

Card Activation, Card Balance Inquiry, System Support and F.A.Q's

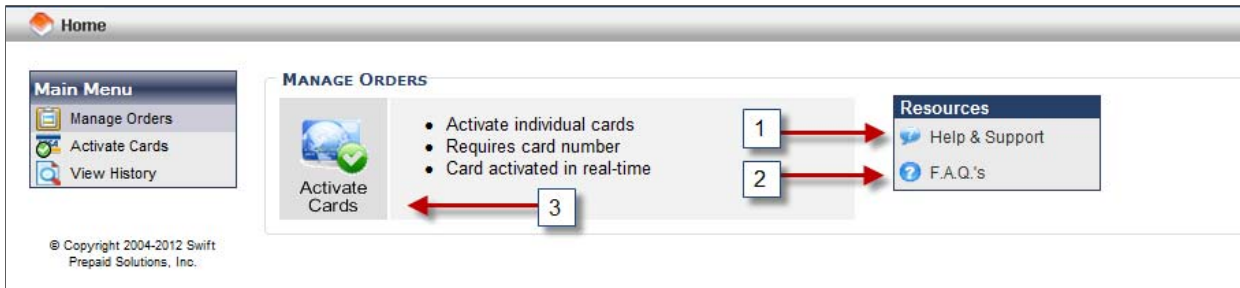
- Once the user logs in they will be presented with the landing page and three options:
 - Manage Orders
 - Activate Cards
 - View History
- Select Manage Orders (1)

The screenshot shows a web application interface. At the top, there are navigation links: Home, Contact Us, FAQ's, and Log Out. The main content area is titled 'WELCOME, JANI IRELAND' and contains a message: 'Please verify your information. If any of the following is inaccurate, please contact your program administrator.' Below this message is a table of user information:

Client ID:	UNI02
Your Name	JANI IRELAND
Company Name	UNIVERSITY OF LOUISVILLE
Location ID	GRADUATE MEDICAL EDUCATION
Phone #	(502) 852-7497 Ext: Edit
Email Address	JLIREL01@LOUISVILLE.COM Edit
Address	201 E. WARNOCK ST., CONTROLLER'S OFFICE LOUISVILLE, KY-KENTUCKY 40208
Program Administrator	KERRY SCHMIDT
Program Admin Phone	(502) 852-6273 ext:

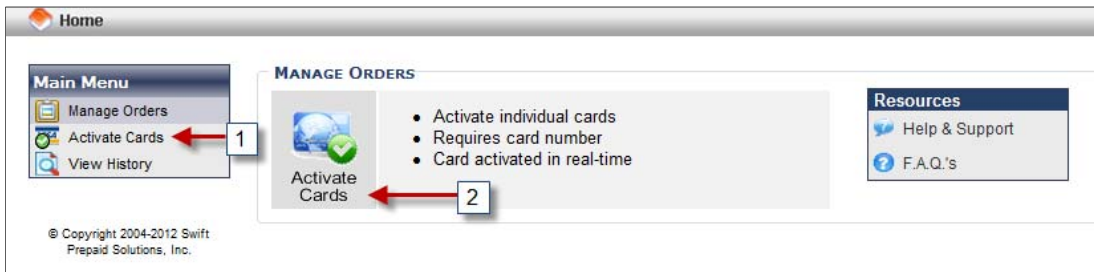
Below the table, there are fields for 'Security Question' (WHAT IS YOUR PET'S NAME), 'Security Answer' (with an [Edit](#) link), and 'Password' (with a [Change Password](#) link). At the bottom, a footer message reads: 'This site will allow you to manage your prepaid programs provided by Swift Prepaid Solutions, Inc. Please follow the tabs on the left margins of the page to guide you thru the available options to manage your programs.'

- Once on the Manage Orders module, the user will have 3 options:
 - Help & Support (1)
 - F.A.Q's (2)
 - Activate Cards (3)

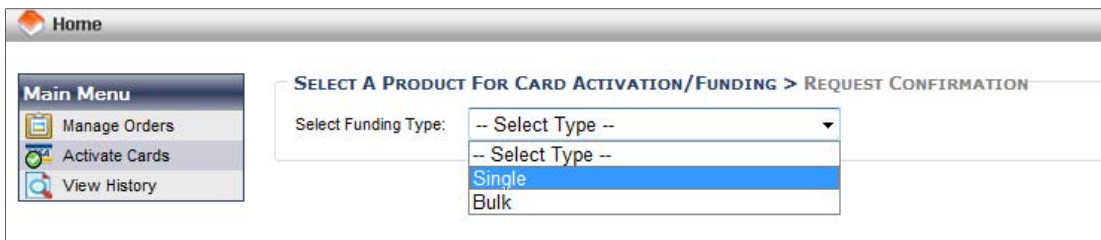


Card Activation & Funding:

- To Activate cards, the user can select either Activate Cards via the Main Menu table (1) or via the Activate Cards Icon (2)



- The User will be presented with a drop down offering two options
 - Single – Ready for Use
 - Bulk – Not Using this Functionality at this time



- Below is a sample card activation completed template

Enter Card Number to Activate

Card Number to Activate: 4195 0404 8000 0028

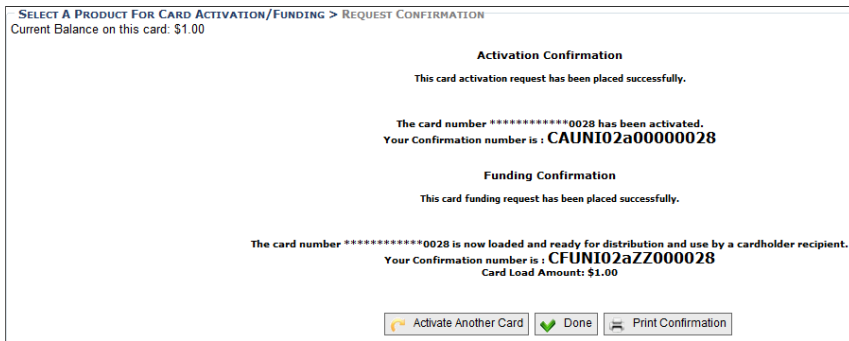
Amount to fund: 1.00

Project Details:

Payee Fields	University Fields
First Name: * SAM	Funding Source: * D0077
Last Name: * ADAMS	Account Number: * 545150 <input type="checkbox"/> Human Subject
Address 1: * 102 MAIN ST.	Type of payment: * Study Participant
Address 2:	Employee ID Number
City: * LOUISVILLE	Study: MK-1862A
State: * KY-KENTUCKY	Notes: TEST
Zip: * 40200	
Social Security Number: * 111111111	
Phone:	
Email:	
Participant Code:	

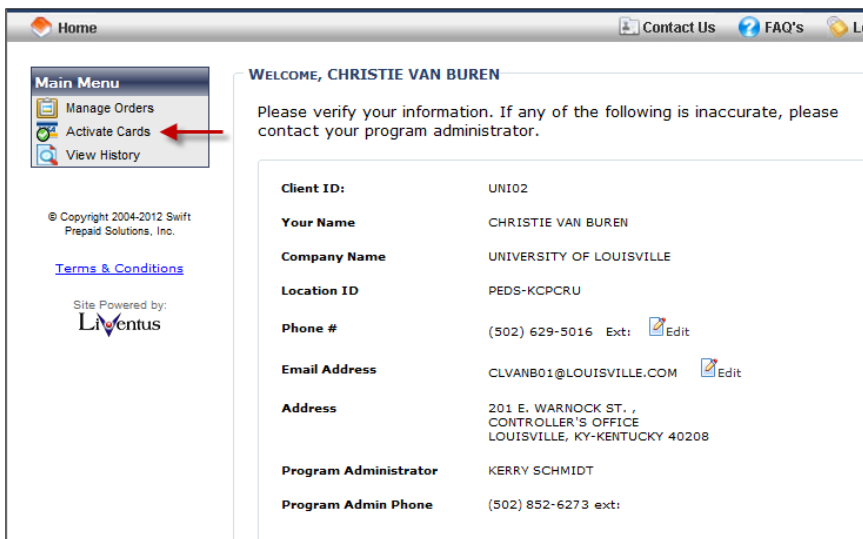
- Required fields are indicated by an *
- Free Form Fields
 - Social Security Number: It is extremely important that the SSN is entered correctly as this impacts many backend reports and will be verified with the IRS (and will subsequently impact future payments to the payee).
 - Funding Source: It is extremely important that the speed type is entered correctly
 - If you are unsure of your Funding Source, please check with your Unit Business Manager
- If the payee is an employee and the payment is *not* study related, the user MUST enter an Employee ID #

- Successful activation will generate the following message:

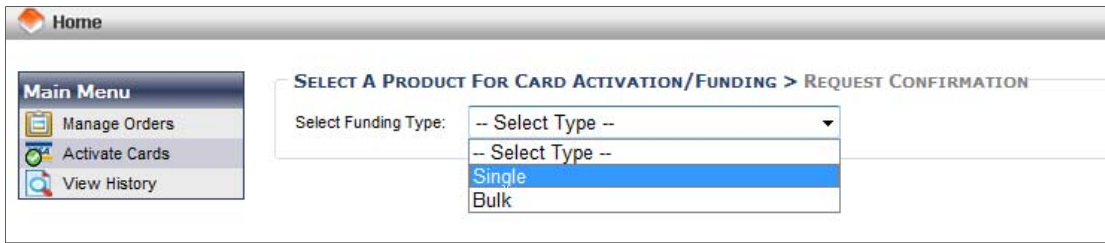


Card Balance Inquiry:

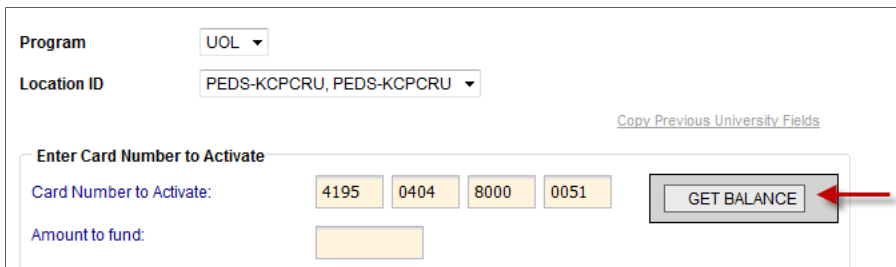
- A user can quickly look up the current value on a card by clicking on Activate Cards (on the landing page).



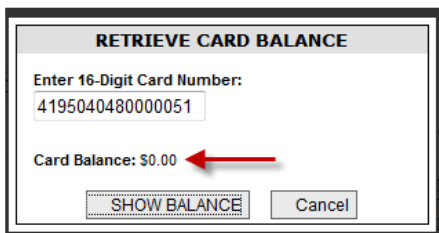
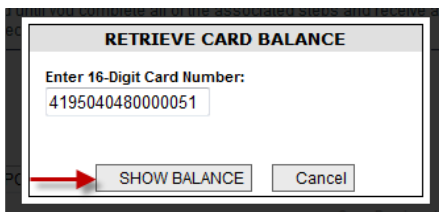
- The user will then select Single as the Funding type and be presented with the Activation module.



- The user will then enter the 16 digit card number and select Get Balance

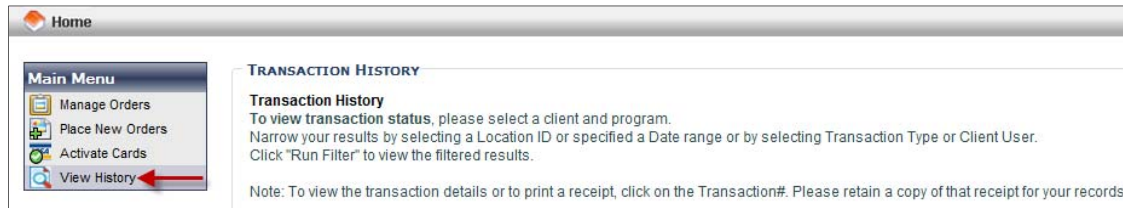


- The user will receive the prompt below. Simply select Show Balance to display the current value on the card



View History

- From the Landing Page, the user can navigate to the View History module by clicking View History



- After selecting View History, the user will have three ways to filter for results:
 - Location ID – This will be limited to the location you are assigned to
 - Filter Criteria (Date, Transaction Type, User)
 - Date: The date of the transaction
 - Transaction Type: Provides additional filtering options
 - Individual Card Activations
 - Individual Card Funding
 - Returned Card Credit
 - Bulk Order Placed
 - Bulk Order Shipment Confirmed
 - User: The user that initiated the transaction
 -
- Results will be displayed similar to the screen shot below:
- The user can click on the headers to sort each column

View History

Select a Program: UOL ▾

Search Card Funding Transactions

Select a filter

Location ID All ▾

Filter Criteria Date ▾

Select Date Range: 5/29/2012 to 5/29/2012

Run Filter

Transaction Initiated By	Date of Transaction	Transaction#	Transaction Type	Status	Location ID	Notes
KERRY ELIZABETH SCHMIDT	5/29/2012 11:04:31 PM	CFUNI02aZZ000028	Card Funding Request	Funded	PEDS - KCPCRU	Notes
KERRY ELIZABETH SCHMIDT	5/29/2012 11:04:24 PM	CAUNI02a00000028	Card Activation Request	Activated	PEDS - KCPCRU	Notes
KERRY ELIZABETH SCHMIDT	5/29/2012 10:36:31 PM	OUNI02a00001	Order Request	Pending	CORPORATE	Notes

1

Search Card Funding Transactions

- From the View History Module, the user may also select the Search Card Funding Transactions to view more details on a specific card(s)

View History

Select a Program: UOL ▾

Search Card Funding Transactions

Select a filter

Location ID All ▾

Filter Criteria Transaction Type ▾

Transaction Type All ▾

Select Status: All ▾

Run Filter

Transaction Initiated By	Date of Transaction	Transaction#	Transaction Type	Status	Location ID	Notes
KERRY ELIZABETH SCHMIDT	5/29/2012 11:04:31 PM	CFUNI02aZZ000028	Card Funding Request	Funded	PEDS - KCPCRU	Notes
KERRY ELIZABETH SCHMIDT	5/29/2012 11:04:24 PM	CAUNI02a00000028	Card Activation Request	Activated	PEDS - KCPCRU	Notes
KERRY ELIZABETH SCHMIDT	5/29/2012 10:36:31 PM	OUNI02a00001	Order Request	Pending	CORPORATE	Notes

- The User can filter by any of the following options
 - Funding Source
 - First Name
 - Last Name
 - Employee ID
 - Program – Will always be UoL
 - Location
 - Study
 - Funded
 - Transaction Initiated By
 - Card Number
- If no filter criteria is entered, the system will default to activity for the current day

VIEW HISTORY > CARD FUNDING TRANSACTIONS

Search Card Funding Transactions
Narrow your results by selecting one or more options!
Click "Search" to view the filtered results.

Search Card Funding Transactions

Funding Source: **First Name:** **Last Name:** **Employee ID:**

Program: **Location:** **Study:** **Funded:** -

Transaction Initiated By: **Card Number:**

- Search Results will be displayed similar to the screen below
 - Results can be exported to Microsoft Excel and Microsoft Word
- The user can “Restore Card”
 - This removes and de-activates the card and returns it to available inventory
 - This should be used if a card is funded in error

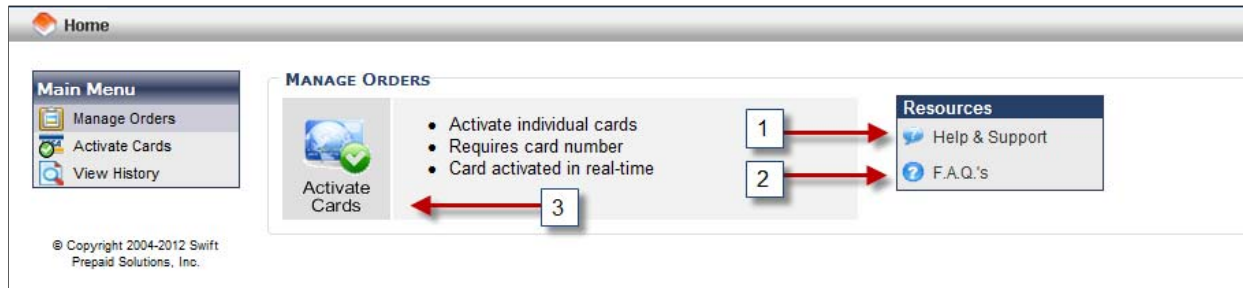
Export: Print:

Display records per page | Displaying page 1 of 1 Total Cards Funded: 1 Total Funds:

View Restored Only	Transaction Initiated By	Username	Date of Transaction	Transaction#	Status	Location ID	FundAmount	First Name	Last Name	FundingSource	AccountNumber	TypeOfPayment	Study	Notes	ChildFundingID
Restore Card	KERRY ELIZABETH SCHMIDT	KEKOHL02@LOUISVILLE.EDU	05/30/12 3:11:18 PM	CFUNI02aZZ010028	Funded	CORPORATE	1.00	SAM	ADAMS	D0077	545150 Human Subject	Study Participant	MK-1862A	Test	

Help & Support:

- From the Manage Orders page, click on Help & Support.



- The Help & Support module will require the user to enter the information below and a request will be submitted to Swift for resolution. It is usually a good idea to contact your Program Administrator before submitting an issue to Swift, as he/she may already be aware of issue and the resolution.

HELP AND SUPPORT

In order that we may more promptly respond to and help you solve your problems, please fill out this support form as completely as possible. The information you provide at this time is required for us to assist you with your issue. One of our Tech Support Representatives will respond to you as soon as possible.

First Name

Last Name

Email Address

Connection Speed

Operating System

Web Browser

Screen Resolution

Nature / Topic

Message

FAQ's:

- The F.A.Q.'s module will walk the user through these 10 common technical issues. If you are still experiencing application issues, please submit a ticket through the Help and Support module documented above.

TECH SUPPORT FAQ'S

Top 10 Frequently Asked Questions (FAQs) *last updated March 2007*

1. Why can't I edit all of the information on the Welcome page?
2. I need to change my password.
3. Why can't I change the shipping address where the order is being shipped to?
4. When I place an order I receive an error message telling me I have exceeded my order limits.
5. I need access to additional functions and rights over additional locations.
6. When will my card order ship?
7. When will my card order be activated?
8. When will my credit post to my account?
9. I entered in a transaction but I can't find that transaction anywhere.
10. I am having problems with your site