

# PRIME Participant Site

Instructional Document

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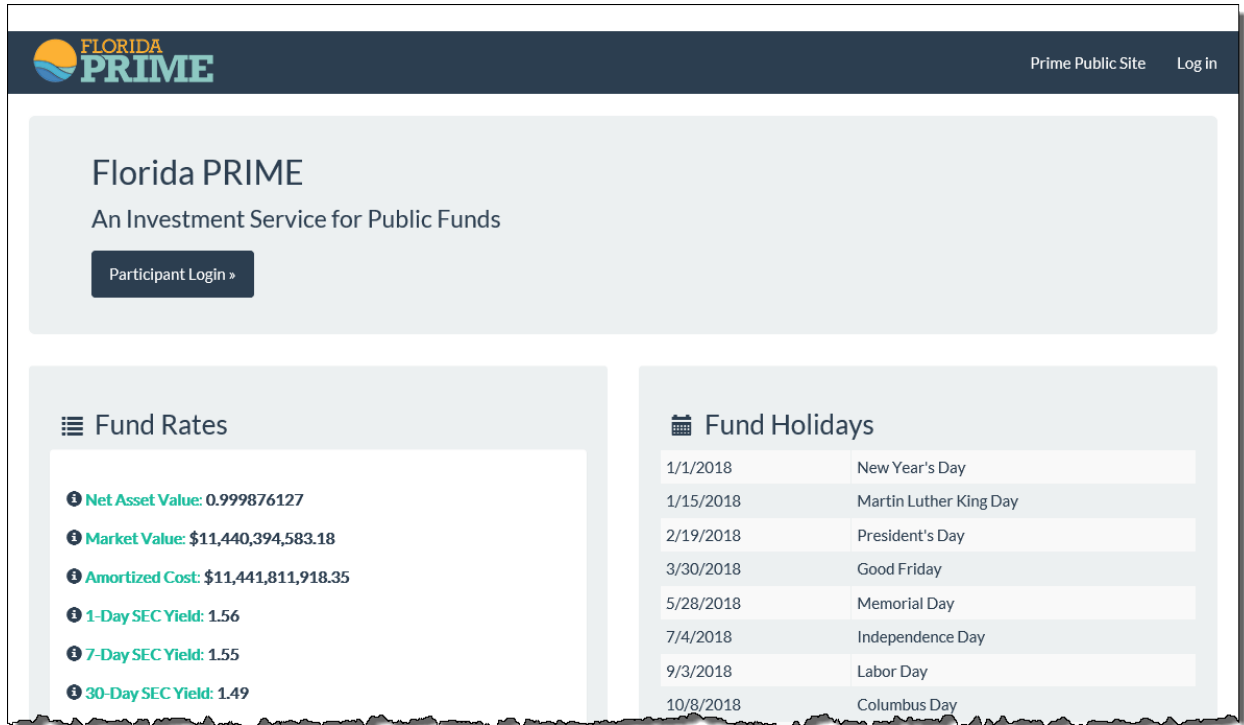
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## Landing Page Information:

The PRIME home page contains information about the current PRIME rates and fund holidays. In the upper navigation bar, there are links to the public PRIME site and participant site Log in. Please reference Figure 1 below.



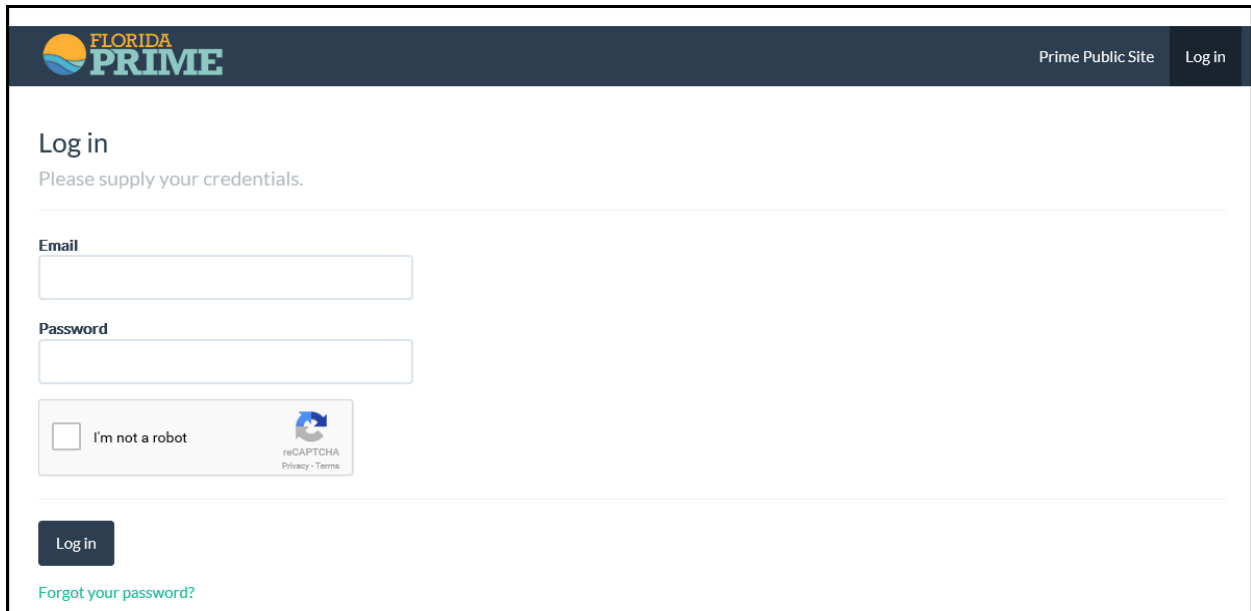
The screenshot displays the Florida PRIME landing page. At the top left is the Florida PRIME logo, and at the top right are links for "Prime Public Site" and "Log in". The main header area includes the text "Florida PRIME" and "An Investment Service for Public Funds", with a "Participant Login" button. Below this, the page is divided into two columns. The left column, titled "Fund Rates", lists several metrics: Net Asset Value (0.999876127), Market Value (\$11,440,394,583.18), Amortized Cost (\$11,441,811,918.35), 1-Day SEC Yield (1.56), 7-Day SEC Yield (1.55), and 30-Day SEC Yield (1.49). The right column, titled "Fund Holidays", contains a table of dates and corresponding holidays for 2018.

Date	Holiday
1/1/2018	New Year's Day
1/15/2018	Martin Luther King Day
2/19/2018	President's Day
3/30/2018	Good Friday
5/28/2018	Memorial Day
7/4/2018	Independence Day
9/3/2018	Labor Day
10/8/2018	Columbus Day

Figure 1

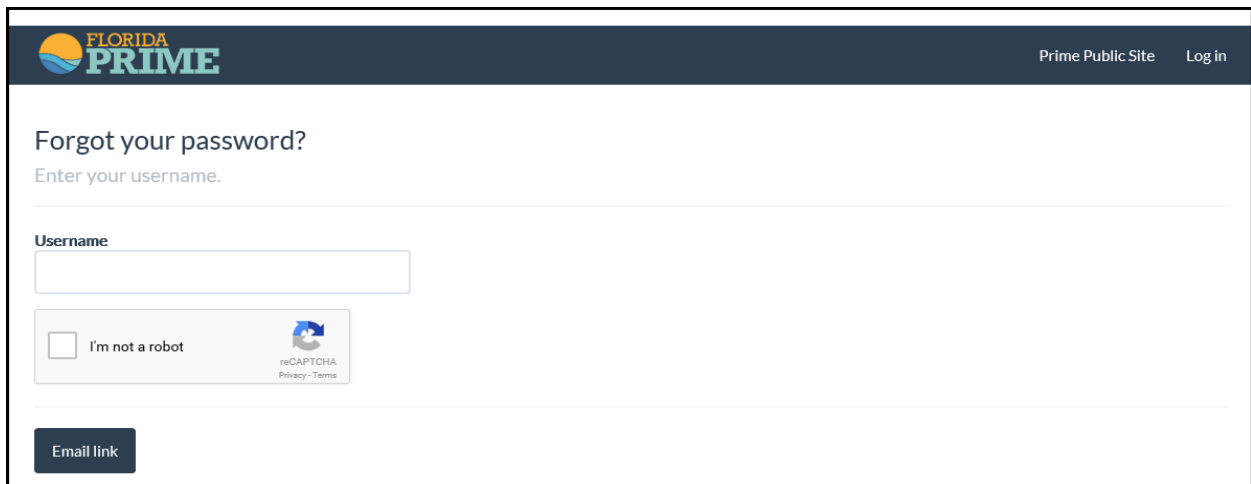
## Login & Forgot Password:

Provide email/username and password credentials for system access (Figure 2). If you have forgotten the password, click the 'Forgot your Password?' link located below the Log In button (Figure 2). The 'Forgot your Password' page displays with a request for the account email (Figure 3). With correct credentials, an email containing a link to change the password is sent. Clicking the link within the configured time limit of 60 minutes opens a page to allow a new password to be set (Figure 4). Existing password recovery is not available as a security feature. Passwords must be reset. After a successful password reset a confirmation page is displayed with a link back to the main Login page. (Figure 5).




The screenshot shows the Florida PRIME login page. At the top left is the Florida PRIME logo. At the top right are the links "Prime Public Site" and "Log in". The main heading is "Log in" with the instruction "Please supply your credentials." Below this are two input fields: "Email" and "Password". A reCAPTCHA widget is present with the text "I'm not a robot" and a checkbox. Below the reCAPTCHA is a "Log in" button and a link "Forgot your password?".

Figure 2 – Logging In



The screenshot shows the Florida PRIME forgot password page. At the top left is the Florida PRIME logo. At the top right are the links "Prime Public Site" and "Log in". The main heading is "Forgot your password?" with the instruction "Enter your username." Below this is a "Username" input field. A reCAPTCHA widget is present with the text "I'm not a robot" and a checkbox. Below the reCAPTCHA is an "Email link" button.

Figure 3 – Forgot password step 1

 Prime Public Site Log in

## Reset Password

Complete this form for immediate password change.

Passwords must be at least 8 characters in length, must contain at least one uppercase (A-Z), one digit (0-9), and one special character (!,@,#,\$,%,\*).

**Username**

**Password**

**Confirm password**



I'm not a robot  reCAPTCHA  
Privacy - Terms

Figure 4 – Forgot password step 2

 Prime Public Site Log in

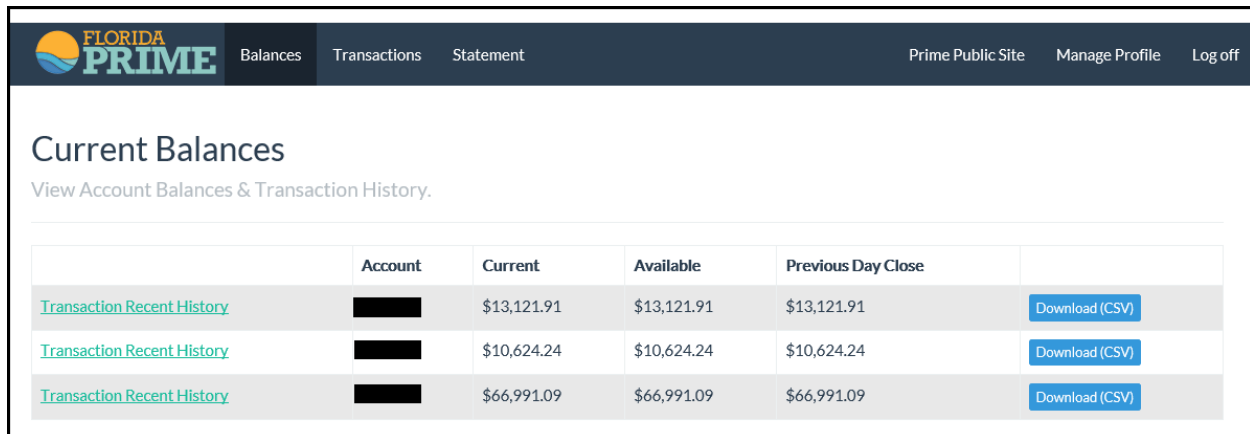
## Reset password confirmation.

Your password has been reset. Please [click here to log in](#)

Figure 5 - Password reset confirmation

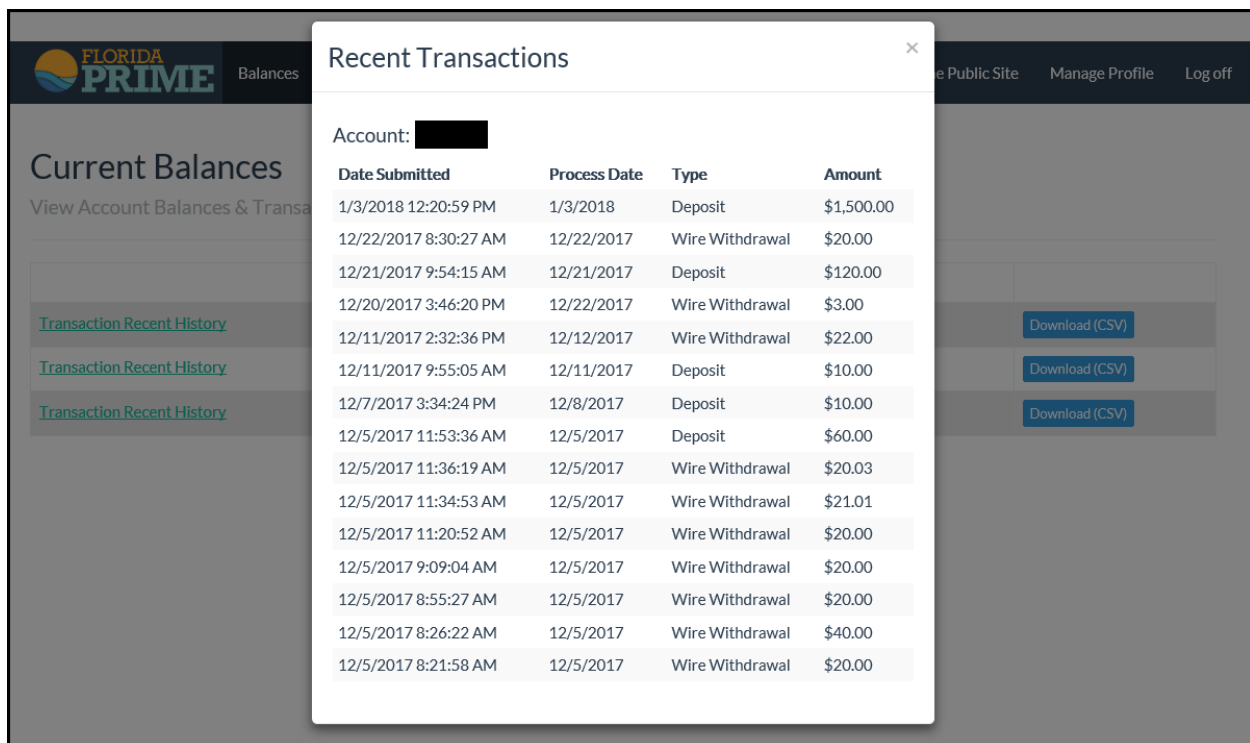
## Balances:

Upon successful Login, PRIME displays the balances page by default (Figure 6). The Balances page displays information about each account associated with the logged in user. In addition to account balances, clicking on the 'Transaction Recent History' for any account displays the last 15 transactions for that account (Figure 7). For additional transaction information, the blue 'Download (CSV)' button begins a download of the prior year's transactions in .CSV file format (Figure 8).



	Account	Current	Available	Previous Day Close	
<a href="#">Transaction Recent History</a>	██████	\$13,121.91	\$13,121.91	\$13,121.91	<a href="#">Download (CSV)</a>
<a href="#">Transaction Recent History</a>	██████	\$10,624.24	\$10,624.24	\$10,624.24	<a href="#">Download (CSV)</a>
<a href="#">Transaction Recent History</a>	██████	\$66,991.09	\$66,991.09	\$66,991.09	<a href="#">Download (CSV)</a>

Figure 6 - Balances default page



Date Submitted	Process Date	Type	Amount
1/3/2018 12:20:59 PM	1/3/2018	Deposit	\$1,500.00
12/22/2017 8:30:27 AM	12/22/2017	Wire Withdrawal	\$20.00
12/21/2017 9:54:15 AM	12/21/2017	Deposit	\$120.00
12/20/2017 3:46:20 PM	12/22/2017	Wire Withdrawal	\$3.00
12/11/2017 2:32:36 PM	12/12/2017	Wire Withdrawal	\$22.00
12/11/2017 9:55:05 AM	12/11/2017	Deposit	\$10.00
12/7/2017 3:34:24 PM	12/8/2017	Deposit	\$10.00
12/5/2017 11:53:36 AM	12/5/2017	Deposit	\$60.00
12/5/2017 11:36:19 AM	12/5/2017	Wire Withdrawal	\$20.03
12/5/2017 11:34:53 AM	12/5/2017	Wire Withdrawal	\$21.01
12/5/2017 11:20:52 AM	12/5/2017	Wire Withdrawal	\$20.00
12/5/2017 9:09:04 AM	12/5/2017	Wire Withdrawal	\$20.00
12/5/2017 8:55:27 AM	12/5/2017	Wire Withdrawal	\$20.00
12/5/2017 8:26:22 AM	12/5/2017	Wire Withdrawal	\$40.00
12/5/2017 8:21:58 AM	12/5/2017	Wire Withdrawal	\$20.00

Figure 7 - Recent transaction information by account

	Account	Current	Available	Previous Day Close	
<a href="#">Transaction Recent History</a>	██████	\$13,121.91	\$13,121.91	\$13,121.91	<a href="#">Download (CSV)</a>
<a href="#">Transaction Recent History</a>	██████	\$10,624.24	\$10,624.24	\$10,624.24	<a href="#">Download (CSV)</a>
<a href="#">Transaction Recent History</a>	██████	\$66,991.09	\$66,991.09	\$66,991.09	<a href="#">Download (CSV)</a>

Figure 8 - Full year transaction download

## Transactions:

To add a new transaction, choose the 'Transactions' link from the main navigation bar. The New Transaction page displays with a dropdown list of all accounts associated with the logged in user (Figure 9). Choose any account from the list to begin the transaction. A page will display showing pertinent information about the selected account such as Current and Available balance and account name (Figure 10). In addition, the transaction form displays requesting information about the transaction type, amount, and process date (Figure 10). If a transfer is selected as the transaction type, an additional input box will appear to type in the transfer to account.

Once the transaction details are added, click the 'Review' button to review all the details of the transaction (Figure 11). If satisfied, click the 'Submit' button to submit the transaction to the database. A confirmation page will display with details about the transaction, new account balances, and the transaction confirmation number (Figure 12).

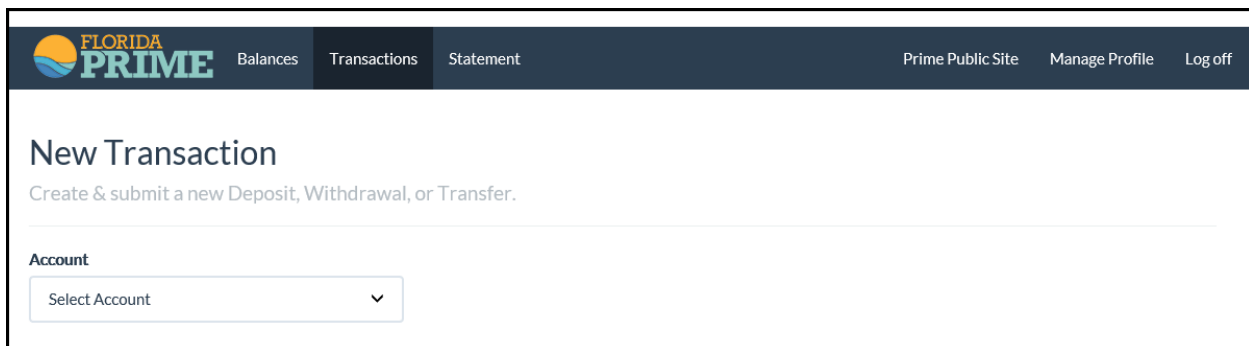


Figure 9 - Transaction default page

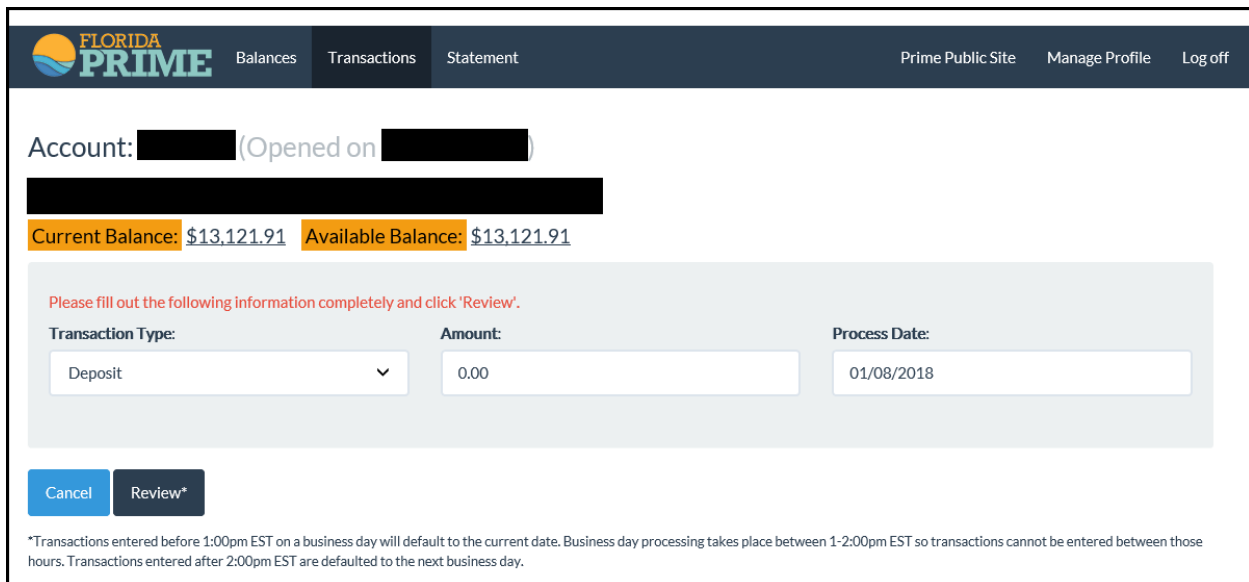


Figure 3 - Selected account details

FLORIDA PRIME Balances Transactions Statement Prime Public Site Manage Profile Log off

Current Balance: \$13,121.91 Available Balance: \$13,121.91

Review the transaction details. If they are correct click 'Submit'.

Account:	[REDACTED]
Type:	Deposit
Amount:	\$10.00
Initiated By:	[REDACTED]
Process Date:	01/08/2018

Cancel Submit

\*Transactions entered before 1:00pm EST on a business day will default to the current date. Business day processing takes place between 1-2:00pm EST so transactions cannot be entered between those hours. Transactions entered after 2:00pm EST are defaulted to the next business day.

Figure 4 - Transaction review page

FLORIDA PRIME Balances Transactions Statement Prime Public Site Manage Profile Log off

Transaction Receipt: Account [REDACTED]

Transaction submitted on 1/8/2018 at 8:31 AM

A **Deposit** in the amount of **\$10.00** was accepted. The process date for this transaction is **01/08/2018**

Please note your adjusted account balance(s)

Current: **\$13,131.91**  
Available: **\$13,131.91**

Transaction Confirmation: 01081800001

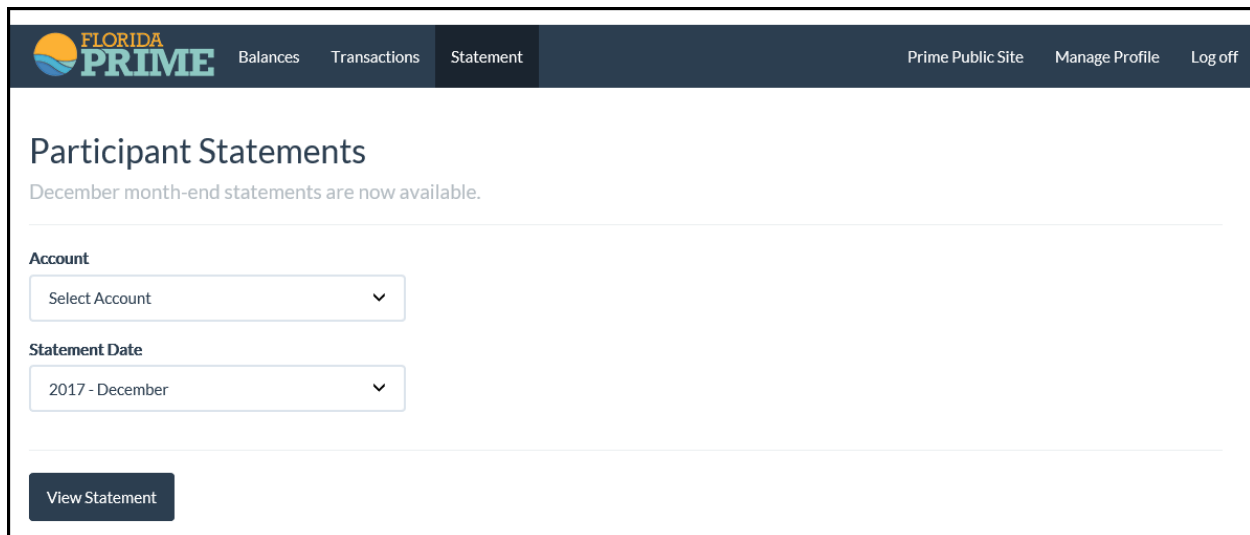
Add Another Transaction

Figure 5 - Transaction receipt and confirmation number



## Statements:

To run a PRIME statement choose an account and a statement date from the lists provided on the Statements default page (Figure 13). The statement will appear in a separate window. Please allow pop-ups in your browser of choice to avoid blocking of the statement report.



The screenshot shows the 'Participant Statements' page on the Florida PRIME website. The page has a dark blue header with the Florida PRIME logo on the left and navigation links for 'Balances', 'Transactions', 'Statement', 'Prime Public Site', 'Manage Profile', and 'Log off' on the right. The main content area is white and features the title 'Participant Statements' and a message: 'December month-end statements are now available.' Below this, there are two dropdown menus: 'Account' with the placeholder text 'Select Account' and 'Statement Date' with the selected value '2017 - December'. At the bottom left of the form area is a dark blue button labeled 'View Statement'.

Figure 6 - Run a statement

## Profile Management:

Choose the 'Manage Profile' link located on the navigation bar to see all profile options (Figure 14). Current profile management offerings include:

- Enabling or disabling of two-factor authentication (Figure 15)
- Changing the current password (Figure 16)
- Viewing and updating the 4 digit caller verification code (Figure 17)
- Modifying statement delivery method (paperless statements) (Figure 18)
- Download the PAMF template

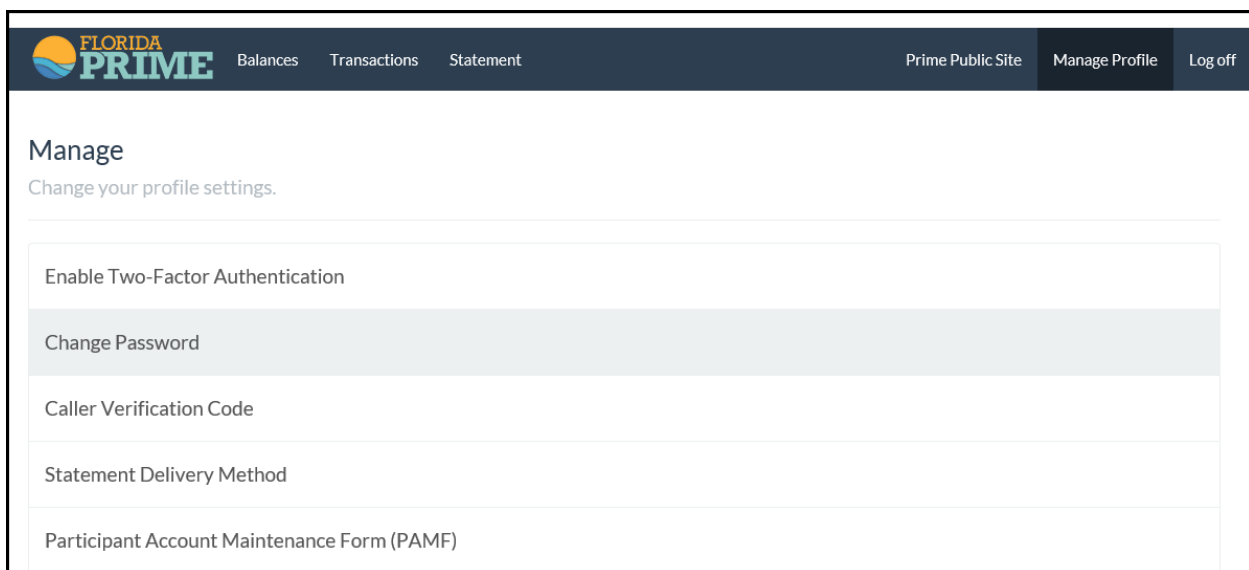


Figure 7 - Profile management options

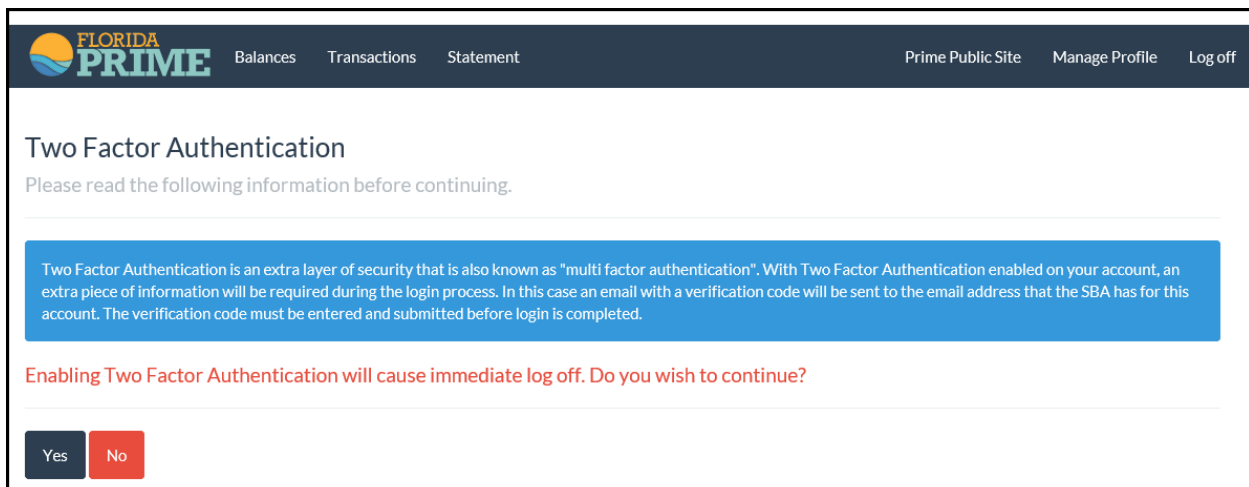


Figure 8 - two-factor authentication setup

The screenshot shows the Florida PRIME website header with navigation links: Balances, Transactions, Statement, Prime Public Site, Manage Profile, and Log off. The main content area is titled "Change Password" and includes the instruction "Complete this form for immediate password change." Below this are three input fields labeled "Current password", "New password", and "Confirm new password". At the bottom, there are two buttons: "Change password" and "Cancel".

Figure 9 - Change password form

The screenshot shows the Florida PRIME website header with navigation links: Balances, Transactions, Statement, Prime Public Site, Manage Profile, and Log off. The main content area is titled "Edit Caller Verification Code" and includes the instruction "Use the form below to view and edit your personal Caller Verification Code. The Caller Verification Code is used as a security measure when calling in transactions. The Caller Verification Code is not needed for transactions submitted through this site. Click the 'Submit' button when your changes are complete." Below this is a line of text stating "The current Caller Verification Code is" followed by a blacked-out code. There is an input field labeled "Enter new 4-digit Caller Verification Code". At the bottom, there are two buttons: "Submit" and "Cancel".

Figure 10 - View/update verification code



### Statement Delivery Method

View and/or change your current statement delivery preference for account [REDACTED]. If the checkbox is checked it means the selected account receives statements online only.

Please note that all authorized individuals on this account will be notified via email of any change to the statement delivery method.

Online Only Statements:

Last Updated On: 12/4/2017

Last Updated By: [REDACTED]

Figure 11 - Paperless statements option