



## Preparing to go live - cardholder template

### TEMPLATE INSTRUCTIONS

#### Send to cardholders approximately 30 days prior to go live date

- Copy and paste the text below into a new email.
- Personalize the <text> in the email below and remove any content that is not applicable to your program. Refer to the dates in the email you received from us to populate the date fields.
- Copy and paste the subject line in the email: **[Action Required] Activate your new commercial card account with U.S. Bank**
- Add your signature block (if applicable) to the email and send.

Dear <CH first name>

We've been issued new U.S. Bank commercial cards as part of the transition from Union Bank to U.S. Bank. Upon receipt of your new card, please activate your card at [www.access.usbank.com](https://www.access.usbank.com).

Steps to activate your card:

1. Select **Activate Your Card**
2. Enter requested card information, card number, expiration date and last 4 of work phone.
3. You will be sent two emails; the first email includes the link to activate your account, and the second email includes a passcode.
4. Select the emailed link to activate your account and then enter the passcode from the second email. You will also be given the option to update your mobile phone number. Select **Submit**.
5. Set New PIN. Select **Submit**.

Some things to keep in mind:

- Remember to contact merchants that may have your old account number on file and provide them with your new account number.
- You must destroy your old card and begin using your new card no later than <date>.
- You should continue to submit any remaining expense reports for transactions on your old card and make sure balances are paid in full until all charges have been processed.
- Contact me if you do not receive your new card by <date>.
- **[Remove the following bullets below if your cardholders will not have access to Access Online]**
- You'll need to self-register for Access® Online. To do so, you'll need your new card and our organization's short name (OSN), which is <XXXX>. To begin the self-registration process, go to <https://access.usbank.com> and click on the *Register Online* link.
- With your credentials, you can now access an extensive library of self-paced training materials within Access Online. See the attached Learning Plan for a recommended training list.

- To receive notifications about your account activity, as well as to safeguard your account, sign up for notifications and account alerts under *My personal information* within Access Online.
- You can also download the Access Online mobile app from the App Store® or Google Play™ to stay on top of your expenses while on the go.

If you have any questions, please contact <name/contact info>.

Thank you,

[PA signature block]