

U.S. Bank Access[®] Online Effective Dating

Overview

Effective Dating is now available in U.S. Bank Access[®] Online Account Maintenance. This latest piece of functionality provides program administrators with the ability to schedule dates for account maintenance changes. Both temporary and permanent adjustments can be made in advance enabling clients to:

- Eliminate the need to track system changes with manual reminders, such as hand written notes or “tickler” files
- Automate account changes ensuring accounts are better managed based on the cardholders’ needs
- Improve efficiencies by minimizing the account support effort necessary to maintain accounts
- Increase management control and oversight into maintenance activities

How It Works

Available on cardholder accounts, this Access Online maintenance feature allows entitled users to make changes to the following data:

- Demographic information (e.g., an approaching change of address)
- Account information (e.g., organization name)
- Accounting code (e.g., temporary change for an employee working on a project for another department, or future permanent change for an employee who is moving to a different department)
- Authorization limits (e.g., cash advance, dollar limit, etc.)

To set a temporary change, the user must enter the start and end dates for the change. For a permanent change, the user must enter the start date but leave the end date blank.

This enhancement also allows program administrators to view all scheduled maintenance changes and make adjustments from one convenient location.

For More Information

To find out more about the Access Online Account Maintenance Effective Dating functionality, please contact your U.S. Bank Relationship Manager/Account Manager or Account Coordinator.