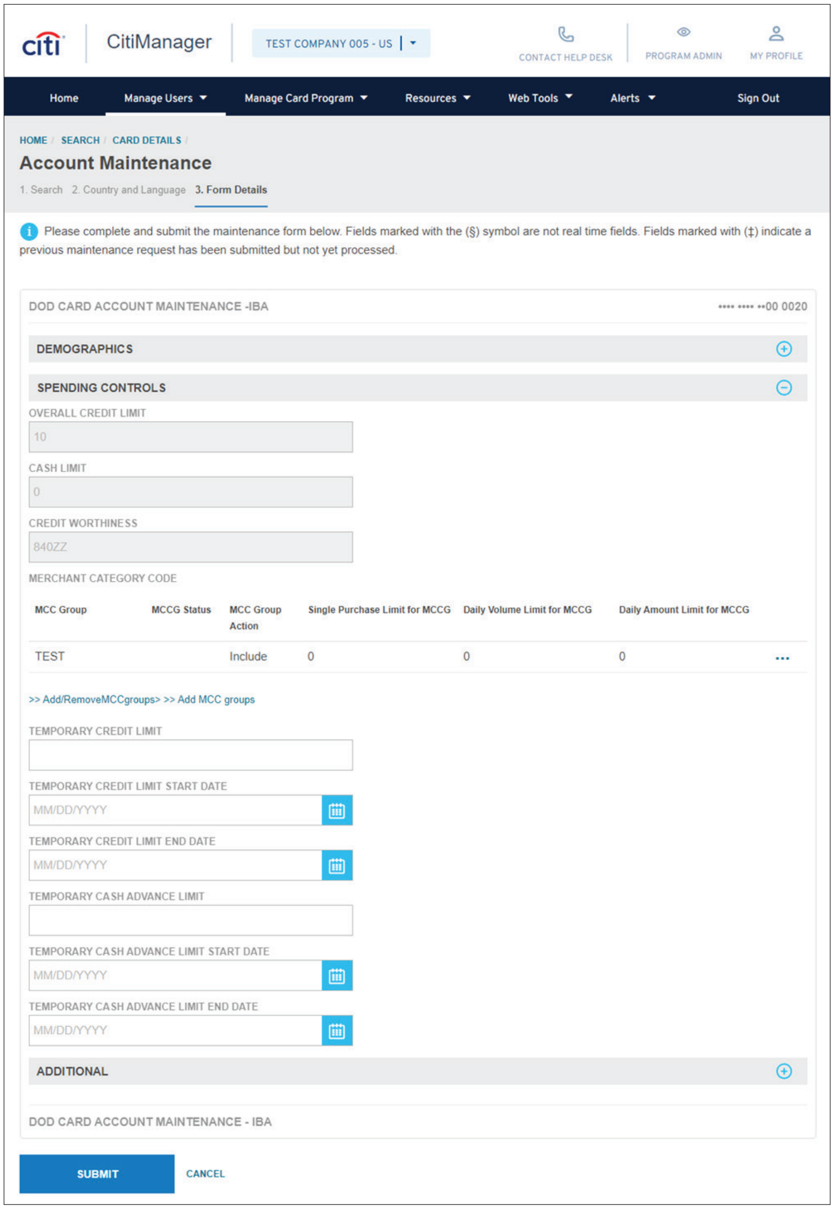



**Card Details — Edit**

4. From the **Card Information** section header, click the **Edit** link.

   *The Form Details screen displays.*

## Screen




**Account Maintenance — Form Details Screen**

## Step/Action

5. Complete the necessary updates to all sections of the form.

**Note:** You can maintain information such as the address, temporary credit limit, account status and MCCGs.

Fields marked with the (§) symbol are not real-time fields. Fields marked with the (‡) indicate a previous maintenance request has been submitted but not yet processed. All un-marked fields are processed in real-time.

If the Cardholder has agreed to go paperfree for their statements, the checkbox below the paperfree agreement will be selected. The **Temporary Cash Advance Limit Start Date** and **Temporary Credit Limit Start Date** fields are real-time until 5:30 P.M. EST. After 5:30 P.M. EST, you must enter a date that is greater than today's date.

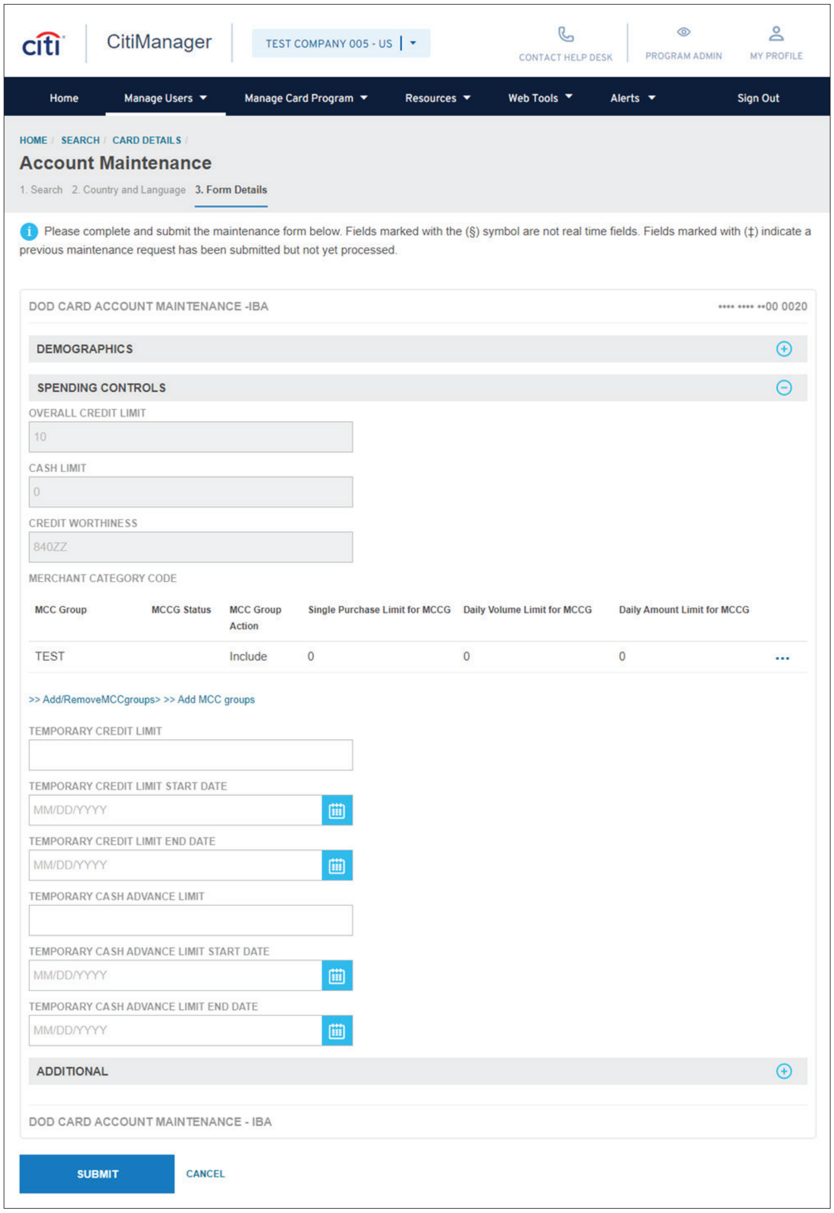
To add/remove an MCCG, click the **Add/RemoveMCCGroups** link. Select or deselect the checkbox(es) for the desired MCCGs. If you are adding and deleting MCCGs to an account, you must perform the additions prior to submitting the deletions. When you are finished, click the **Update** button and then the **Back to Form** button.

To close an account, from the **Additional** section, from the **Account Status** drop-down list, select the desired status.

There are several closed status options: Closed, Closed Deceased, Closed Not Used/Inactivity, Closed Misuse, Closed Temporary Block, Closed No Longer Employed, Closed Too Many Cards/Duplicate. The only closed status that cannot be reopened in the CitiManager Site is Closed Deceased. Closed Temporary Block is equivalent to Deactivate.

*(continued on pg. 10)*

## Screen




**Account Maintenance — Form Details Screen**

## Step/Action

*(continued from pg. 9)*

To put the account in mission critical status, enter the dates for mission critical status in the **Mission Critical Start Date** and **Mission Critical End Date** fields. The mission critical start date has to be greater than today's date and only occur on business days.

If you need to add comments to explain the reasons for account changes, enter them in the **Account Comments** field on the maintenance form. You can enter a maximum of 500 characters in the field. You can view previous comments by clicking the **View History** button. This information is also fed to CitiManager — Reporting and is included in reporting.

To order a replacement card, you may select the checkbox in the **Order a Replacement Card** section. Select the address to which you want the replacement card to be delivered.

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.

6. When you are finished updating the form, click the **Submit** button.

   *A confirmation message displays based on the maintenance performed.*

7. Click the **OK** button.

   *A confirmation screen displays at the top of the screen.*

   **Note:** To order a replacement card, select the checkmark in the **Order a Replacement Card** section. Select the address to which you want the replacement card to be delivered.

# Permanent Change of Station Status (PCS) Maintenance

## Key Concepts

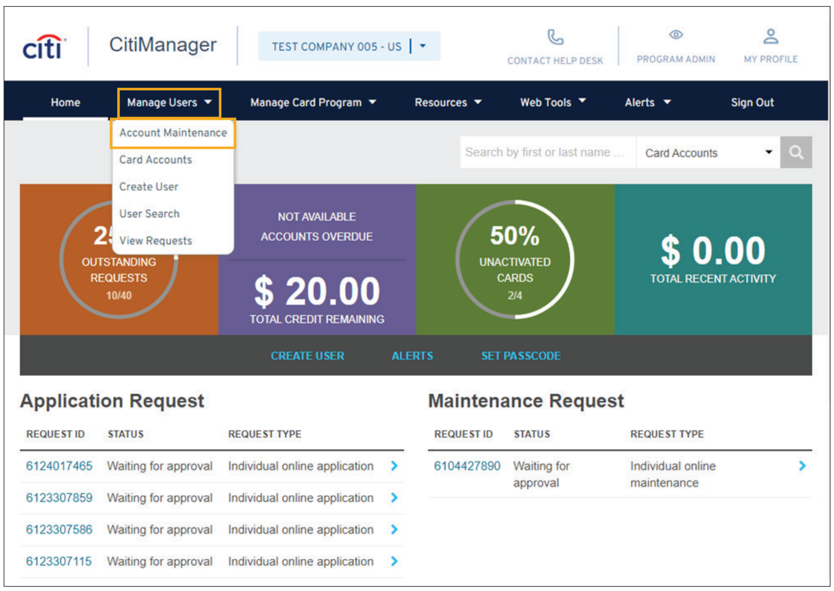
A Permanent Change of Station (PCS) status is used to keep the account balance from aging while a Cardholder is moving to a new permanent duty location and extends the payment window for Cardholders.

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

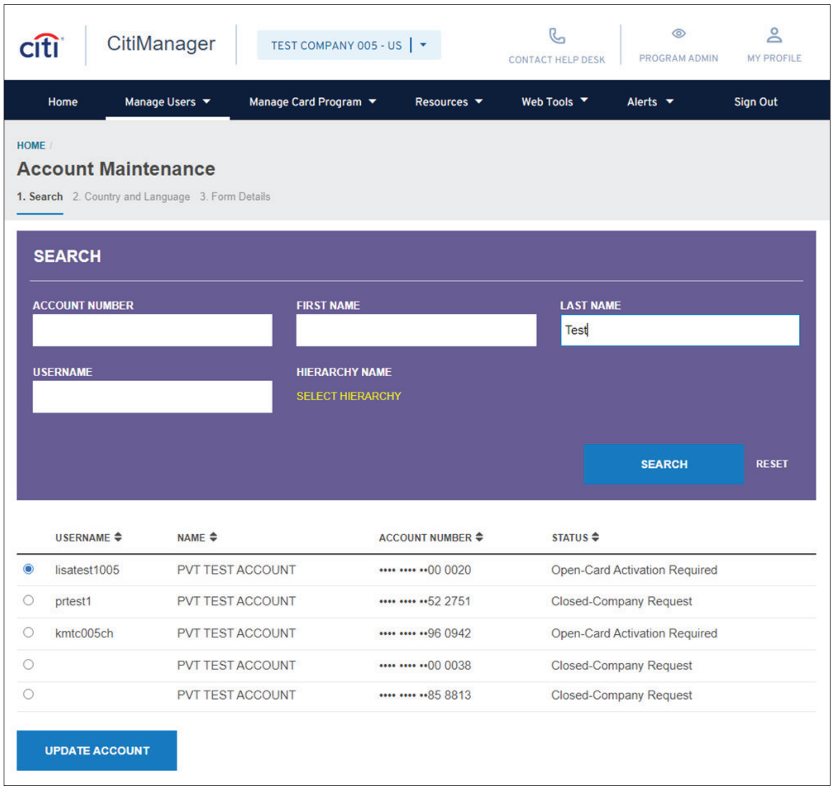
To place a Cardholder in PCS status, an APC must place the account into mission critical status and ensure the **PCS Status** indicator is set to **Y**.

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

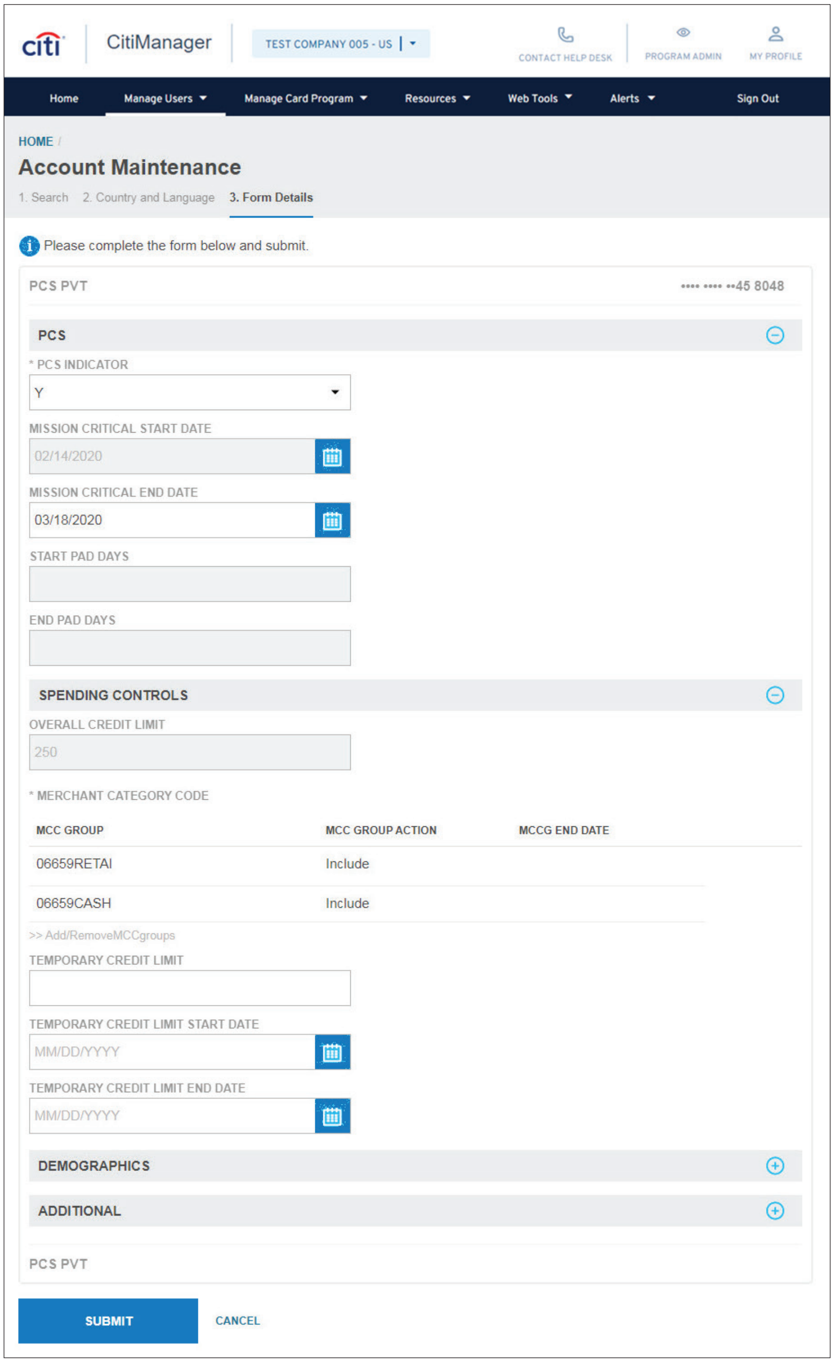
## Step-by-Step Instructions

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>

<br>Home Screen</td>
<td>1. From the navigation bar, position your mouse over the Manage Users drop-down menu and click the Account Maintenance link.<br><br>The Account Maintenance Search screen displays.</td></tr>
</table>

| Screen | Step/Action |
|---|---|
|  Search Screen | 2. To perform a search, type the desired search criteria in the **Account Number**, **First Name**, **Last Name** or **Username** fields and click the **Search** button.<br><br>**Note:** To search for an account at a specific hierarchy level, click the **Select Hierarchy** link. If necessary, click the **(+) plus sign** icon to expand the hierarchy. Select the checkbox for the desired hierarchy and click the **Select** button.<br><br>*The search results display at the bottom of the screen.*<br><br>3. Select the radio button for the account you wish to place in PCS status and click the **Update Account PCS** link that displays at the bottom of the screen.<br><br>*The Account Maintenance Form Details screen displays.* |

**Screen**



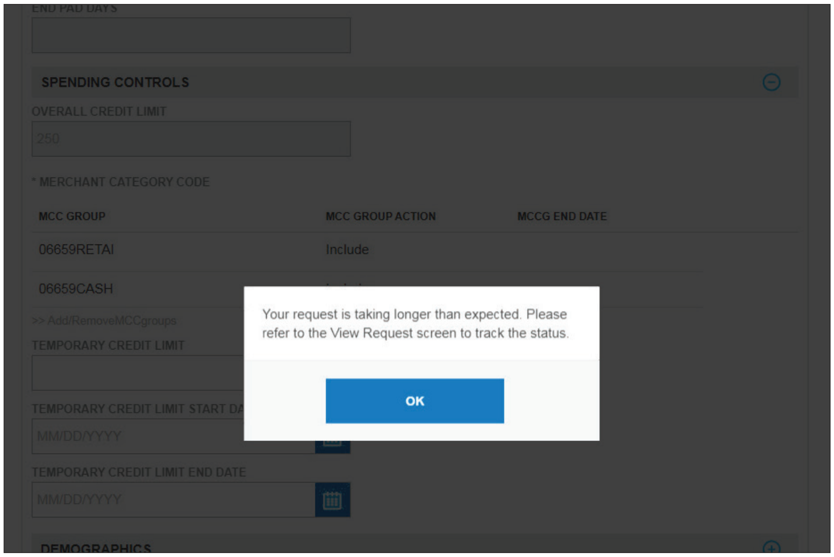

**Form Details Screen**

**Step/Action**

4. Verify the **PCS Indicator** is set to **Y** and update if necessary.
5. From the **PCS PVT** section, complete the **Mission Critical Start Date** and **Mission Critical End Date** fields of the form.

   **Note:** The mission critical start date has to be greater than today's date and only occur on business days. The elapsed time between start and end date cannot exceed more than 120 calendar days.
6. Depending on the PCS, you may need to complete additional fields/sections such as:
   - **Start Pad Days** and **End Pad Days**. PAD days are the number of days you want to give a traveler as an extension to check in to their next duty station.
   - MCC Groups
   - **Temporary Credit Limit**, **Temporary Credit Limit Start Date and Temporary Credit Limit End Date, Temporary Cash Limit, Temporary Cash Limit Start Date, and Temporary Cash Limit End Date.**
7. When you are finished, click the **Submit** button.

   *A confirmation message displays indicating the form has successfully processed.*

| Screen | Step/Action |
|---|---|
|  <br>**Confirmation Message** | 8. Click the **OK** button.<br>*You are returned to the Account Maintenance screen.* |

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