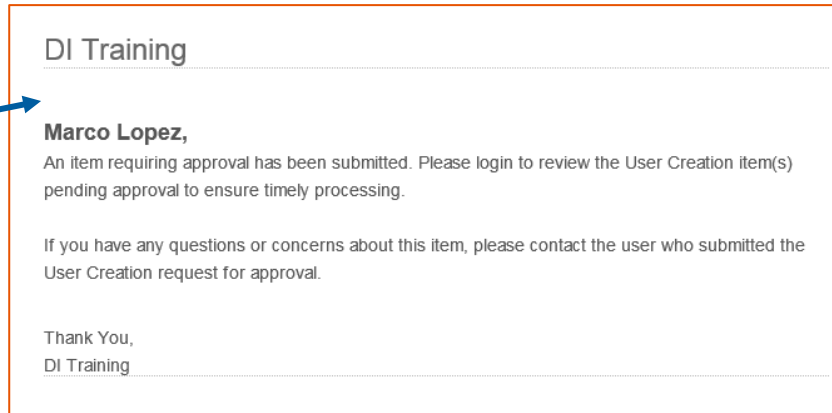**SOUTH SHORE BANK**

If the company has at least one Secondary Admin, approval is required for new users. Only the Primary Admin or a Secondary Admin can approve a user.

After adding a new user,
- user status is "Setup Pending".
- emails are sent to other Business Admin(s)
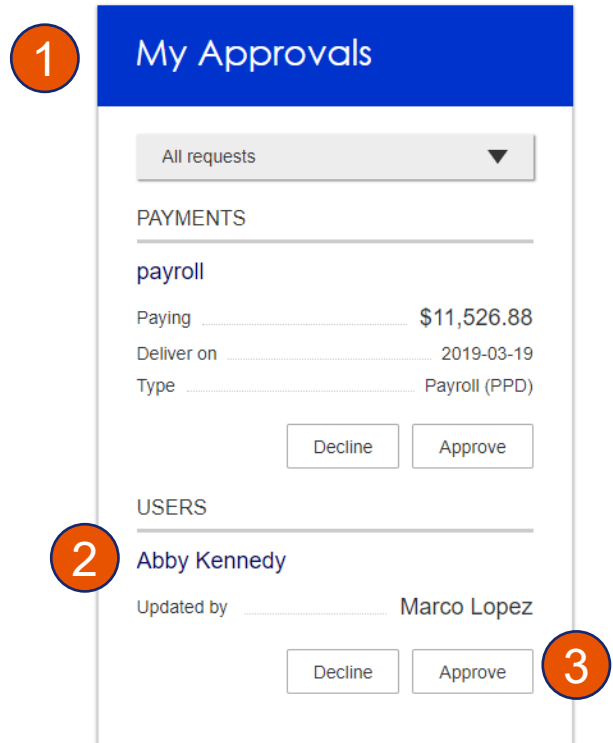- the user's name shows in the Approval widget

Edits to a user also require approval. Password resets do not count as an edit.

DI Training

Marco Lopez,
An item requiring approval has been submitted. Please login to review the User Creation item(s) pending approval to ensure timely processing.

If you have any questions or concerns about this item, please contact the user who submitted the User Creation request for approval.

Thank You,
DI Training

Steps to Approve a User:

1. Go to My Approvals widget.
2. Click the user's name to review details.
3. Click Approve.

If **Decline** is selected, the user moves to Declined Payments activity and sends an email to the initiator.

Tip: Users requiring approval stay on My Approvals widget indefinitely.

①

My Approvals

All requests ▼

PAYMENTS

payroll

Paying	$11,526.88
Deliver on	2019-03-19
Type	Payroll (PPD)

[Decline] [Approve]

USERS

② Abby Kennedy

Updated by _____ Marco Lopez

[Decline] [Approve] **③**

4. A pop-up prompts the Admin to verify identity.
   a. Call Me - answer the phone and press "1" (one) per the automated instructions.
   b. Text Me - receive the text and reply back with the security code.
   c. Enter Security Code (not shown below) – use token to generate a one time security code
5. If successful, the system sends the user 2 emails with username and password, and the user's status changes to Active.
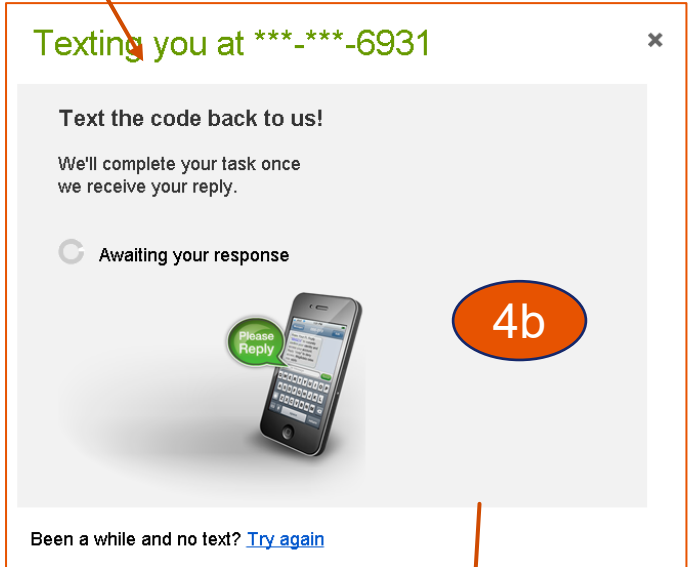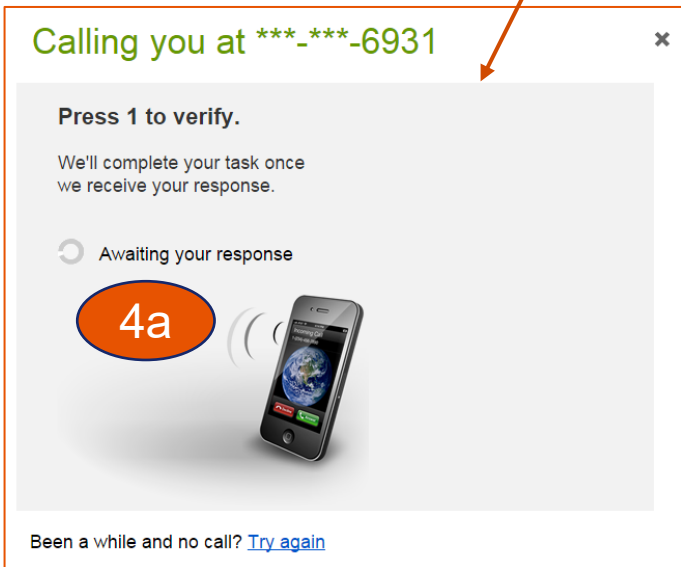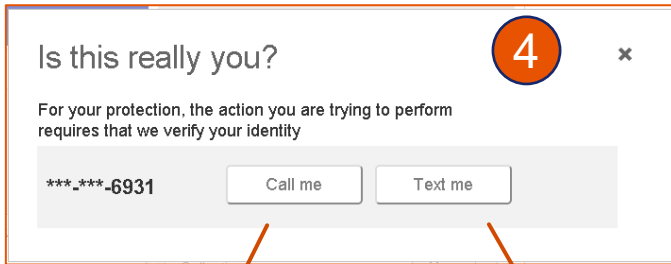
Tips:
- If your FI offers tokens, the Admin may enter the token security code (not shown here).
- The pop-up closes after 5 minutes.
- If the Admin closes the pop-up before completing verification, approval will not go through.