

New User Configuration

Quick Reference Guide

New User Configuration

Admin > Create User > User Information

INTRUST Bank. Message Center Notifications 64 Cut-Off Times Last Login: 05/28/2021, 10:20 AM, CST Hi, Jennifera

DASHBOARD ACCOUNTS PAYMENTS REPORTING ADMIN

< Back to User List

Create New User

User Information **User Information** Copy User

2 Name: *

Login ID: *

Department:

Email: *

Phone: * - - Ext:

Fax: - -

Super User: INACTIVE

3 Admin: INACTIVE

Save Changes Reset

1 Select **Create User** from the Admin drop-down menu.

2 Complete the User Information fields.

Name: First and Last name of the user

Login ID: ID that is used to access Business Online Banking.

Department: Optional field

Email: User's email address

Phone: User's contact number. The extension is optional

Fax: Optional field

3 Select Additional User Type

Admin: ability to add, edit, delete, and approve company users in Business Online Banking

Super User: has full access to all accounts and services on the Business Online Banking profile, including immediate access to new accounts/services added to the profile in the future

Tip: 4 Use the **Copy User** feature on this screen to copy the entitlements from another user to create this new user.

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment.

New User Configuration

Account Access

The screenshot shows the INTRUST Bank Account Access configuration page for Jane User. The page includes a navigation bar with the INTRUST Bank logo, Message Center, Notifications (64), Cut-Off Times, Last Login (05/28/2021, 10:20 AM, CST), and user profile (Hi, Jennifer). The main navigation menu includes DASHBOARD, ACCOUNTS, PAYMENTS, REPORTING, and ADMIN. The user information section shows Jane User with a status of Inactive and a Submit for Enrollment button. A note indicates that changes have been made to the user that have not been submitted for enrollment. The Account Access section features a search filter and a table of accounts with checkboxes for access. A note at the bottom states that the save button applies to the current tab only. The left sidebar contains various configuration options like User Information, Account Access, IP Access, Time Access, ACH, Entitlements, User Limits, POSITIVE PAY, and REPORTING.

Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. [Discard All Edits](#)

Account Number	CIF Number	Account Name	Account Type	User Has Access
xxxx5570	xxxx	Checking	Checking	<input type="checkbox"/>
xxxx0395	xxxx	Checking	Checking	<input type="checkbox"/>
xxxx8477	xxxx	Savings	Savings	<input type="checkbox"/>
xxxx4088	xxxx	Checking	Checking	<input type="checkbox"/>

Note: The save button below applies to the current tab only. Once all tabs have been completed and saved, click the submit button at the top of the page.

[Save Changes](#) [Reset](#)

1 Select the accounts available to the user using the select all checkbox, or individual accounts.

If Super User was selected on the previous screen, all accounts and features will be automatically enabled, and account selections are unnecessary.

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment.

New User Configuration

IP Access

The screenshot shows the INTRUST Bank user configuration page for Jane User. The user's status is Inactive. The IP Access section is currently set to UNRESTRICTED, indicated by a toggle switch and a '1' in a blue circle. A note at the top states: "Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. Discard All Edits". The available IP addresses section is empty. A warning message at the bottom of the section reads: "The save button below applies to the current tab only. Once all tabs have been completed and saved, click the submit button at the top of the page." Buttons for "Save Changes" and "Reset" are visible.

1 Determine whether the user will be able to access Business Online Banking from any IP Address (Unrestricted) or toggle to Restricted and add IP Addresses.

2 After entering an IP Address and Name, click the plus sign to add additional IP Addresses, or click Save Changes.

This inset screenshot shows the IP Access section with the toggle set to RESTRICTED, indicated by a blue toggle switch and a '2' in a blue circle. The available IP addresses section now contains one entry: a public IP address field and a name field containing "Office". A plus sign icon and a trash icon are visible next to the entry. A warning message at the bottom of the section reads: "The save button below applies to the current tab only. Once all tabs have been completed and saved, click the submit button at the top of the page." Buttons for "Save Changes" and "Reset" are visible.

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

Time Access

The screenshot shows the INTRUST Bank user configuration interface for Jane User. The user's status is Inactive. The Time Access section is currently set to UNRESTRICTED, indicated by a toggle switch and a circled '1'. The table below shows access type for each day of the week, all set to 'Allowed all day'. A note at the top of the section states: "Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. Discard All Edits".

Day	Access Type	Begin	End
Monday	Allowed all day		
Tuesday	Allowed all day		
Wednesday	Allowed all day		
Thursday	Allowed all day		
Friday	Allowed all day		
Saturday	Allowed all day		
Sunday	Allowed all day		

1 Determine whether the user will be able to access Business Online Banking at any time of the day on all days (Unrestricted) or toggle to Restricted and select days and times for access.

2 Determine whether each day is allowed all day, by time range, or restricted.

The screenshot shows the INTRUST Bank user configuration interface for Jane User. The user's status is Inactive. The Time Access section is currently set to RESTRICTED, indicated by a toggle switch and a circled '2'. The table below shows access type for each day of the week. Monday is set to 'Allowed time range' with a time range of 08:00 AM to 05:00 PM. Tuesday, Saturday, and Sunday are set to 'Restricted all day'. Wednesday, Thursday, and Friday are set to 'Allowed all day'. A note at the top of the section states: "Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. Discard All Edits".

Day	Access Type	Begin	End
Monday	Allowed time range	08 : 00 AM	05 : 00 PM
Tuesday	Restricted all day		
Wednesday	Allowed all day		
Thursday	Allowed all day		
Friday	Allowed all day		
Saturday	Restricted all day		
Sunday	Restricted all day		

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

ACH Entitlements

INTRUST Bank | Message Center | Notifications (64) | Cut-Off Times | Last Login: 05/28/2021, 10:20 AM, CST | Hi, Jennifera

DASHBOARD | ACCOUNTS | PAYMENTS | REPORTING | ADMIN

User Information | Account Access | IP Access | Time Access | ACH | **Entitlements** | User Limits | POSITIVE PAY | REPORTING | TRANSFER/LOAN PAYMENT | WIRE

ACH Entitlements

ACH Company Access: 4 [Manage ACH Companies](#)

Restricted Batch 2

ACH Templates

	Create ACH Template	Full Edit ACH Template	Partial Edit ACH Template	Delete ACH Template	Approve ACH Template
1 Toggle row 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ACH Payments

	Create ACH Payment	Full Edit ACH Payment	Delete ACH Payment	Approve ACH Payment	Partial Edit ACH Payment	File Upload Edit
Toggle row	<input type="checkbox"/>					

International ACH Payments

	Create International ACH Payment	Full Edit International ACH Payment	Partial Edit International ACH Payment	Delete International ACH Payment	Approve International ACH Payment	File Upload Edit International ACH Payment
Toggle row	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Recipients

	Create Recipient	Edit Recipient	Delete Recipient	Approve Recipient
Toggle row	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Review

	ACH Notification of Change	ACH Returns
Toggle row	<input type="checkbox"/>	<input type="checkbox"/>

1 Select ACH entitlements for:

- Templates
- Payments
- International ACH
- Recipients
- Review

2 If Restricted Batch is selected, the user can restrict batch payments and approvals from the view of others.

3 Select Toggle Row to one-click enable all entitlements for that row

4 If ACH entitlements are enabled, Click Manage ACH Companies (details on following page)

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

Manage ACH Company Access

The screenshot shows the 'Manage ACH Company Access' modal window. At the top left of the modal is a search bar labeled 'Search Available ACH Companies' with a magnifying glass icon. Below the search bar is a table with the following columns: Company Name, Company ID, SEC Code, Entry Description, and Discretionary Data. The table contains several rows of data. A red circle '1' is placed over the top row's checkbox, and a red circle '2' is placed over the search bar. At the bottom left of the modal are 'Save' and 'Cancel' buttons. The background shows the user's profile 'Jane User' and various navigation options.

<input type="checkbox"/>	Company Name	Company ID	SEC Code	Entry Description	Discretionary Data
<input type="checkbox"/>			CCD		
<input type="checkbox"/>			PPD		
<input type="checkbox"/>			PPD		
<input type="checkbox"/>			CCD		
<input type="checkbox"/>			CCD		
<input type="checkbox"/>			IAT		IAT - INTERNATIONAL
<input type="checkbox"/>			CCD		
<input type="checkbox"/>			PPD		

1 Use the top-row checkbox to enable all companies or select individually.

2 Use the Search Available ACH Companies field to quickly locate a company. The list of companies will filter as the user enters the company name.

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

ACH User Limits

Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. [Discard All Edits](#)

ACH User Limits

Product Daily Limit:

Daily Initiation Limit: 1

Approval Limit: 2

ACH Company Name	ACH Company ID	ACH Company Limit	Transaction Limit	Daily Limit
		\$50.00	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
		\$500.00	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
		\$9,999,999,999.99 ⓘ	<input type="text" value="\$50.00"/> 3	<input type="text" value="\$50.00"/> 4

Set the following limits:

1 Daily Initiation Limit – Amount this user is allowed to initiate across ACH Companies in a single day.

Note: the daily initiation limit cannot be more than the total of the daily limit set for all accounts.

2 Approval Limit – Dollar amount per ACH batch/file this user is allowed to approve.

3 Transaction Limit – The amount this user is allowed to initiate at the transaction level for the given account.

4 Daily Limit – The amount this user can initiate for the day for the given account.

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

Positive Pay Entitlements

Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. [Discard All Edits](#)

User Information | **Positive Pay Entitlements**

Account Access | **1** Check Exceptions | ACH Exceptions | **2**

IP Access

Time Access

ACH ^

Entitlements

User Limits

POSITIVE PAY ^

Entitlements

Type to filter

	Account Name	Upload/Create ARP Files	Download ARP Files	Work ARP Exceptions
Toggle all		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Toggle row	xxxx5570	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Note: The save button below applies to the current tab only. Once all tabs have been completed and saved, click the submit button at the top of the page.

[Save Changes](#) [Reset](#)

Select Accounts and entitlements for:

1 Positive Pay Check Exceptions

2 Positive Pay ACH Exceptions

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

Reporting Entitlements (if applicable)

Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. [Discard All Edits](#)

Account Name	CDR Balance	PDR Balance	Date Range Balance	CDR Transaction	PDR Transaction	Date Range Transaction	EDI Report
Toggle all	<input type="checkbox"/>						
Toggle row xxx5570	<input checked="" type="checkbox"/>						
Toggle row xxx0395	<input type="checkbox"/>						
Toggle row xxx8477	<input checked="" type="checkbox"/>						

Viewing 1 - 3 of 3

Note: The save button below applies to the current tab only. Once all tabs have been completed and saved, click the submit button at the top of the page.

[Save Changes](#) [Reset](#)

Select which reports will be available for each account.

1 Use the Toggle row feature to enable all reports for the selected account at one time

2 Use the top-row check box to enable an individual report for all accounts

CDR = Current Day Report
PDR = Prior Day Report

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

Transfer/Loan Payment Entitlements

Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. [Discard All Edits](#)

Account Name	Create Internal Transfer/Loan Payment	Edit Internal Transfer/Loan Payment	Delete Internal Transfer/Loan Payment	Approve Internal Transfer/Loan Payment	Create Internal Transfer Template	Edit Internal Transfer Template	Delete Internal Transfer Template	Approve Internal Transfer Template
Toggle all	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toggle row xxxx5570	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toggle row xxxx0395	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toggle row xxxx8477	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toggle row xxxx4088	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Note: The save button below applies to the current tab only. Once all tabs have been completed and saved, click the submit button at the top of the page.

[Save Changes](#) [Reset](#)

Select which Transfer and Loan entitlements will be available for each account.

1 Use the Toggle row feature to enable all entitlements for the selected account at one time

2 Use the top-row check box to enable all accounts for an individual entitlement

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

Transfer/Loan Payment User Limits

The screenshot shows the INTRUST Bank user configuration interface. At the top, there is a navigation bar with the INTRUST Bank logo, a Message Center, Notifications (64), Cut-Off Times, Last Login: 05/28/2021, 10:20 AM, CST, and a user profile for Jennifer. Below the navigation bar is a menu with DASHBOARD, ACCOUNTS, PAYMENTS, REPORTING, and ADMIN. A warning message at the top states: "Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. Discard All Edits". The main content area is titled "Transfer/Loan Payment User Limits" and contains three input fields: "Product Daily Limit" set to \$10,000.00, "Daily Initiation Limit" set to \$5,000.00 (marked with a red circle '1'), and "Approval Limit" set to \$10,000.00 (marked with a red circle '2'). Below these fields is another warning message: "The save button below applies to the current tab only. Once all tabs have been completed and saved, click the submit button at the top of the page." At the bottom of the form are "Save Changes" and "Reset" buttons. A sidebar on the left contains links for User Information, Account Access, IP Access, Time Access, ACH, Entitlements, and User Limits.

Set the following limits:

1 Daily Initiation Limit – Amount this user is allowed to initiate for internal transfers

2 Approval Limit – Dollar amount this user is allowed to approve.

Note: INTRUST does not enforce separate approvals for internal transfers, but an approval amount is required to complete internal transfers independently.

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

Wire Entitlements

INTRUST Bank. Message Center Notifications 64 Cut-Off Times Last Login: 05/28/2021, 10:20 AM, CST Hi, Jennifera

DASHBOARD ACCOUNTS PAYMENTS REPORTING ADMIN

Jane User Status: Inactive [Submit for Enrollment](#)
Edited by Jennifer A 05/28/2021 at 12:11PM

Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. [Discard All Edits](#)

Domestic Wire Entitlements

	Create Beneficiary	Edit Beneficiary	Approve Beneficiary	Delete Beneficiary	Upload Domestic Wire File	Manage Wire File Format
Toggle row	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Account Entitlements

Type to filter

	Account Name	Create Domestic Wire Payment	Edit Domestic Wire Payment	Delete Domestic Wire Payment	Approve Domestic Wire Payment	Create Wire Template	Edit Wire Template	Approve Wire Template	Delete Wire Template
Toggle all		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toggle row	xxxx0395	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The save button below applies to the current tab only. Once all tabs have been completed and saved, click the submit button at the top of the page.

[Save Changes](#) [Reset](#)

Select which Domestic Wires Entitlements will be available for beneficiaries and accounts.

1 Use the Toggle row feature to enable all entitlements for the selected account at one time

2 Use the top-row check box to enable all accounts for an individual entitlement

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

Wire User Limits

The screenshot shows the INTRUST Bank user configuration interface. At the top, there is a navigation bar with the INTRUST Bank logo, a Message Center, Notifications (64), Cut-Off Times, Last Login (05/28/2021, 10:20 AM, CST), and user profile (Hi, Jennifer). Below the navigation bar are tabs for DASHBOARD, ACCOUNTS, PAYMENTS, REPORTING, and ADMIN. The main content area is for 'Jane User' (Status: Inactive) and includes a 'Submit for Enrollment' button. A note indicates that changes have been made but not submitted for enrollment. The 'Wire User Limits' section is highlighted with an orange border and contains the following fields:

- Product Daily Limit: \$200,000,000.00
- Total Daily Limit: \$50,000.00 (marked with a '1' in an orange circle)
- Approval Limit: \$125,000.00 (marked with a '2' in an orange circle)

Below these fields is a 'Filter Account Limits' search box and a table of account limits:

Account Number	Company Account Transaction Limit	Transaction Limit	Company Account Daily Limit	Daily Limit
xxxx0395	\$200,000,000.00	\$50,000.00 (marked with a '3' in an orange circle)	\$200,000,000.00	\$50,000.00 (marked with a '4' in an orange circle)

At the bottom of the configuration area, there is a note: 'The save button below applies to the current tab only. Once all tabs have been completed and saved, click the submit button at the top of the page.' Below this note are 'Save Changes' and 'Reset' buttons.

Set the following Wire User Limits:

1 Total Daily Limit – Amount this user is allowed to initiate across wire accounts in a single day. Note: the total daily limit cannot be more than the total of the daily limit set for all accounts.

2 Approval Limit – Dollar amount per wire this user is allowed to approve.

Account Limits

3 Transaction Limit – Limit this user can initiate for each transaction.

4 Daily Limit – Limit this user can initiate for this account.

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

FX Wire Entitlements

INTRUST Bank. Message Center Notifications 64 Cut-Off Times Last Login: 05/28/2021, 10:20 AM, CST Hi, Jennifera

DASHBOARD ACCOUNTS PAYMENTS REPORTING ADMIN

[Back to User List](#)

Jane User Status: Inactive [Submit for Enrollment](#)

Edited by Jennifer A 05/28/2021 at 12:11PM

Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. [Discard All Edits](#)

FX Wire Entitlements

	Create FX Beneficiary	Edit FX Beneficiary	Approve Beneficiary	Delete Beneficiary
Toggle row	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Account Entitlements

Type to filter

	Account Name	Create FX Wire Payment	Approve FX Wire Payment
Toggle all		<input type="checkbox"/>	<input type="checkbox"/>
Toggle row	xxxx0395	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Toggle row	xxxx4088	<input type="checkbox"/>	<input type="checkbox"/>

Note: The save button below applies to the current tab only. Once all tabs have been completed and saved, click the submit button at the top of the page.

[Save Changes](#) [Reset](#)

Select which FX Wires Entitlements will be available for beneficiaries and accounts.

1 Use the Toggle row feature to enable all entitlements for the selected account at one time

2 Use the top-row check box to enable all accounts for an individual entitlement

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

FX Wire User Limits

Message Center 64 Notifications Cut-Off Times Last Login: 05/28/2021, 10:20 AM, CST Hi, Jennifer

DASHBOARD ACCOUNTS PAYMENTS REPORTING ADMIN

[Back to User List](#)

Jane User

Status: Inactive Submit for Enrollment

Edited by Jennifer A 05/28/2021 at 12:11PM

Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. [Discard All Edits](#)

FX Wire User Limits

Product Daily Limit:

Total Daily Limit: **1**

Approval Limit: **2**

Account Number

Account Number	Company Account Transaction Limit	Transaction Limit	Company Account Daily Limit	Daily Limit
xxxx0395	\$200,000,000.00	<input type="text" value="\$100,000.00"/> 3	\$200,000,000.00	<input type="text" value="\$500,000.00"/> 4
xxxx4088	\$200,000,000.00	<input type="text" value="\$0.00"/>	\$200,000,000.00	<input type="text" value="\$0.00"/>

Note: The save button below applies to the current tab only. Once all tabs have been completed and saved, click the submit button at the top of the page.

Save Changes Reset

Set the following FX Wire User Limits:

1 Total Daily Limit – Amount this user is allowed to initiate across wire accounts in a single day. Note: the total daily limit cannot be more than the total of the daily limit set for all accounts.

2 Approval Limit – Dollar amount per wire this user is allowed to approve.

Account Limits

3 Transaction Limit – Limit this user can initiate for each transaction.

4 Daily Limit – Limit this user can initiate for this account.

Note: You must Save Changes on each screen of the New User setup before clicking Submitting for Enrollment

New User Configuration

User List

Message Center Notifications Cut-Off Times Last Login: 05/28/2021, 10:20 AM, CST Hi, Jennifer

DASHBOARD ACCOUNTS PAYMENTS REPORTING ADMIN

User List

Create New User

Type to filter

Login ID	User Name	Enrollment Status	Status	Actions
		Enrolled	<input checked="" type="checkbox"/>	Actions
		Enrolled	<input checked="" type="checkbox"/>	Actions
		Enrolled	<input checked="" type="checkbox"/>	Actions
		Not Enrolled New	<input type="checkbox"/>	Actions
		Enrolled	<input checked="" type="checkbox"/>	View User Edit User 1
		Enrolled	<input checked="" type="checkbox"/>	Actions

1 If you do not finish establishing all entitlements and settings for a user, you can continue making changes by selecting Edit User from the Actions drop-down menu on the User List.

Message Center Notifications Cut-Off Times Last Login: 05/28/2021, 10:20 AM, CST Hi, Jennifer

DASHBOARD ACCOUNTS PAYMENTS REPORTING ADMIN

[Back to User List](#)

Jane User

Status: Inactive

Submit for Enrollment **2**

Edited by Jennifer A 05/28/2021 at 12:11PM

Note: Changes have been made to this user that have not been submitted for enrollment. You may resume editing, submit the current edits for enrollment, or you may take the option to discard all edits. [Discard All Edits](#)

User Information

Account Access	Name: *	Jane User
IP Access	Login ID: *	janeuser42
Time Access	Department:	

2 Choose Submit for Enrollment to finish the user setup process.

janeuser42	Jane User Admin	3 Enrolled	<input checked="" type="checkbox"/>	Actions
	Jennifer A		<input checked="" type="checkbox"/>	Actions

3 The user shows Enrolled on the User List and they have been sent an email with instructions for logging in and establishing a password.