

## **BANK OF AMERICA CUSTOMER SUPPORT CUSTOMER SERVICE REPRESENTATIVE GUIDE**

### **ENHANCED CARDHOLDER WEBSITE SUPPORT WEBSITE ACCESS AND ACCOUNT CREATION**

As a Customer Support Representative for Bank of America, it is imperative that you provide as much information to your customer as you can. It is your goal to ensure that the customer has the knowledge that they can access their basic account information without having to call and endure long holds during these trying times. The purpose of this guide is to focus on online account creation for unemployment cardholders.

#### **A. WEBSITE ACCESS GENERAL INFORMATION**

- The website is compatible for all modern browser types and utilizes a responsive design, which means it will adjust to the cardholder's device that it is being accessed from. If being accessed on a small device (iPhone, Android), the website design will appear different than if accessed on a laptop or tablet – it will be optimized for each display. However, the functions available are the same for all devices.
- Supported browsers: Internet Explorer: IE9, IE10, and IE11. Most current versions of Firefox and Safari. Google Chrome is highly recommended for optimal website performance.
- Cardholders can access the website 24/7/365, UNLESS their card is CLOSED. Website access is terminated 90 days after the card is CLOSED.
- Some browsers have “auto-fill” capabilities, which allow the user to save information and pre-populate into the sign in boxes for some websites. The unemployment cardholder website has “auto-fill” disabled. Therefore, if the cardholder attempts sign in and is unsuccessful, clearing the browser cache (CTRL + SHIFT + DEL) will fix the issue.

*The website is fully conformant to the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA. This ensures that the website can be accessed by all persons, regardless of disability.*

#### **B. WEBSITE SIGN IN VIA CARD ACTIVATION**

This method of account creation is to be followed to first login to the website when the card has been “Issued” but not yet activated. Completing these steps will also activate the card.

1. Select *Activate My Card* on the top menu bar. Cardholder will be prompted to enter their 16-digit card number and select *Continue*.

Activate My Card

Card Number \*  \* Required fields

Continue

2. *Verify Your Identity* page will display, prompting the cardholder for the activation tokens for the unemployment program. Once completed, select *Continue*.

Verify Your Identity

Expiration Date Month \*  \* Required fields

Expiration Date Year \*

Last 4 of Social Security Number \*

3-Digit Security Code \*

Back Cancel Continue

3. *Security Information* page will display, prompting the cardholder to register for the website and set up their PIN. Username, password, email, and security question will need to be established to access the website. Select *Continue*.
  - a. Username must be 6-16 characters.
  - b. Password must be 7-16 characters and must include at least one letter and one number.

Security Information

Website Registration \* Required fields

Username \*  6-16 characters

Password \*  Password must contain 7 - 16 characters and must include at least 1 letter and at least 1 number.

Re-Enter \*

Email Address \*

Security Question \*

Security Answer \*  3-50 characters

Select PIN

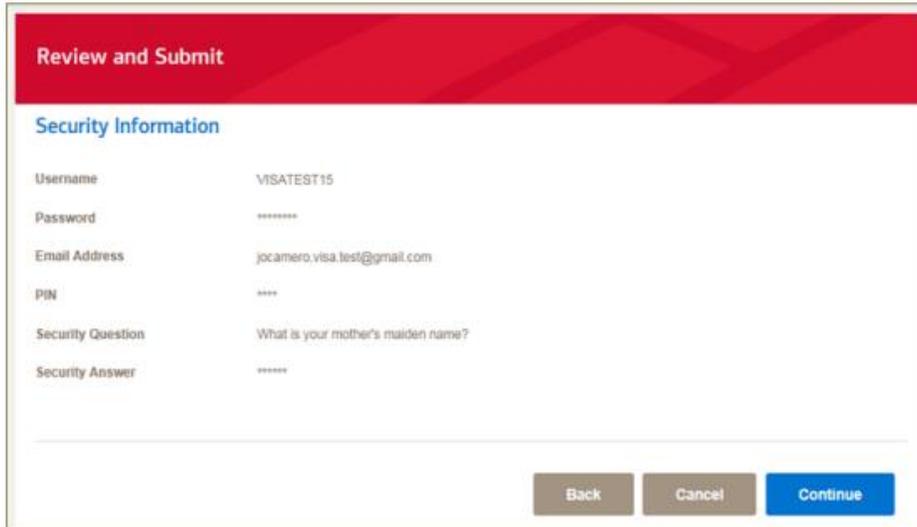
You can use your PIN to withdraw cash from ATMs or (optionally) when making purchases with your card.

PIN \*  4 digit number

Re-Enter \*

Back Cancel Continue

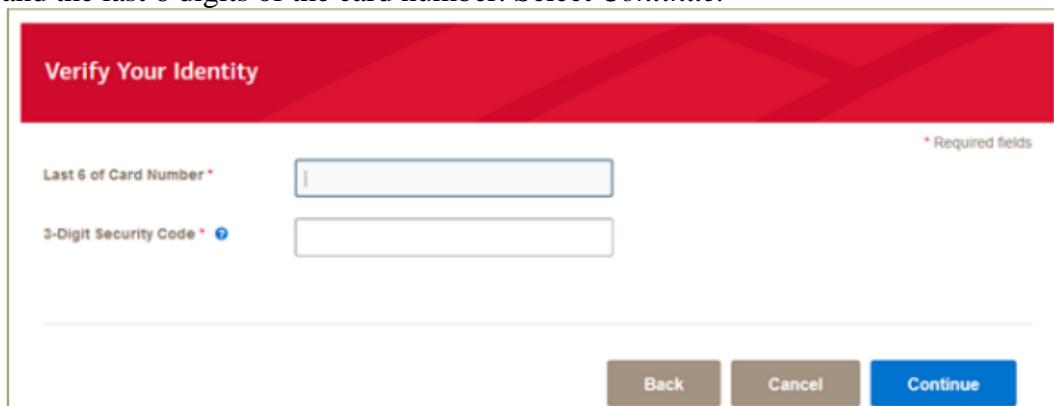
4. *Review and Submit* page will display, and cardholder must review the information they provide for accuracy. Select *Continue*, and card will be activated, and username will be established for website access. *Balance & Transactions* page will display upon successful login.



### C. WEBSITE SIGN IN (CARD ALREADY ACTIVE)

This method of account creation is to be followed to first login to the website when the cardholder has already “Activated” their card.

1. *Sign In* box may be used for the first time the cardholder accesses the website. Cardholder must enter their 16-digit card number and select *Sign In*.
2. *Verify Your Identity* page will display. The cardholder will be prompted to enter their 3-digit Security Code (the 3 digits located on the signature line on the back of their card), and the last 6 digits of the card number. Select *Continue*.



3. *Security Information* page will display for web registration. Cardholder will be prompted to create a username, password, and security question for the website. If an email is not

already on the account, they will be required to enter it during website registration. Select *Continue*.

- a. Username must be 6-16 characters.
- b. Password must be 7-16 characters and must include at least one letter and one number.

The screenshot shows a 'Security Information' registration form. It includes fields for Username (6-16 characters), Password (7-16 characters, must include at least one letter and one number), Re-Enter, Email Address, Security Question (a dropdown menu), and Security Answer (3-50 characters). There are 'Back', 'Cancel', and 'Continue' buttons at the bottom right.

4. *Balance & Transactions* page will display upon successful login.

The screenshot shows the 'Balance & Transactions' page for a CashPay Card. The page displays the 'Available Balance' as \$0.00 and the 'Actual Balance' as \$0.00. Below this, it shows 'Transactions' with the message 'No Transactions found.' and a 'Print' button. The page header includes the Bank of America logo, 'CashPay Card', and a 'Sign Out' link. The footer contains links for 'FEE INFORMATION', 'FAQ', 'SITE MAP', 'CONTACT US', 'PRIVACY / SECURITY', 'TERMS & CONDITIONS', and 'ATM LOCATOR', along with the text 'BANK OF AMERICA, N.A.'