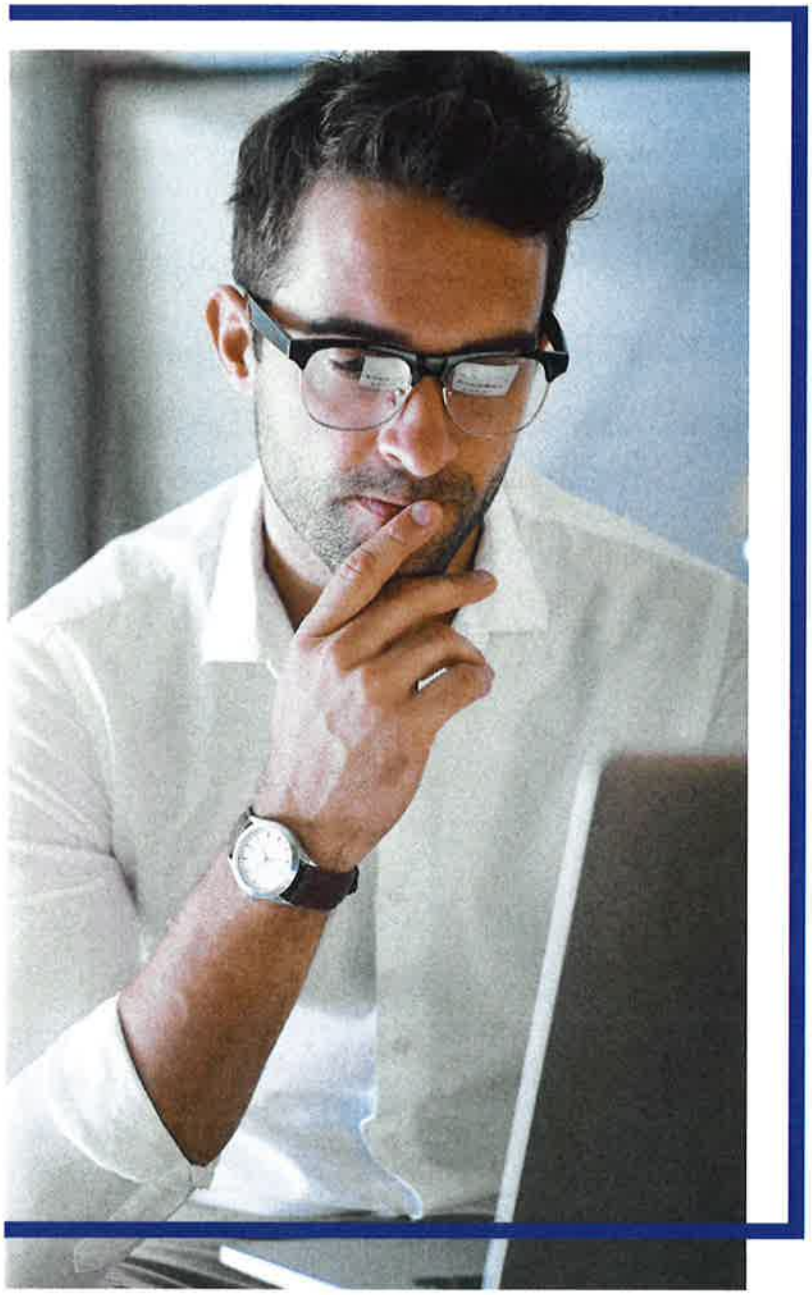


Access® Online

Mobile app

User guide
Version 1-3
All users

Contents

Mobile app

You can use the Access Online mobile app to view account and card information, manage transactions (including disputing and attaching receipts), make payments, request a virtual account, and set up alerts.

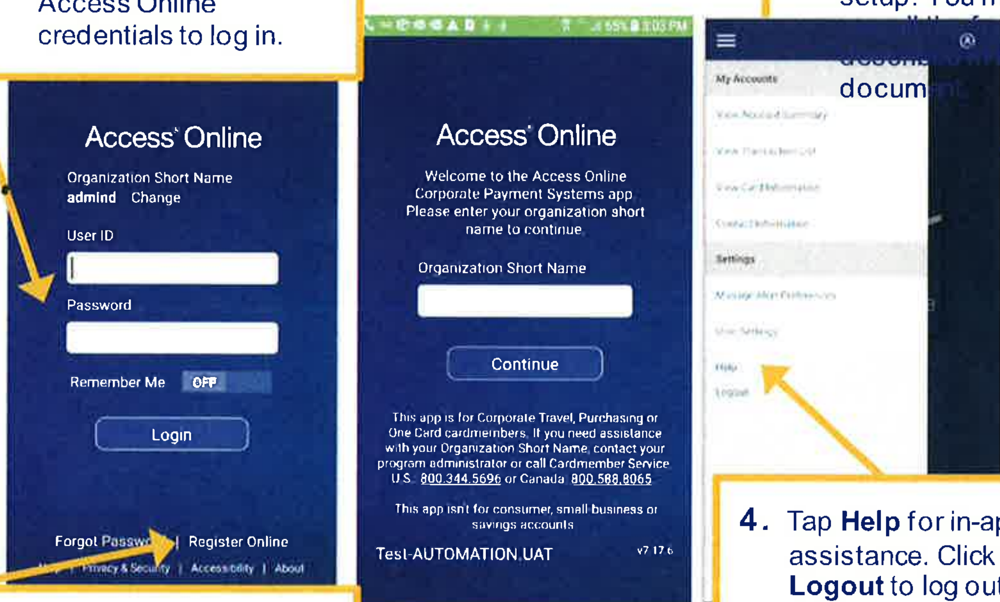
You can use both the Access Online web site and the mobile app. The tasks you complete in the mobile app synch immediately with Access Online.

The app does not store any sensitive account information on your mobile device, and the app uses the highest level of secure encryption to protect all your transmissions.

Download and start using the app

1. Download the app to your supported Apple or Android mobile device and use your existing Access Online credentials to log in.

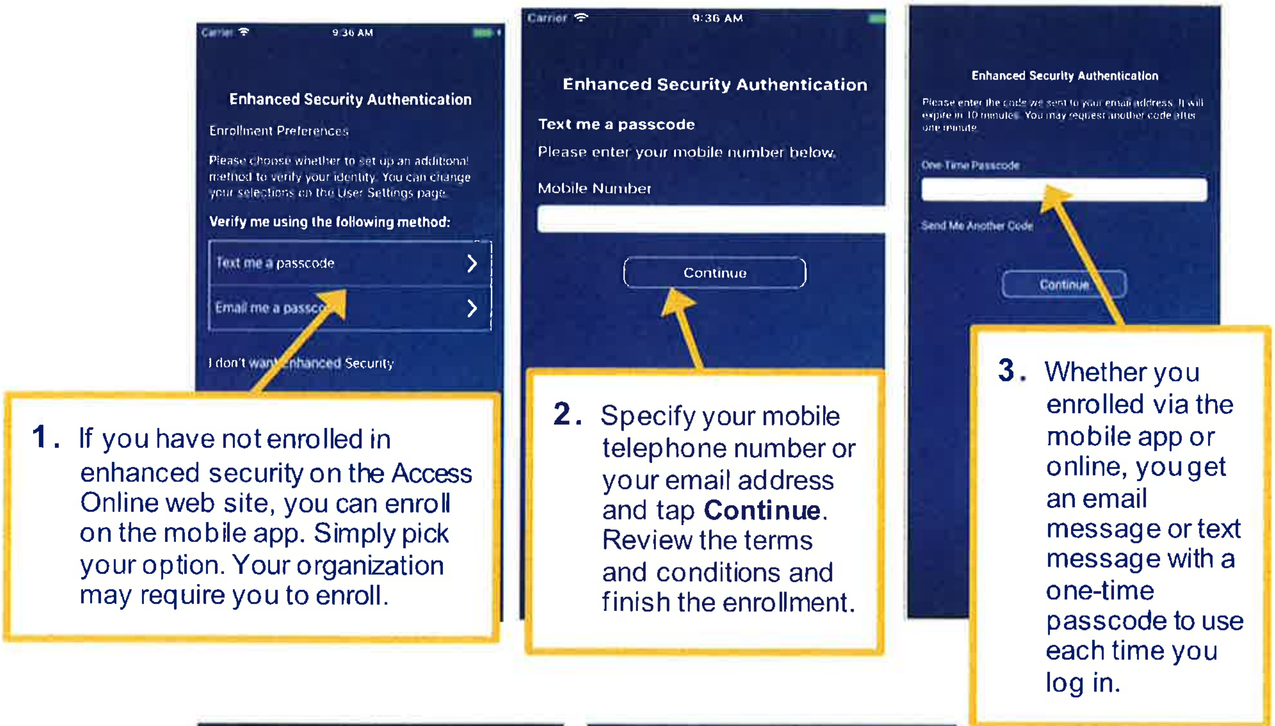
3. The options you see in your app depend on your organization's setup. You may not ... nctions ... his docum



4. Tap **Help** for in-app assistance. Click **Logout** to log out of the app.

2. Or, to register, have your organization short name (OSN), account number, and account expiration date available and tap **Register Online**.

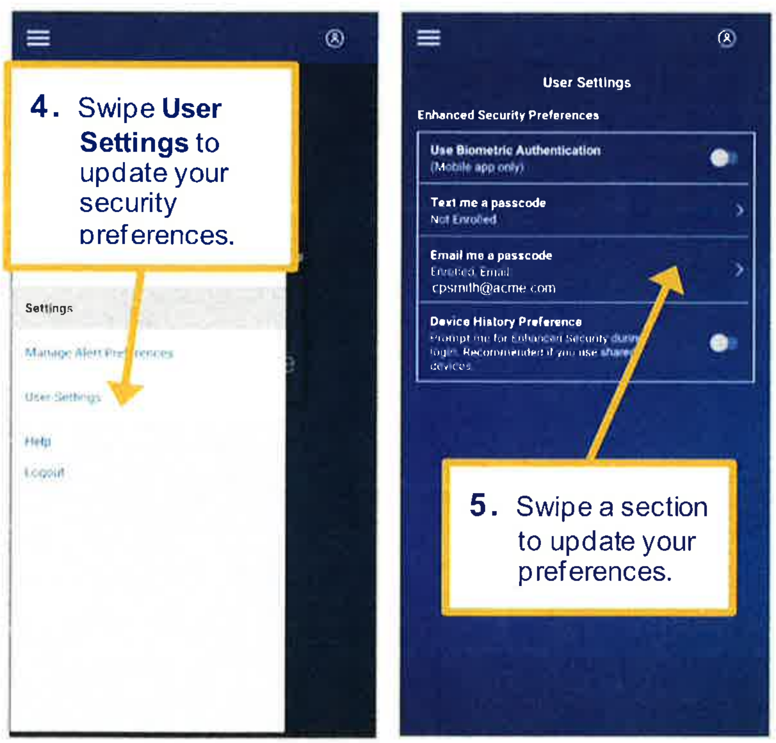
Use enhanced security



1. If you have not enrolled in enhanced security on the Access Online web site, you can enroll on the mobile app. Simply pick your option. Your organization may require you to enroll.

2. Specify your mobile telephone number or your email address and tap **Continue**. Review the terms and conditions and finish the enrollment.

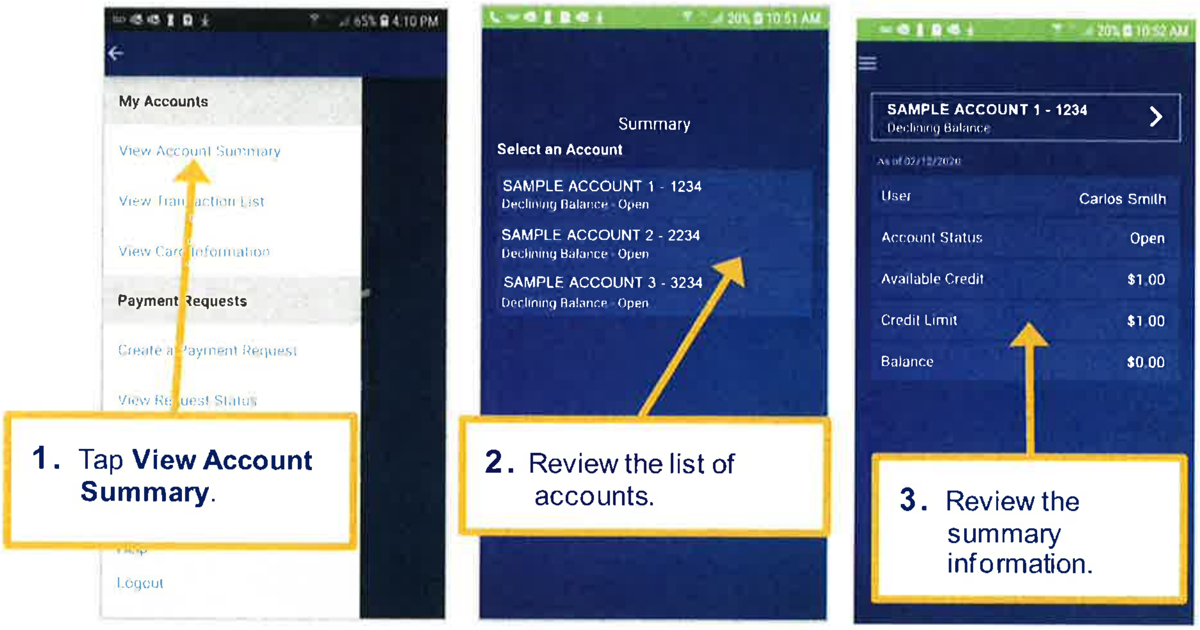
3. Whether you enrolled via the mobile app or online, you get an email message or text message with a one-time passcode to use each time you log in.



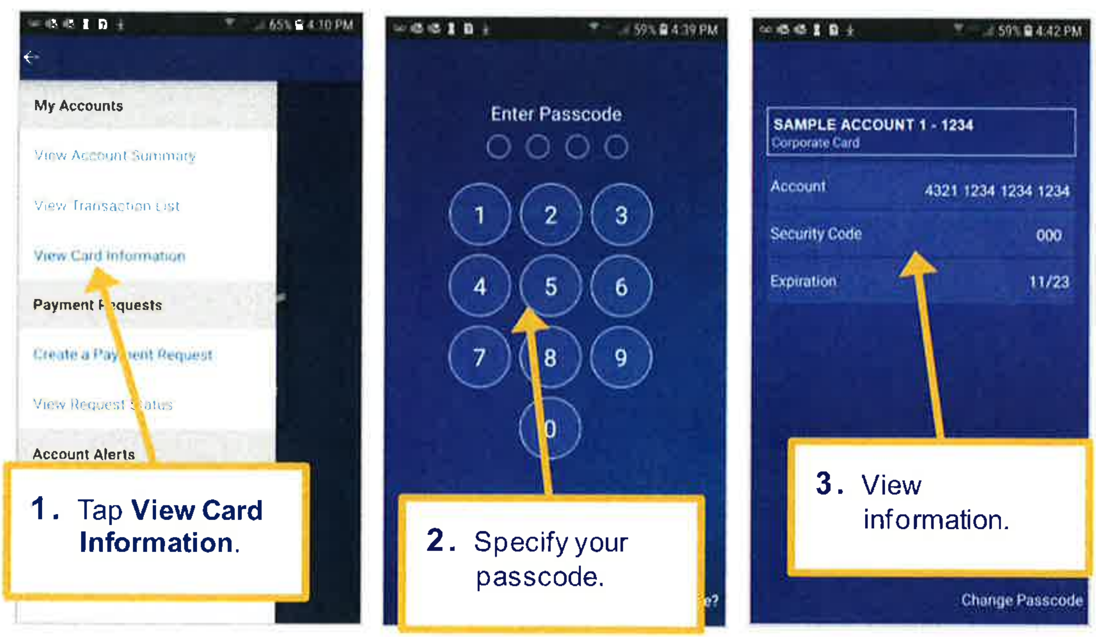
4. Swipe **User Settings** to update your security preferences.

5. Swipe a section to update your preferences.

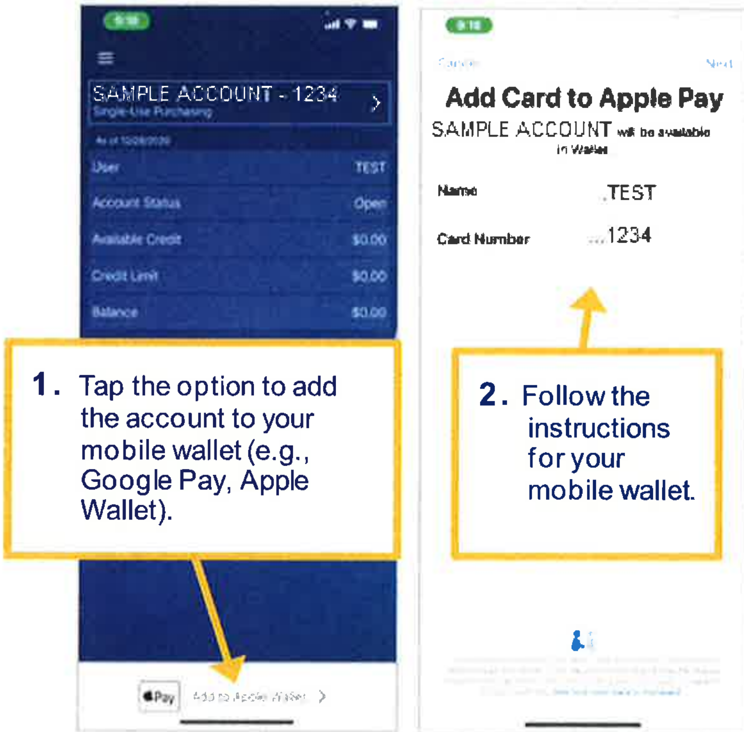
View account summary



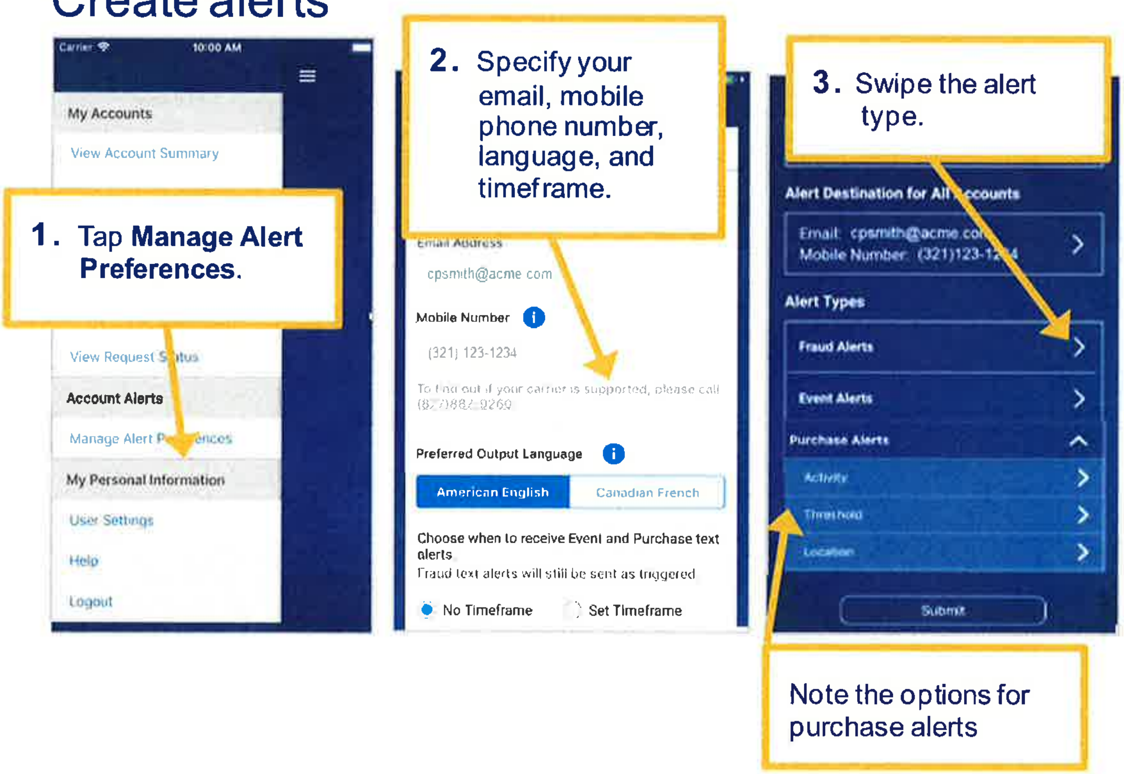
View card information

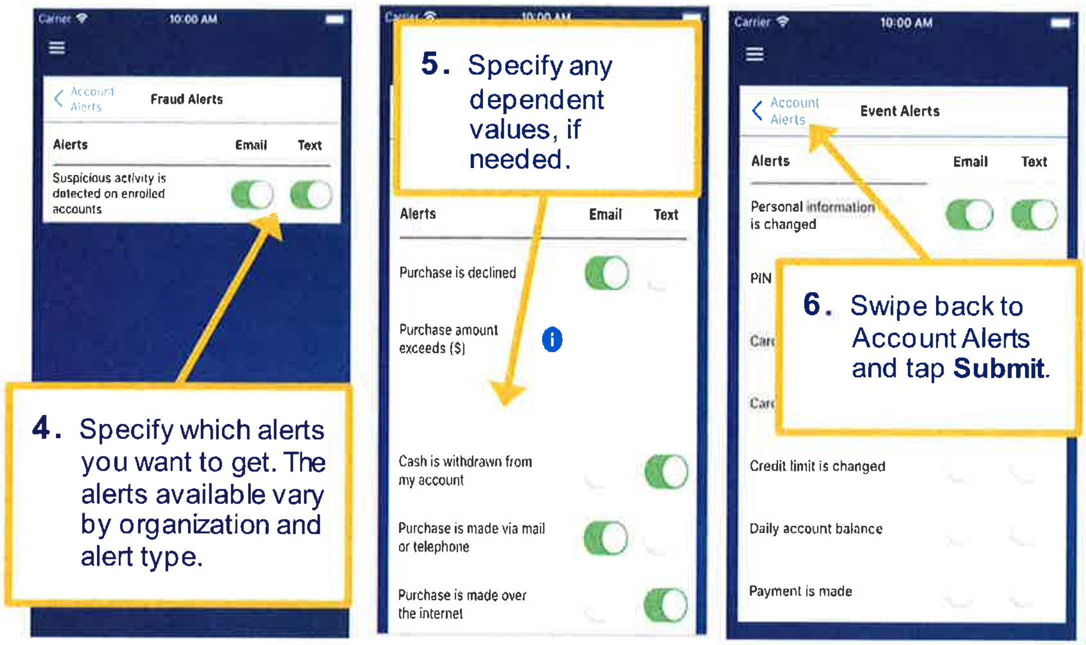


Add an account to your mobile wallet



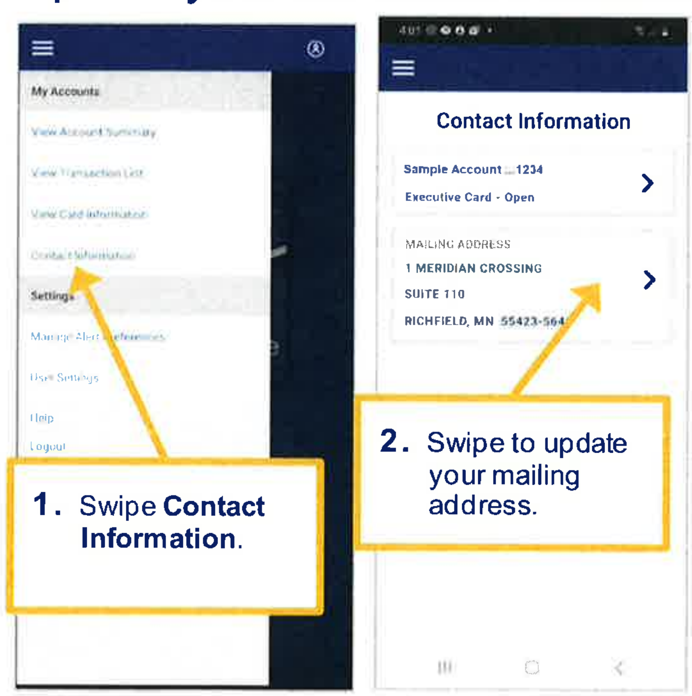
Create alerts

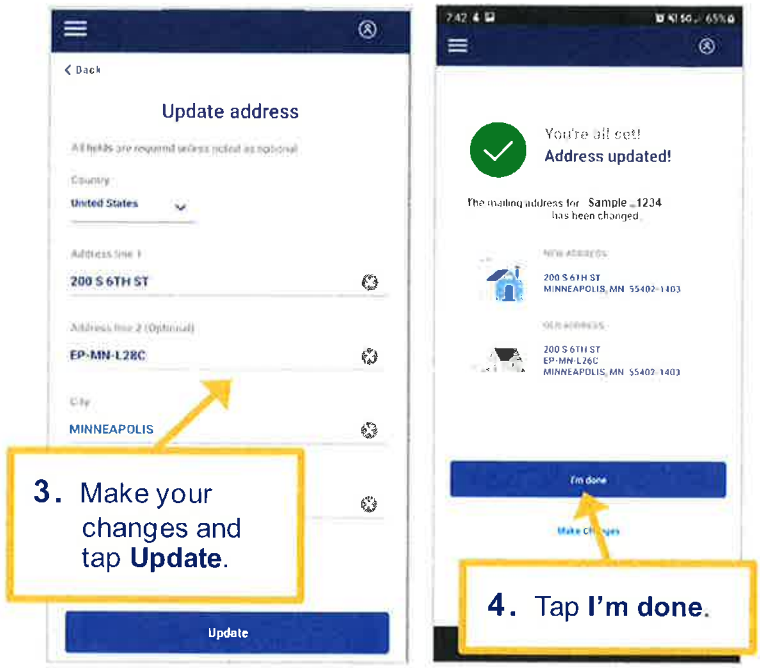




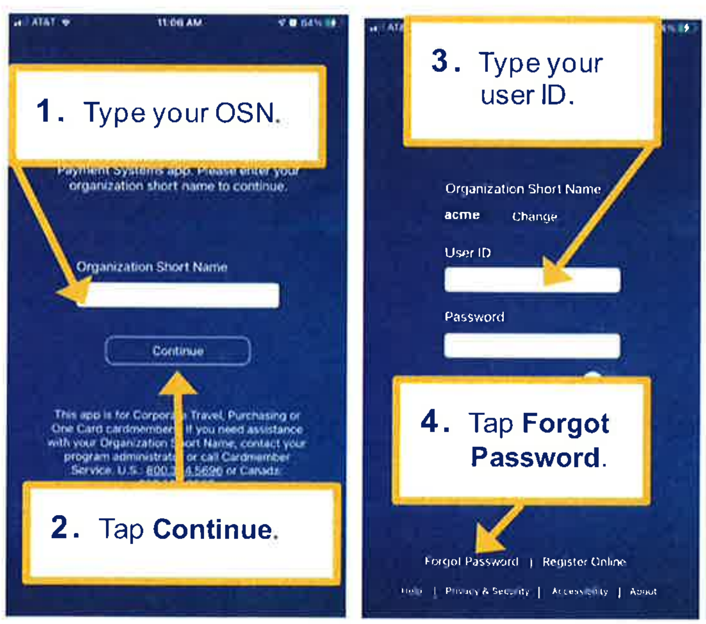
Learn More: For more information on alerts, refer to the *Access Online: Alerts and notifications* user guide.

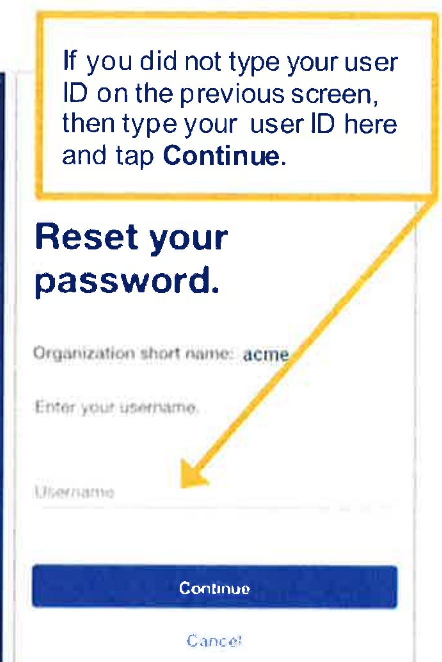
Update your contact information



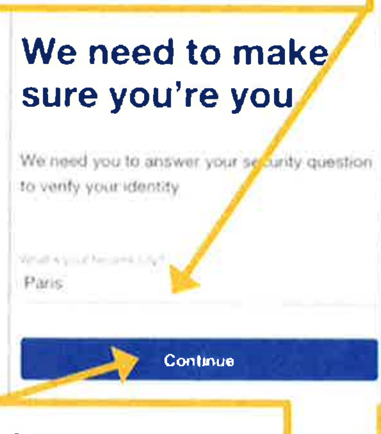


Reset your password



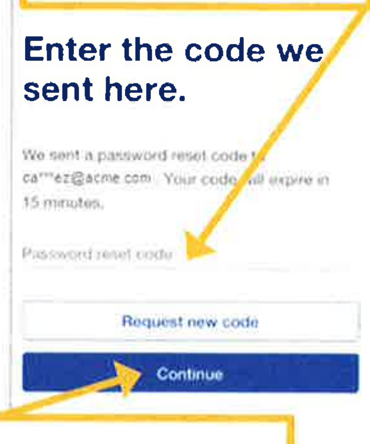


5. Type the answer to your security question.



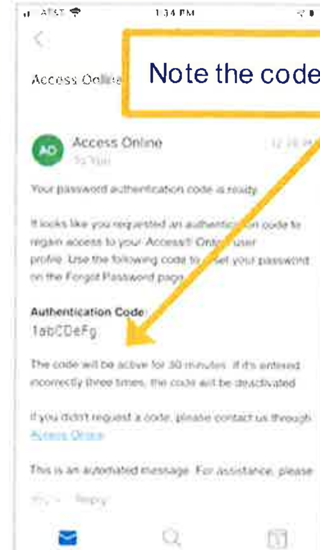
6. Tap **Continue**.

7. Wait for an email with a password reset code and then enter the code.

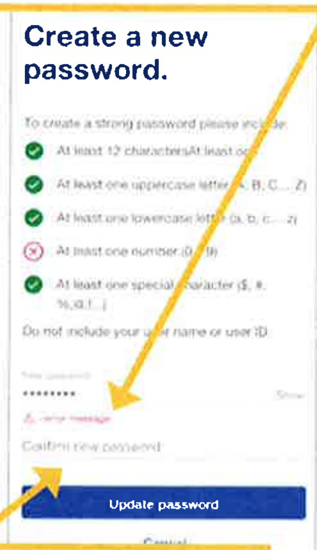


8. Tap **Continue**.

Note the code.

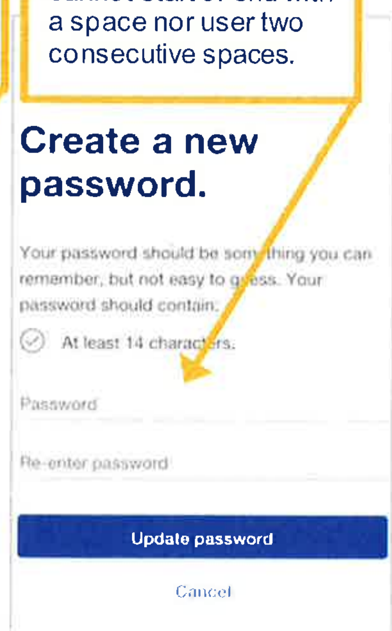


9. Type a new password or password phrase two times. The requirements update as you type.

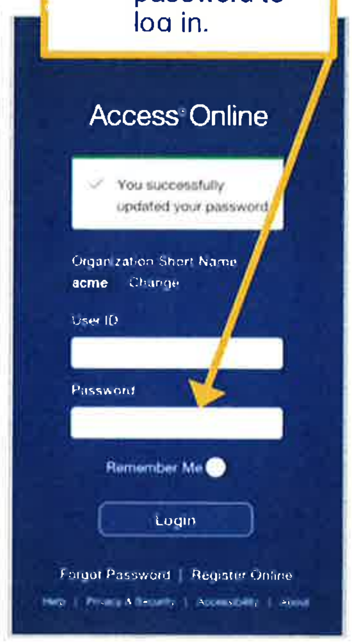


10. Tap **Update password**.

Password phrases are less restrictive, but you cannot start or end with a space nor user two consecutive spaces.



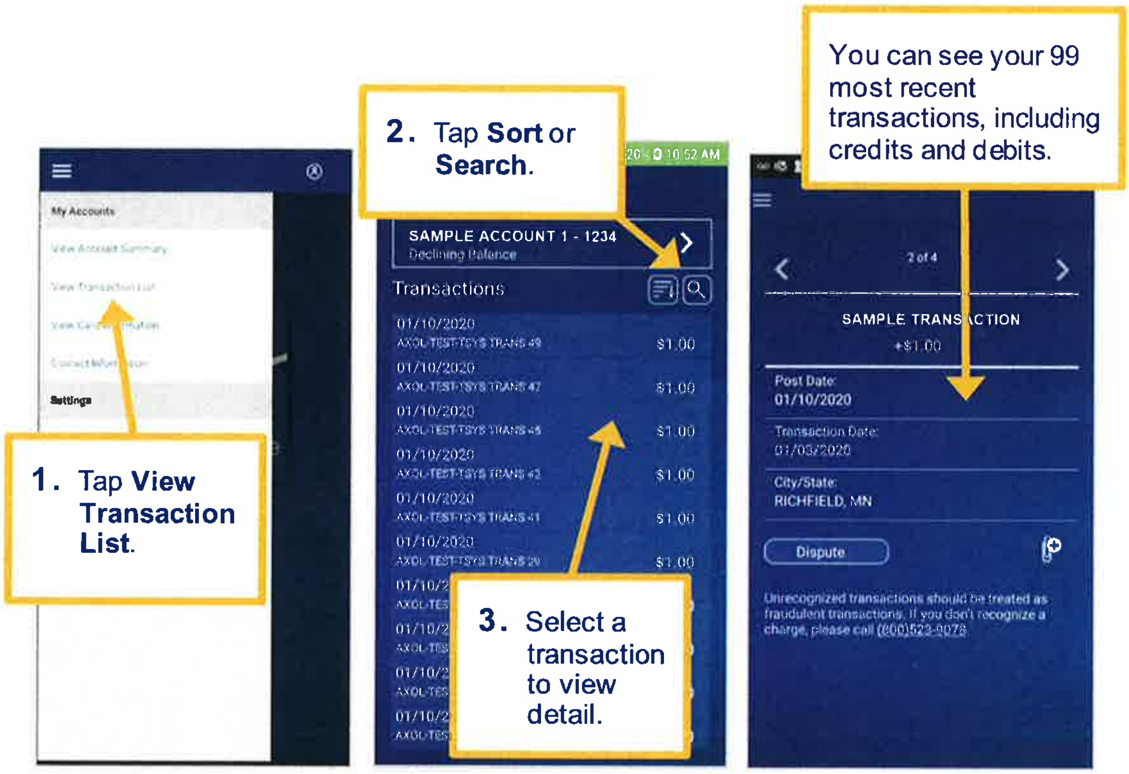
11. Use your user ID and new password to log in.



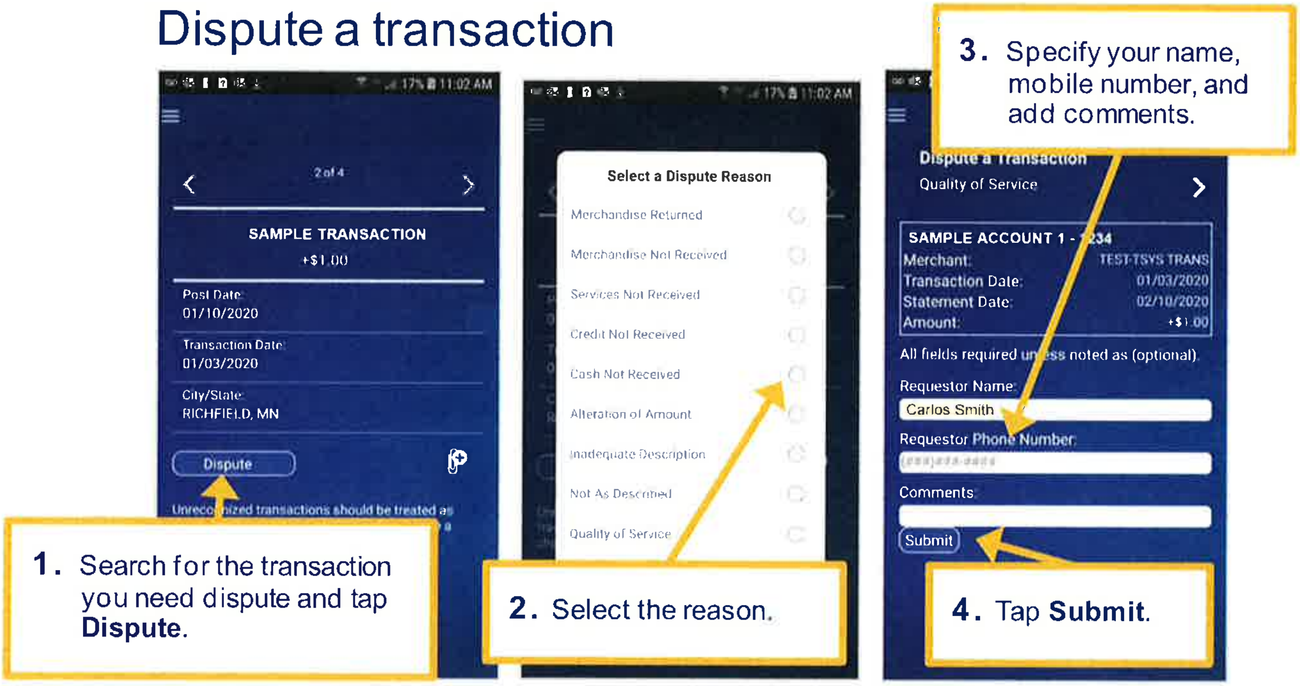
Transaction management

You can view transactions, dispute transactions, attach a receipt to a transaction, and create a payment request.

View transactions

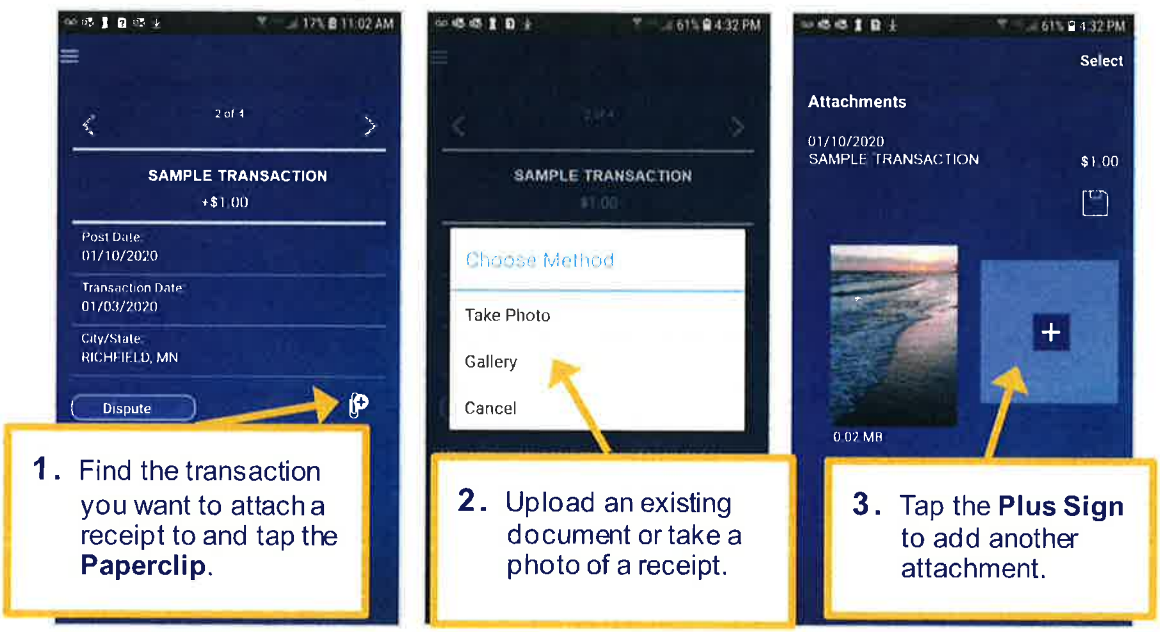


Dispute a transaction



Tip! After you submit the dispute, you can cancel the dispute if you need to. You can also track the dispute status.

Attach a receipt to a transaction

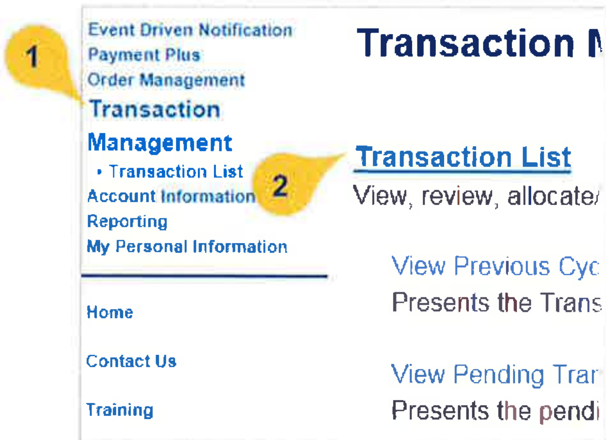


Tip! You can upload a JPG, PNG, or PDF. You can upload unlimited receipts, but the maximum file limit is 5 MB for all files. Access Online converts all uploads to a single PDF for a transaction. After you upload an attachment, a *Paperclip* icon displays for the transaction. Click the **Paperclip** icon to view the attachment.

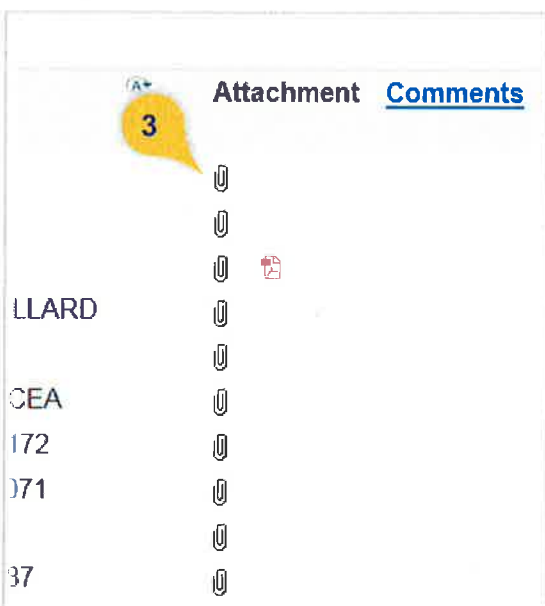
Attachments

You can use this quick reference guide as a fast reminder of the basic steps for attaching a file (PNG, JPG, or PDF) to a transaction and viewing attached files.

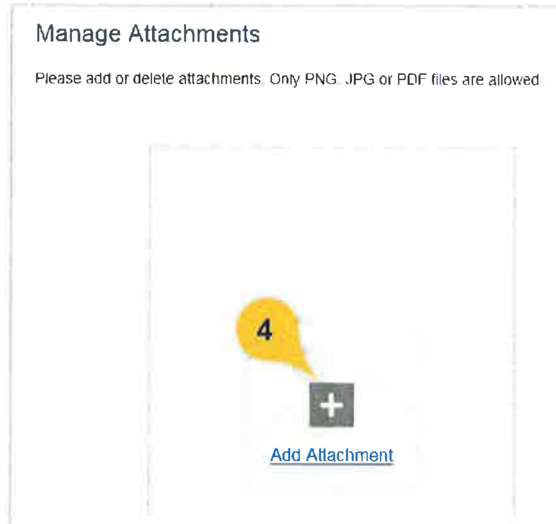
Attach a file



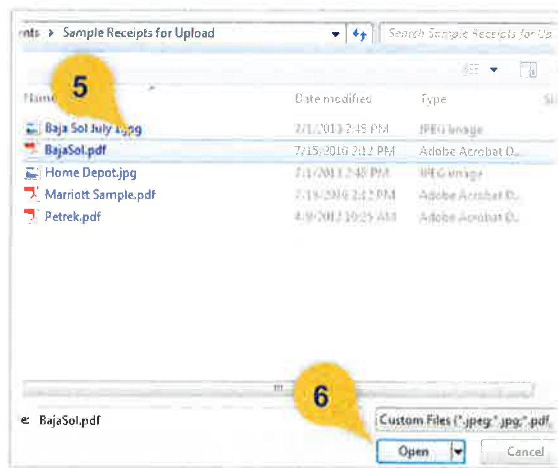
1. Select the **Transaction Management** high-level task.
2. Click the **Transaction List** link.



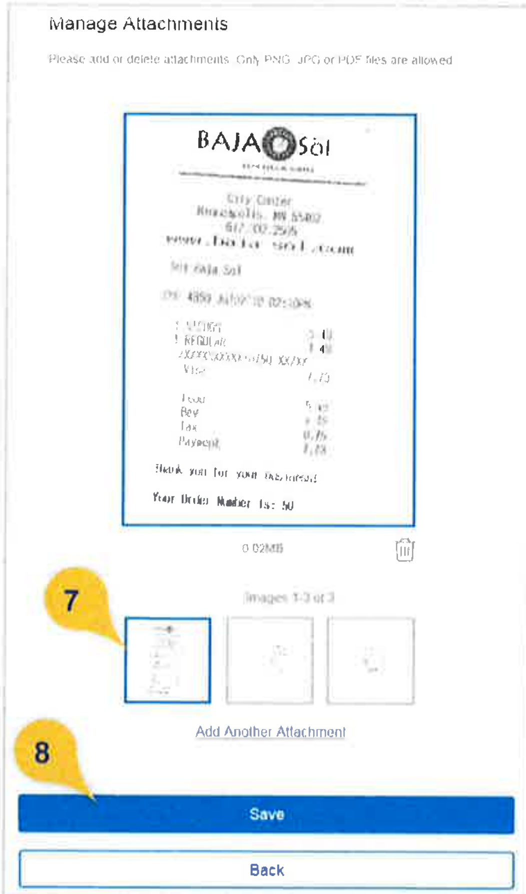
3. On the list of transactions, click the **Paperclip** icon.



4. Click the **Add Attachment** link.



5. Search and select one or more files to attach.
6. Click the **Open** button.



7. Page through multiple receipts, if needed.
8. Click the **Save** button.

Learn more: For more detailed information, refer to the *Transaction management* web-based training lesson and user guide.

View an attachment

You can view an attachment by:

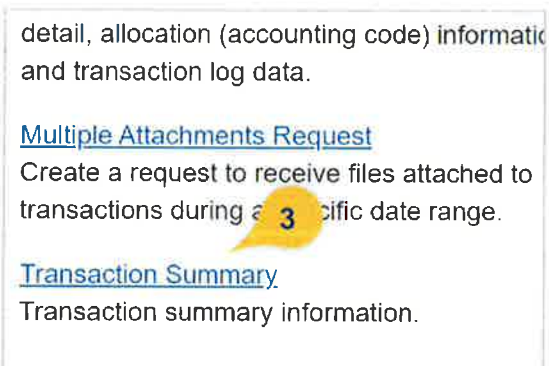
- Clicking the PDF icon on the transaction list
- Running a *Transaction Summary* report
- Completing a multiple attachments request if you are Program Administrator

Transaction list

1. Navigate to the transaction list.
2. Click the PDF icon to open and view the attached file.

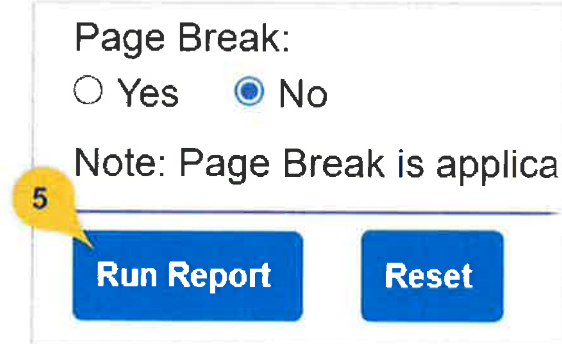
Transaction Summary report

1. Select **Reporting**.
2. Select **Financial Management**.



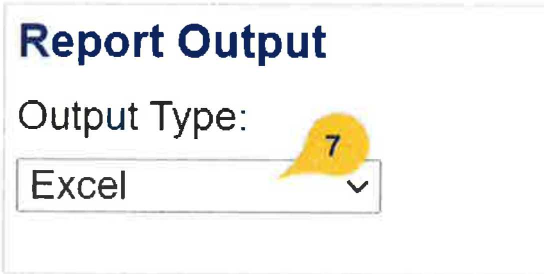
3. Click **Transaction Summary**.

4. Select **PDF** if you want to view the attachment.

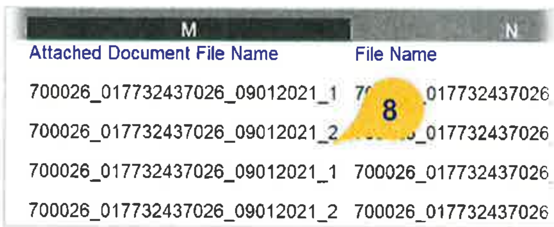


5. Click **Run Report**.

6. Click **View Image**.

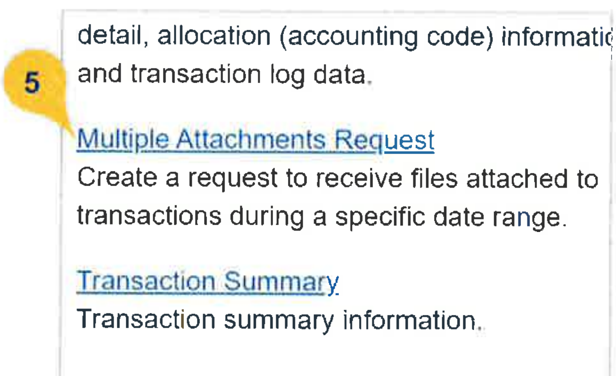


7. Select **Excel** if you just want to check for receipt attachment.

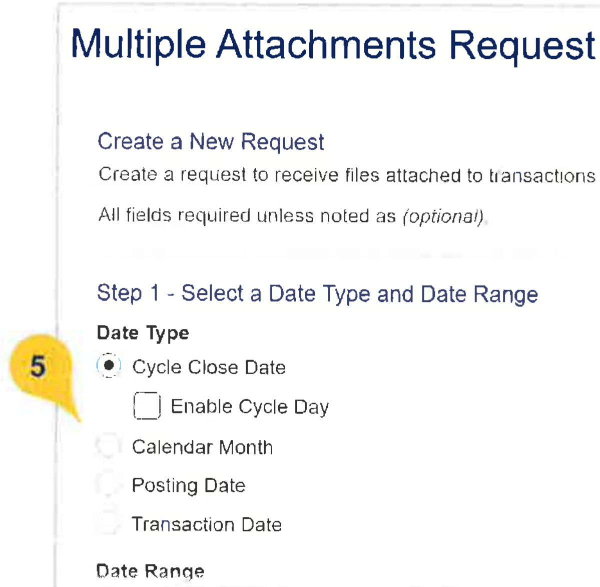


8. Note the attachment file name in the report.

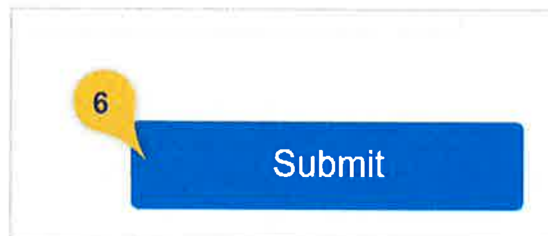
Multiple attachments request



1. If you are a Program Administrator, then you can also request a file of multiple attachments.
2. Select **Reporting**.
3. Select **Financial Management**.
4. Click **Multiple Attachments Request**.



5. Complete the form.



6. Click **Submit**.

Learn more: For more detailed information, refer to the *Access Online: Multiple attachments request* quick start guide.

CAT ID: NA

Survey

Please take a few minutes to respond to a short survey on our training.