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)
 - o Can view e-statements

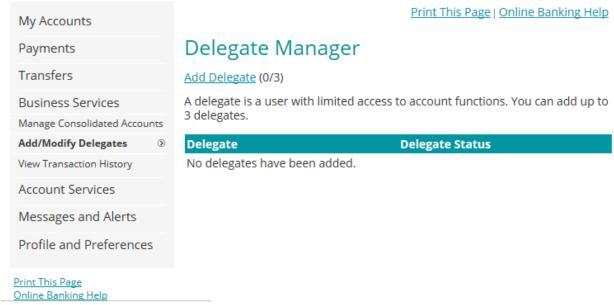
All transactions initiated by these delegates must be approved by the applicable number of signers

- Read-Only Delegates:
 - o 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

<u>Home</u> > <u>Business & Agriculture</u> > <u>Online Banking</u> > <u>Business Services</u> > **Add/Modify Delegates**



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	O Read-only - View accounts only
	O Initiator - View accounts and initiate transactions
* Temporary Password	
* Confirm Password	
* First Name	
Initial	
* Last Name	
Notes	
Contact Method	
	hone number for SMS text, a business email address,
or both for a login notific	ation to be sent to your delegate. A text message ogin information will be sent to your delegate.
Phone Number	
Please re-enter phone number	
Carrier (* required if	Select a Carrier ∨
phone number entered above)	
Email Address	
Please re-enter email address	
named above for the	obtained express consent from the delegate collection, use, and disclosure of the observable, in ogin 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.

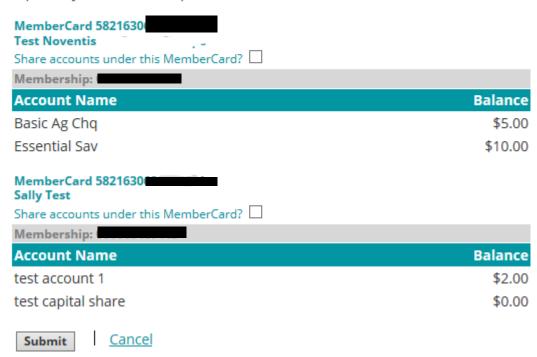
****Note:** accounts are all shared at the login level. Thus, when giving access to the delegate, the signor will not be able to select only some accounts and exclude others

Accounts Shared with Delegate

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

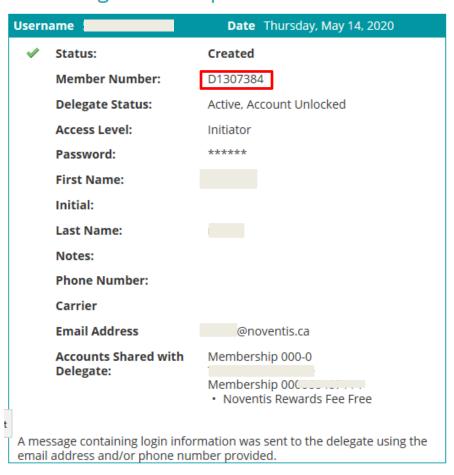
Note:

The delegate will have access to all memberships under a selected MemberCard, including any personal ones. <u>Contact us</u> if you would like to separate your memberships.



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



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.