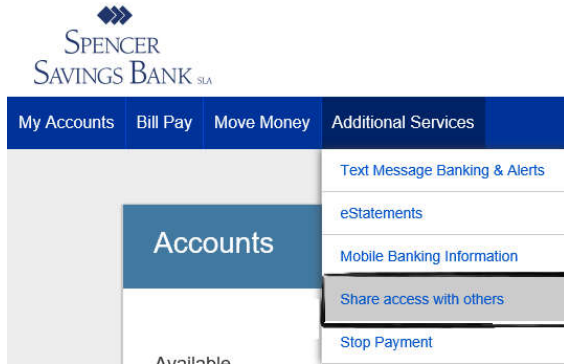


## How to Create a Shared Access User for Online Banking

1. The account owner or administrator signs into the online banking with their credentials on the desktop version of our website. **This process cannot be conducted on the app.**
2. Once signed in, select **Additional Services**, then **Share access with others** from the drop down menu.



3. In the new screen, select **+Add Person**.

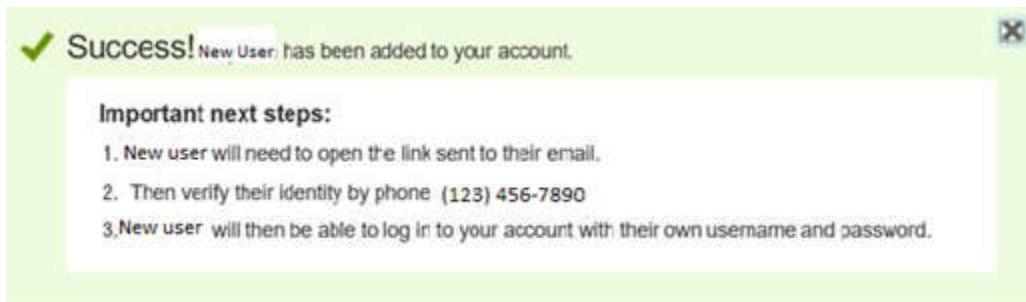
A screenshot of the 'Account Access' form. The title 'Account Access' is in bold. Below it, the text 'People with access to my account' is followed by a horizontal line. At the bottom right, there is a blue button with a white plus sign and the text '+ Add person'.

4. Enter **First & Last Name**, **Phone Number**, and **Email Address** of the individual you are giving the shared access to.
5. Select which account(s) you would like to give access to. You can have them **View only**, **Make internal transfers**, or **Make bill payments**. There are no account limits for internal transfers. For bill payments, you can set a maximum amount per transaction that will need your approval.

A screenshot of the 'Share Account Access' form. The title 'Share Account Access' is in bold. Below it, the question 'Who can access my accounts?' is followed by a horizontal line. There are five input fields: 'First name', 'Middle name (optional)', 'Last name', 'Phone number', and 'Enter email address'. Below this, the question 'What accounts can they access?' is followed by a horizontal line and a blue link 'Grant full access to all accounts'. There are three radio button options: 'View only', 'Make internal transfers' (with the text 'No amount limitations' to its right), and 'Make bill payments' (with the text 'Set amount in which a bill pay payment will need an approval' to its right). The 'Make bill payments' option is highlighted with a blue dashed border.

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6. Select **Save**, on the bottom right.
7. If done correctly, the "Success" message below will appear:



8. Two separate emails will be sent to the shared access user to the e-mail provided; one with a system-generated username and the other one with the temporary password, which is good for 30 minutes only. *If the time expires the primary user will have to reset the shared access user.*
9. When the shared access user signs into the online banking for the first time, they have to agree to our terms and conditions prior to gaining account access.
10. Then, the shared access user will be prompted to receive a verification code; a **phone call** is the only option until the new shared user signs into the online banking and adds the text message notification.
11. Next, the shared access user will be prompted to change their password.
  - Password Guidelines: minimum length: 6, maximum length: 32, and use a mixture of letters, numbers, or special characters: ! @ # \$ % ^ & \* \_ + - = ( ) { } | : ; ' , . / ?

When signed into the online banking, the shared access user will be able to change their system generated username by going into the **My Settings** option on the top right on the screen. Next, click **Edit** under **Login & Security**.

**\*\*Below is how it will look once the shared user has been added.\*\***

