

Assigning a Delegate – Member Guide

Where a business would like to give online access to a person who is not a signor on the accounts (i.e. accountant, bookkeeper, etc), they can assign a separate delegate login to this person.

This process is completed by the member, not the Credit Union.

There are 2 types of delegates:

- Initiator Delegates:
 - Can view accounts
 - Can set-up transactions (bill payments, transfers, etc)
 - Can view e-statements

All transactions initiated by these delegates must be approved by the applicable number of signers

- Read-Only Delegates:
 - Can only view activity in the accounts you give them access to

Steps to grant someone delegate access:

- 1) Log into online banking using your login ID and PAC
- 2) On the left hand menu, click Business Services
- 3) Click “Add/Modify a Delegate” from the expanded Business Services Menu

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My Accounts

Payments

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Business Services

Manage Consolidated Accounts

Add/Modify Delegates ⓘ

View Transaction History

Account Services

Messages and Alerts

Profile and Preferences

Delegate Manager

[Add Delegate](#) (0/3)

A delegate is a user with limited access to account functions. You can add up to 3 delegates.

Delegate	Delegate Status
No delegates have been added.	

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Each signor of the business can assign up to 3 delegates each.

Add Delegate

A delegate is a user authorized by a signing officer to have limited access to account functions as defined in the Direct Services Agreement. Please enter the following information for your delegate and click **Submit**.

Personal Information

- * **Access Level** Read-only - View accounts only
 Initiator - View accounts and initiate transactions

* **Temporary Password**

* **Confirm Password**

* **First Name**

Initial

* **Last Name**

Notes

Contact Method

Please enter a business phone number for SMS text, a business email address, or both for a login notification to be sent to your delegate. A text message and/or email containing login information will be sent to your delegate.

Phone Number

Please re-enter phone number

Carrier (* required if phone number entered above)

Email Address

Please re-enter email address

I confirm that I have obtained express consent from the delegate named above for the collection, use, and disclosure of the delegate's phone number and/or email address, as applicable, in connection with this login notification.

- 4) Enter and select the required information for the delegate. The signor must assign a temporary password, which the delegate will be required to change upon first login.

- 5) The **Accounts Shared with a Delegate** section is will show the debit card number. The signor will click the checkbox beside “Share Accounts under this MemberCard?” for the appropriate membership. If the signor has their personal membership accounts consolidated with this login, the membership will appear here. If the signor does not want the personal membership to be viewable to the delegate, the checkbox should be left blank.

****Note:** accounts are all shared at the login level. Thus, when giving access to the delegate, the signor will not be able to select only some accounts and exclude others

Accounts Shared with Delegate

Please select at least one member card to share with this delegate.

Note:

The delegate will have access to all memberships under a selected MemberCard, including any personal ones. [Contact us](#) if you would like to separate your memberships.

MemberCard 5821630 [REDACTED]
Test Noventis
Share accounts under this MemberCard?

Membership: [REDACTED]

Account Name	Balance
Basic Ag Chq	\$5.00
Essential Sav	\$10.00

MemberCard 5821630 [REDACTED]
Sally Test
Share accounts under this MemberCard?

Membership: [REDACTED]

Account Name	Balance
test account 1	\$2.00
test capital share	\$0.00

| [Cancel](#)

- 6) Once assigned, you will see the following receipt. The delegate is automatically assigned a “Member Number” which will start with “D”. They will use this as their “Member Card” number when logging into Online Banking.

Add Delegate - Receipt

Username	Date
	Thursday, May 14, 2020
✓ Status:	Created
Member Number:	D1307384
Delegate Status:	Active, Account Unlocked
Access Level:	Initiator
Password:	*****
First Name:	
Initial:	
Last Name:	
Notes:	
Phone Number:	
Carrier:	
Email Address:	@noventis.ca
Accounts Shared with Delegate:	Membership 000-0 Membership 000000000000 • Noventis Rewards Fee Free

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A message containing login information was sent to the delegate using the email address and/or phone number provided.

7) The delegate will receive this login information using the email address and/or phone number provided. For security purposes, they will receive the temporary password for this login in a separate message, 15 minutes later.

Once assigned, the signor will have the ability to update the following information about the delegate:

- Status (active or inactive)
- Access level (Read-only or Initiator)
- First, middle and last name
- Notes regarding the delegate
- Password – assign a new password to the delegate

***Note:** In a multiple signor environment, signors can see the delegates created by other signors and delete them. However, signors *cannot* edit the profiles of delegates created by other users.