

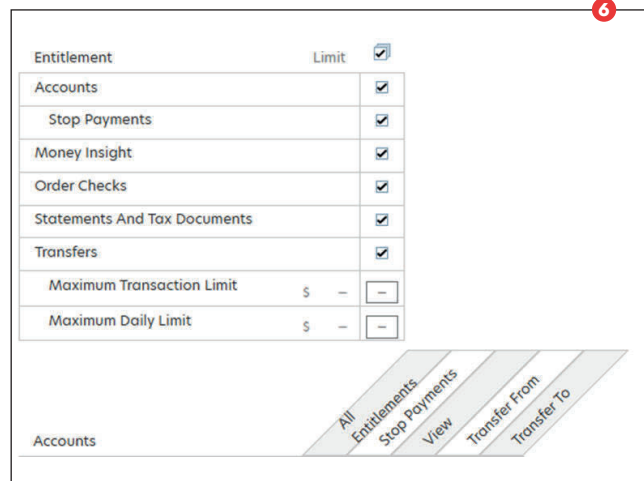
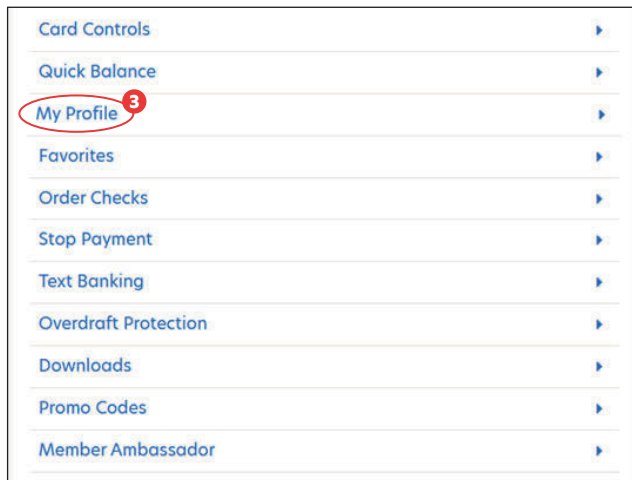
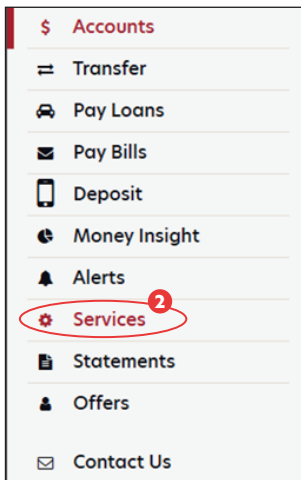
Personal Account: Additional User Set-up Guide

As part of the digital banking upgrade, your current additional user permissions on your personal account won't move over with the upgrade. You will need to set them up in the new platform.

Before the upgrade

To keep things easy, before your upgrade log in to your current digital banking account and make note of or screenshot your current additional user permissions.

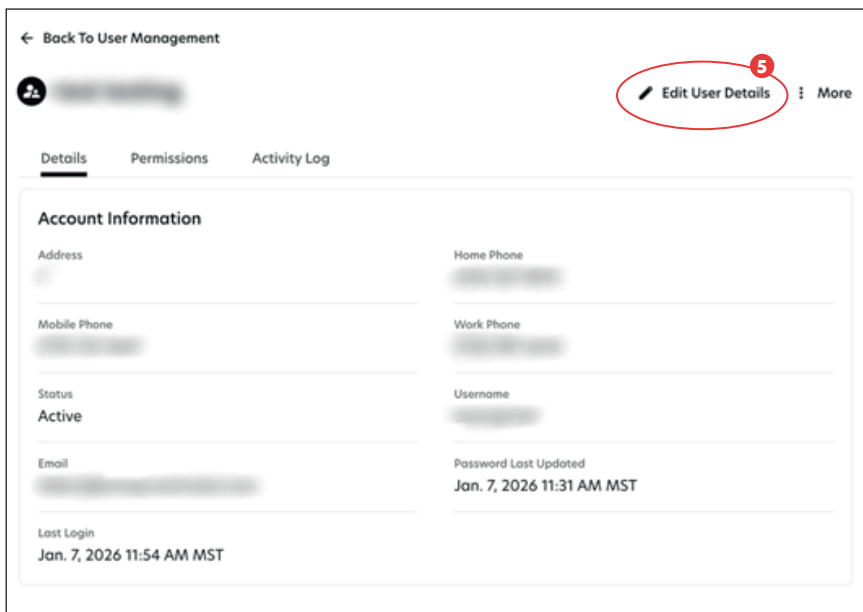
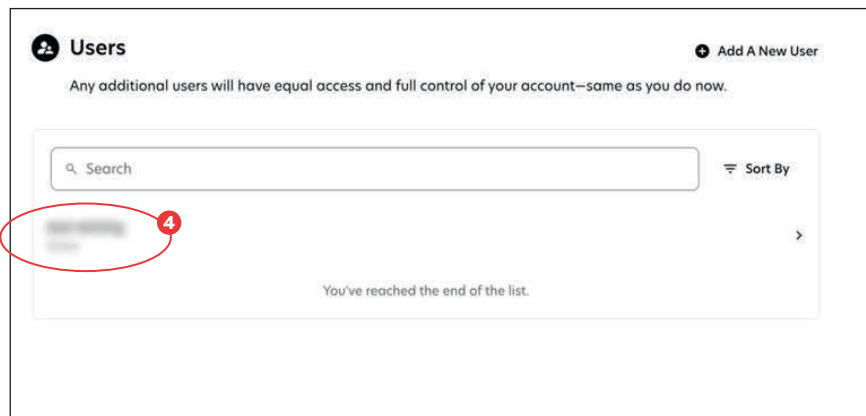
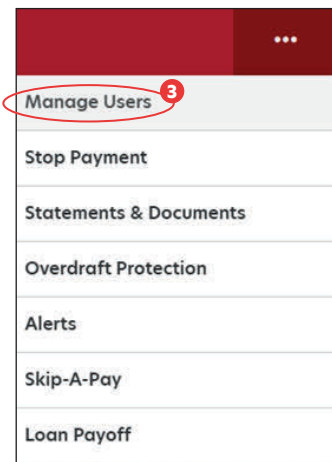
- 1 Log in to your current digital banking account with your current username and password
- 2 Under the Menu tab, select Services
- 3 Click on My Profile
- 4 Click Users
- 5 Choose a user and click the key icon under their name
- 6 Make note of or screenshot your current Entitlements (permissions) to make setting them up in the new platform easier.



Personal Account: Additional User Set-up Guide (continued)

After the upgrade, follow the steps below to set up permissions for your additional users.

- 1 Once the upgrade is live, log in to digital banking with your current username and password.
- 2 Go to the More menu. In the upper right, click on: **Mobile app users:** the three horizontal lines **Desktop users:** the three vertical dots
- 3 Select Manage Users
- 4 The additional users you previously set up in the old platform will be listed here. Select the user you want to set permissions for.
- 5 In Details, review and update the user's info as needed. Then select Permissions.



Personal Account: Additional User Set-up Guide (continued)

After the upgrade, follow the steps below to set up permissions for your additional users.

- 6 Scroll through and choose the access and actions you want this user to have.
- 7 Repeat these steps for each additional user.

← Back To User Management

24 [User Name] Edit User Details More

Details **Permissions** Activity Log

Accounts

Permitting accounts allows users to view balances and transactions, export transactions and create reports using allocated accounts. Roles entitled to checking accounts and Check or ACH Stop Payments permissions enables users to submit stop requests.

Account Access

Select All 10 of 10
When All Accounts is checked, users are automatically permitted to new accounts.

Deposits

- Primary Savings
- No Strings Checking
- No Strings Checking
- 11 Month Certificate
- 12 Month Certificate
- Money Market Savings

Loans *

- TEST MORTGAGE
- 2023 Hyundai Palisade

Stop Payments

- Check Stop Payments
- ACH Stop Payments
- Stop Payments History

This user has the ability to:

- View Statements and Documents
- Mobile Check Deposit
- Pay Bills in Bill Center
- Manage External Accounts
- Manage Member to Member Accounts

Transfer Permissions

Allow users to transfer funds to and from internal accounts. Use the Transfer To and Transfer From permissions to control how users can move funds between accounts.

Transfers To

Select All 11 of 11

Deposits

- Primary Savings
- No Strings Checking
- No Strings Checking
- Money Market Savings

Loans *5167

- TEST MORTGAGE
- 2023 Hyundai Palisade
- [Redacted]
- Life Happens Personal Loan

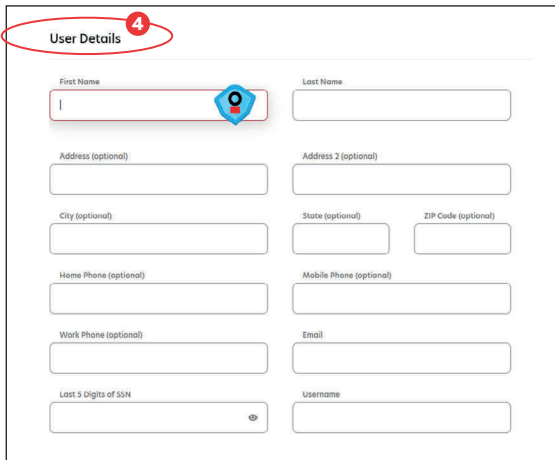
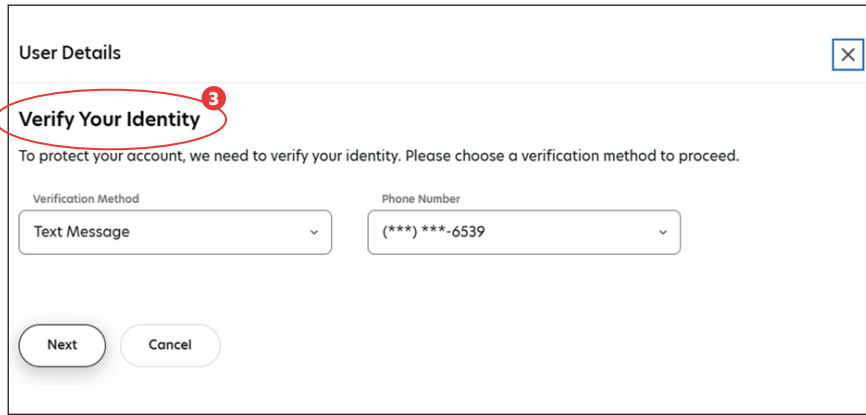
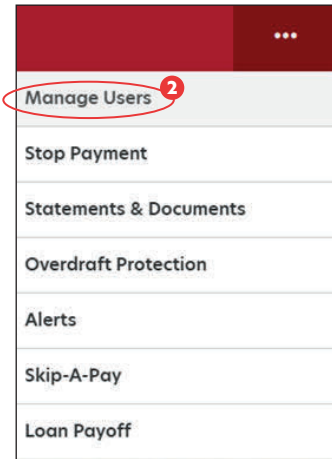
Debit & Credit Cards

- Request New Card
- Report Lost/Stolen Card
- Advanced Card Controls
- Change Debit Card PIN
- Activate Card
- Add New Authorized User
- View Card Details

Personal Account: Additional User Set-up Guide (continued)

If you need to add a new user who is not already included in your additional user list, follow the steps below.

- 1 Go to the More menu. In the upper right, click on: **Mobile app users:** the three horizontal lines **Desktop users:** the three vertical dots
- 2 Select Manage Users
- 3 Follow the Verify Your Identity process.
- 4 Under User Details, fill in all mandatory info. Important: If you want to use multi-factor authentication, you must fill in the Mobile Phone (optional) field.



Personal Account: Additional User Set-up Guide (continued)

If you need to add a new user who is not already included in your additional user list, follow the steps below.

- 5 Select User Permissions. **NOTE:** Because all User Permissions are preselected, **you must un-select** those you do NOT want your user to have.
- 6 Review and confirm the User Permissions.
- 7 The new additional user will receive an email with a temporary password and will have 24 hours to create their new password. After 24 hours, the temporary password will expire and the account owner will need to help the new user reset their password.

← User Permissions 5

Accounts

Permitting accounts allows users to view balances and transactions, export transactions and create reports using allocated accounts. Roles entitled to checking accounts and Check or ACH Stop Payments permissions enables users to submit stop requests.

- Account Access

Stop Payments 5

Check Stop Payments ACH Stop Payments Stop Payments History

This user has the ability to:

View Statements and Documents Mobile Check Deposit

Pay Bills in Bill Center Manage External Accounts

Manage Member to Member Accounts

Transfer Permissions 5

Allow users to transfer funds to and from internal accounts. Use the Transfer To and Transfer From permissions to control how users can move funds between accounts.

- Transfers To

Select All 25 of 25

🔍 Search

New User Added 7 ×

██████████ has been added as a new user. This user has been sent a temporary password that will expire in 24 hours.

← Review 6

First Name: ██████████

Last Name: ██████████

Mobile Phone: (██████████) ██████████-██████████

Email: ██████████@██████████.com

Username: ██████████