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.

Steps to Approve a User:

- I. 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.

	My Appr	ovals		
	All requests		•	
	PAYMENTS			
	payroll			
	Paying		\$11,526.88	l
	Deliver on		2019-03-19	l
	Туре		Payroll (PPD)	
		Decline	Approve	
	USERS			
2)	Abby Kennedy	,		
	Updated by		Marco Lopez	
		Decline	Approve	3
				ſ

- 4. A pop-up prompts the Admin to verify identity.
 - a. Call Me answer the phone and press "I" per the automated instructions.
 - b. Text Me receive the text and reply back with the security code.
- 5. If successful, the system sends the user 2 emails with username and password, and the user's status changes to Active.

Is this really you? For your protection, the action you are trying to per requires that we verify your identity ***-***-6931 Call me	rform 4
Calling you at ***-***-6931 ×	Texting you at ***-***-6931 ×
Press 1 to verify. We'll complete your task once we receive your response. Awaiting your response	Text the code back to us! We'll complete your task once we receive your reply. Awaiting your response Image: Complete your task once your reply. Image: Complete your task once your reply. Image: Complete your task once your reply. Image: Complete your reply.
Been a while and no call? <u>Try again</u>	Been a while and no text? <u>Try again</u>

Tips:

- The Admin will need to enter the security code as part of the authentication process in order to complete approval.
- The pop-up closes after 5 minutes.
- If the Admin closes the pop-up before completing verification, approval will not go through.