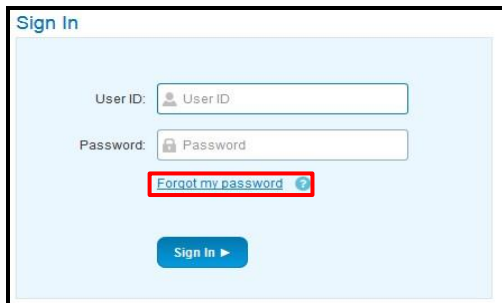


## GETTING STARTED

### Sign-In / Temporary Password

Obtain user id and temporary password from BMO email. Once the user logs in for the first time, the system will prompt the user to change the temporary password for a permanent one.



### Permanent Password requirements:

- Eight to 20 characters long
- Both lower and upper case letters
- At least one numeric character
- At least one special character

The system will request the user to create three security questions.

**Note:** If you forget your password, please use the link **“Forgot my password”** to reset it.

Three unsuccessful attempts will lock the user out of the system. Contact your program administrator in the CVS Business Department to unlock account.

### Home Page

On the Home Page, users will see:

- The **Main Menu** on the top
- **General Navigation** menu - top right
- **Card accounts** associated to their profile
- **Announcements** section
- **My Actions** section
- **Pinned** section – when users pin their favorites, they will appear on Home page

### Main Menu

The Main Menu is located at the top of the page. Menu options may vary per user.



### General Navigation

In the upper right corner, there are personal settings, help content, contact info for BMO and the logout button. They are located under the person’s head icon in a drop-down:

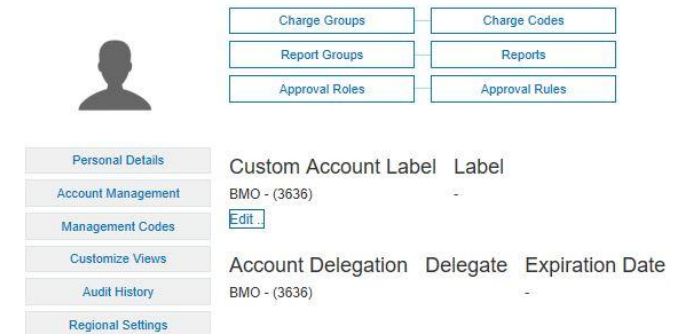


### Edit Account Label

Under Personal Settings, click on **Account Management** to change the generic Account Label and Account Delegation (if appropriate) to a *specific employee’s name* assigned that account.

### Personal Settings

The following diagram map is aimed to help you configure and manage your own personal settings. If you h



### Support Services

#### Online help:

Click on the **Help** button or access the online User Documentation by clicking on the Documents tab in the top navigation bar.

#### General Help:

Contact your program administrator in the CVS Business Department.

**To report a lost/stolen card or fraudulent transactions, call BMO Customer Service at 1-800-263-2263 as soon as possible**