

**U.S. BANK®**

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Agency/Organization Program Coordinator (A/OPC)

# **User Guide to On – Line Registration**

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## Overview

On – Line Registration allows you greater access to C.A.R.E in addition to a streamlined process for establishing Cardholder access. With On – Line Registration, Cardholders can create their own C.A.R.E. User ID's and Passwords. A/OPC's and System Administrators still need to have their User ID's and Passwords setup by the U.S. Bank System Administration group. If a Cardholder enters invalid information more than three times they are locked out of On – Line Registration. Customer Service and A/OPC's are able to unlock locked accounts, using the functionality called *Unlock Account*, which allows a Cardholder to try On – Line Registration again.



**Tip !**

Accounts in T9 status cannot use the On – Line Registration tool.

## Functionality Table

Function Performed	System Requirements	Users
On – Line Registration	<ul style="list-style-type: none"><li>Relationship Registration Code must be assigned at the Relationship level.</li><li>On – Line Registration Flag at the Managing Account Level must be turned on.</li></ul>	New Cardholders with no C.A.R.E. User ID or Password
Unlocking a User	<ul style="list-style-type: none"><li>On – Line Registration must be enabled.</li><li>Locked Cardholder accounts must exist.</li></ul>	A/OPC's and Customer Service
Improved Account Maintenance Navigation.	<ul style="list-style-type: none"><li>None</li></ul>	A/OPC's System Administrators

## New Terminology

**On- Line Registration Flag** – This is set-up at the Managing Account level on the Account Information tab and is designed to add flexibility for managing On – Line Registration. The default for the flag is “Yes”, which simply enables the flag for On – Line Registration.

**Relationship Registration Code** – This code serves two purposes; first it allows System Administrators easy maintenance of On- Line Registration, second it is an additional validation element for the Cardholder when they are registering. The format and requirements for this code are the same as for the C.A.R.E. password (i.e. 8-12 characters in length and they must have at least one alpha and one numeric character).

**User Profile Code** – This appears to you as an additional validation element, however, it is an Operational Filter that everyone must have in order to use C.A.R.E. When Cardholders enter their User Profile Code the system automatically assigns the corresponding Operational Filter.

The Relationship Registration Codes and the User Profile Codes are set up by System Administrators and distributed to A/OPC’s who, in turn, distribute these codes to their Cardholders along with the C.A.R.E. web address.

## Cardholder - On – Line Registration Process

This process is designed for new Cardholder accounts that do not currently have a C.A.R.E. User ID or Password assigned to them. Only Cardholder accounts are enabled to use the On – Line Registration tool. Managing Accounts cannot use On – Line Registration.

1. Access the C.A.R.E. web address (<https://care.usbank.com>).
2. At the C.A.R.E. log on screen, click **On – Line Registration** on the task bar.
3. Enter the Relationship Registration and User Profile Codes.
4. Click **OK**.
5. To add the accounts associated with the User ID and Password being established, enter the **Account Number**, **Account Expiration Date** and **Zip Code** in the appropriate fields.



### Tip !

- Both Travel and Purchasing Card account information may be added.
  - Zip code format: Five digits. Foreign users enter: 00002
  - Expiration date format: MM/YY
  - Information in the table may be edited. Once it is verified and moved to the area below it cannot be edited.
- You may enter up to ten accounts at a time to one user. If more than ten accounts are needed, click **Add more accounts** and more rows display.
  - If any of the entered information is not valid, the system returns an error message. You have three attempts to correct the information. If all three attempts fail, the accounts with incorrect information are locked out from On - Line Registration.

6. After all accounts are entered, click **OK**. The system validates account information.
7. Enter **Contact Information**.
8. Enter **User ID, User Verification and Password**.



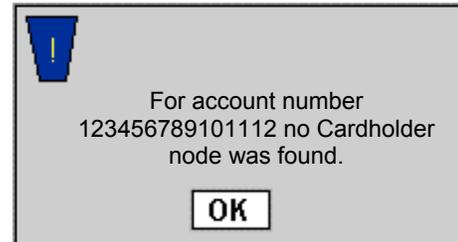
### Tip !

- Zip code format: Five digits. Foreign Users enter:00002
  - Phone and Fax number format: No dashes, hyphens, parenthesis or spaces (i.e. 6121234567).
  - Fields that require data are identified with an asterisk (\*).
  - User ID's must be 7 to 12 characters in length, with at least one alpha and one numeric character.
- User ID's must also be unique; try to think of a distinctive ID (i.e. if your name is John F Smith try the User ID jofsmith3).
  - User Verification is used to authenticate you if you forget your User ID or Password. Passwords must be 8 to 12 characters in length, with at least one alpha and one numeric character.
9. Click **Submit**. The system validates your entries.
  10. Click **OK** in the *On – Line Registration was successful* dialog box. You are brought to the C.A.R.E. login screen where you are prompted to change your password. This will be your password for the next 100 days.

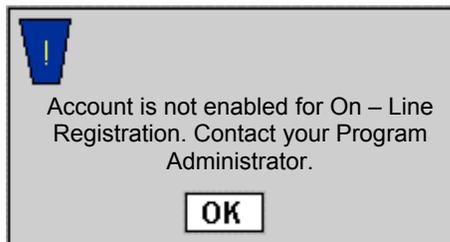
## Troubleshooting On – Line Registration Error Messages



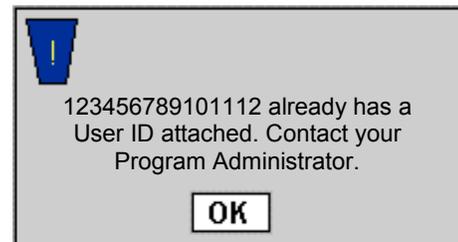
Account information is invalid or missing. Please check the information carefully (look for any zip code or expiration date formatting mistakes) and correct any errors.



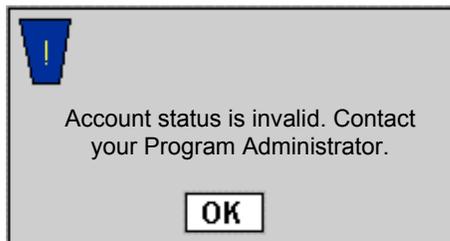
The account number entered could not be verified by U.S. Bank, please check the number and correct any errors.



The Managing Account is not enabled for On – Line Registration.



A Cardholder User ID has already been assigned to the account.



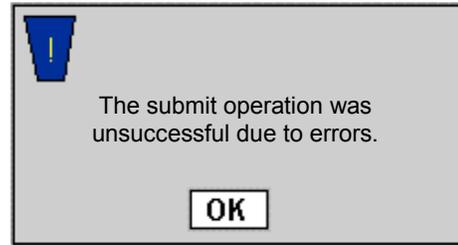
U.S. Bank has flagged the account as invalid.



Check to make sure you did not enter duplicate account numbers. Remove the duplicate account number and correct the information.



Invalid information was entered three or more times and the account is now locked.



There are formatting errors in some of the information you entered. Carefully check the information against the formatting guidelines outlined in this document and try the entry again.

## A/OPC - Unlocking an Account



### Tip !

Customer Service and A/OPC's can unlock accounts giving Cardholders another chance at On - Line Registration if their first attempt failed. *Unlock an Account* is a new option under the *Administration* high level task.

There are multiple ways you can unlock a Cardholder account:

- Enter a specific Cardholder account.
  - Search by Cardholder name.
  - Search by Managing Account if there are many accounts that need to be unlocked.
  - Drilling down the hierarchy tree.
1. Under the Administration High Level Task, click the **Unlock Account** option.
  2. If there are multiple accounts to unlock enter the Managing Account number, if there is a single account to unlock enter either the Cardholder's account number or the Cardholders' last name.
  3. Click **OK**.



### Tip !

To unlock all accounts under the Managing Account, click the **Select All** button. If there are more than 50 accounts associated with the Managing Account, the *Next Page* link appears at the bottom of the page, which allows you to view all of the unlocked accounts.

Drilling down the hierarchy tree; find the Cardholder account number, manually type the account number in the *Cardholder account number* field, erase the information in the *C.A.R.E. hierarchy node* field and click **OK**. Full functionality of this feature is not currently available, look for this update in a future release.

4. To unlock a single or a few specific account(s), click in the box beside the Cardholders name. A check mark appears in the box to show the account is selected.
5. Once all the necessary accounts are selected, click **Submit**.
6. Click **OK** in the *Selected Accounts have been unlocked* dialog box.
7. The Unlock Account screen appears again, if you need to unlock additional accounts under a different Managing Account, Cardholder's account number, or Cardholder's last name you may do so at this time. If you are finished unlocking accounts, you can proceed to another area of C.A.R.E. or Log Out.

## Troubleshooting Unlock an Account Error Messages



Enter only a Managing Account number or Cardholder Information, not both.



The Managing Account entered does not have any locked accounts. Check to make sure the Cardholder is associated with the correct Managing Account.



The account selected is not locked. Check the account number and try again.



The selected Cardholder account is not locked, check the account number and try again.

## Frequently Asked Questions

- Q.** How often can I reset my password?
- A.** There is no limit to the amount of times you may reset your password.
- Q.** Can I use On - Line Registration if I already have a User ID and I need to add more accounts to it?
- A.** No, On - Line Registration is designed for new C.A.R.E. users only.
- Q.** How do I get my Relationship Registration Code and User Profile Code?
- A.** This information is available from your Relationship Manager.
- Q.** Can I reset my password if it was deactivated?
- A.** No, your User ID must be in active status to use C.A.R.E. and the On - Line Registration tool.
- Q.** What is the format for User ID's and Password's?
- A.** User ID's must be 7 to 12 Characters in length and they must have at least one alpha and one numeric character.  
User Password's must be 8 to 12 characters in length and they must have at least one alpha and one numeric character.
- Q.** Can I use On - Line Registration for more than one account?
- A.** Yes, you can register an unlimited number of accounts
- Q.** Why is my account locked?
- A.** Accounts are locked when invalid information is entered three times.
- Q.** Can an A/OPC become a C.A.R.E. user via the On - Line Registration?
- A.** If an A/OPC has a individual Cardholder account, yes you may use On - Line Registration. An A/OPC cannot use On - Line Registration for Managing Accounts.

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