

Digital Banking Frequently Asked Questions

Transfers/Transactions

How do I make a transfer between my accounts in digital banking?

To transfer between your credit union accounts in digital banking:

- Log In
- Click Move Money > Transfers > Make a Transfer online **or** tap the slideout menu > Transfer > Make a Transfer in the mobile app
- Select your To and From account and amount
- Click More Options to change the frequency and date if desired
- Click Submit

Where can I view pending transactions on my account?

- Log in
- Select the account you are needing to view
- To view all account activity, view the Activity tile **or** Transactions in the mobile app

How do I search for transactions in digital banking?

Account transactions can be searched in digital banking by amount, date, tags, etc.

Online:

- Log in
- Click **Accounts**
- In the Accounts section, select the account you would like to search
- In the Activity section, select the magnifying glass icon
- Click on the Search and sorting options to open **Advanced Search** in digital banking
- On the Advanced Search window, you can select specific search filters and select **Search**

Mobile app:

- Log in
- Select your account you want to search
- Select Transactions
- Tap the magnifying glass icon



- Tap the  icon to use Advanced Search options

How do I add a tag, note, or image to a transaction in digital banking?


You can add notes, tags, and images to any transaction inside of digital banking. To begin:

- Log in
- Click on any account
- Click on Transactions (in mobile)
- Select the Transaction you wish to edit and pull up the transaction's details page
- Click on the appropriate icon for one of the following:
 - Add Tags
 - Add Notes
 - Add Images
- Follow the on-screen prompts to update the transactions
- Close the transaction detail page or tap < Transactions in mobile

Any tags, notes, and images attached to transactions will be accessible on all devices when you log in to digital banking in the future.

How do I download transactions in digital banking?

Account transactions can only be downloaded in digital banking (excluding the app).

- Log In
- Click **Accounts**
- In the Accounts section, select the account you like to download transactions for.
- In the Activity area, select the first icon  next to the print and search icon.
- On the **Download Activity** window, select the **Date range** and **File Type** and click **Download**.

How do I print transactions in digital banking?

Account transactions can only be printed in online banking.

- Log In
- Click the Accounts tab
- In the Accounts section, select the account
- On the Activity section, select the printer icon. Only transactions that show in the Activity section will print.
- A print screen appears with a print preview and print configuration options.
- Using the dialog, configure the print settings and select Print.

Bill Pay

What is Bill Pay?

Bill Pay allows you to pay anyone, anywhere right from your computer or mobile phone. There is no limit to the number of bills you can pay, and this service is free to all members with a checking account. Bill Pay is offered through digital banking.

How do I pay a bill in digital banking?

You can use digital banking to pay a bill or pay a person.

- Log in
- Select Move Money > Payments or Tap Pay under your account in mobile
- If it is your first-time using Payments, it will ask you to enroll, click Enroll
- Select Pay a bill or Pay a person (online only)
- Select the merchant or person you would like to pay
- Select an account to take funds from, and then input the Amount
- If you would like to set the date for the payment, Select More options and select the desired date
- Select Submit

Troubleshooting

Why am I getting the digital banking error: "Your account needs attention"?

This error is present during the log in process and typically means that your account has been locked. This can happen for a variety of reasons but is easily resolved. Please contact us via phone or chat for assistance unlocking your account.

Why am I getting the digital banking error: "Please verify your information and try again"?

This error is present during the log in process and typically means that your credentials didn't match our records. Try entering your credentials one more time. If the error persists, please contact us via phone for further assistance.

Why am I getting the digital banking error: "Oops: The information you provided doesn't match what we have on file."?

This error is present during the log in process and typically means that your account information does not match our records. Please contact us via phone or chat to confirm we have the correct phone number and username on record.

I'm not able to log in to online banking when I click on the login button

You need to clear your cache in Chrome to remove all cookies. If you need further assistance, please contact us.

[Why am I getting the digital banking error: "Incorrect phone number"?](#)

This error is present during the enrollment process and means that the phone number you entered does not match the phone number we have on file. If you have an alternative phone number, you can try again. If you would like to update your phone number in our system or need other assistance, please contact us.

[Why am I getting the digital banking error: "Does not meet username or password requirements"?](#)

This error is present during the enrollment process or when updating credentials. Click on Show Rules below the username and password field to see the credential requirements.

[Why am I getting the digital banking error: "It looks like you've already enrolled"?](#)

This error is present during the log in process and typically means that our records show that you have previously created an account with us. If you forgot your username and password, on the log in page click Forgot? Follow the steps to recover your account.

[I can't remember my username name or password](#)

You can recover your account by going through the Forgot Password? steps.

Messages

[How do I send a message in digital banking?](#)

Whatever device you are on, it's easy for you to start a secure conversation with the credit union:

- Log in to digital banking via the **Login** button on the website or via the mobile app.
- From a desktop, click on the **envelope icon** in the upper right-hand corner of digital banking or select **Conversation** from the dashboard of mobile banking.
- Click **Start a conversation** or click the conversation icon on mobile.
- Type your message and click **Send**.

A member service consultant will respond shortly.

Transacting with another Financial Institution

[How do I add an account from another financial institution to my digital banking?](#)

You are able to add accounts from other financial institutions inside your digital banking. This will provide you with a display of that account but will not allow you to perform any transactions.

To begin:

- Log In and navigate to the Accounts section
- Select Connect Institution in the right menu **or** tap the + in the top right corner in mobile and select Connect Institution
- Search for or select your financial institution from the list
- Sign on to the financial institution with your username and password

[How do I set up a new transfer to or from another institution?](#)

You can make transfers between your credit union accounts and other financial institutions once an external account has been verified.


To add an external account:

To set up an external transfer on a desktop:

- Log in to Digital Banking
- Click on **Move Money**
- Click **Transfers**
- Click **+External Account** to set up a new linked account
- Confirm a deposit amount into your other financial institution
- Finally, schedule a new one-time or recurring transfer

To set up an external transfer on the app:



- Log in and click 
- Click **Settings**
- Click **External Account** to set up a new linked account
- Confirm a deposit amount into your other financial institution
- Finally, schedule a new one-time or recurring transfer

Please note: Transfers to another financial institution may take 3-5 business days to process.

Alerts

[Will my previously created account alerts work in the new digital banking system?](#)

Alerts will need to be re-entered in the new system. To set up alerts in digital banking:

1. Log in
2. Select the account you would like to set up an alert for
3. Click Alert preferences in the menu or Manage alerts in mobile
4. In the Balance alerts section, select Add alert.
5. Select Above or Below, and then input a dollar amount.
6. In the Alert/Notify by field, select Email, Text message, or In-app message.
7. Select Add Alert to save the alert
8. Repeat steps for Transaction alerts

How do I delete an alert in digital banking?

Alerts can be deleted at any time in digital banking.

- Log in
- Select the account you would like to edit up an alert for
- Click Alert preferences in the menu or Manage alerts in mobile
- Under Alerts
 - a. Click Edit next the alert you would like to change
 - b. Click the Trashcan icon or click Remove in mobile

How do I edit an existing alert in digital banking?

Alerts can be edited at any time in digital banking.

- Log in
- Select the account you would like to edit an alert for
- Click Alert preferences in the menu or Manage alerts in mobile
- Under Alerts
 - a. Click Edit next the alert you would like to change
 - b. Change your criteria for the alert
 - c. Click Save

eStatements

How do I view my account statements and tax documents in digital banking?

Account statements and tax documents can be downloaded from digital banking. These are only available for accounts already enrolled in eStatements.

- Log In
- Click on any account listed
- Click on Documents from the Account Details page in the options menu
- Statements and Taxes will be listed for each year available

Remote Deposits

How do I make a mobile deposit in digital banking?

Mobile deposit is available for all checking accounts, but you must enroll first. Mobile deposit can only be done through the mobile app.

- Log in
- Select Deposit under your checking account OR select Deposit Check from the slideout menu in the mobile app
- Click Enroll Account and go through the sign-up steps
- Once your request has been processed and approved, tap Deposit a Check
- Enter the check amount

- Tap Continue
- Select the account to deposit to
- Take a picture of the front of the check and tap continue
- Take a picture of the back of the check and tap continue
- Verify the information and tap Submit

[Are there limits on the dollar amount and number of mobile deposits I can submit?](#)

Mobile deposit limits are based on the type of checking account you have. These limits include a daily dollar amount and number of items deposited daily. If you have specific questions, come in or call the credit union.

[What should I do with my checks after using mobile deposit?](#)

You should retain the check for seven days after the deposit has posted to your account. After that time, you may shred it.

Card Management

[How do I block my debit card in digital banking?](#)

Blocking your debit card is easy in digital banking. It's just as easy to unblock it as well!

- Log in
- Under the Card Management tile, click the toggle slider to turn the desired card off
- If you wish to turn the card back on, simply click the toggle next to the blocked card to turn it on

Reorder Checks

[How do I re-order checks in digital banking?](#)

Checks can be re-ordered through digital banking.

- Log in
- On the dashboard click on your checking account from the account list
- On the account details page, from the options section click on the Reorder checks link

Updating Information

[How can I change my phone number, email address, or primary address in digital banking?](#)

You can update your phone number, email address, or primary address in digital banking.

- Log In
- Click on the User Profile icon and click Settings
- Click Edit next to your phone, email, or address
- Verify your password

- Edit your contact information
- Click Save
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Phone and email updates will happen immediately. All address updates will be reviewed by a member service representative and you may be contacted for additional information.

[How do I change my username or password in digital banking?](#)

You can change your username or password at any time in digital banking.

To change username:

- Log in
- Select your username icon in the top right corner or menu in mobile banking
- Select Settings and then select Security option on the left side menu
- In the Username field select Edit
- Enter your current password when prompted
- Change your username and select Save

To change password:

- Log in
- Select your username icon in the top right corner or menu in mobile banking
- Select Settings and then select Security option on the left side menu
- In the Password field select Edit
- Enter your existing password, and then enter a new password
- Select Save

[How do I rename or personalize an account name in digital banking?](#)

You can rename any account in digital banking.

- Log in
- Select an account from the Accounts section
- Select Settings from the options menu
- Next to the account name, select Rename
- Type the new name, and then select Save

[How do I change the order my accounts are displayed in digital banking?](#)

You can rearrange the order your accounts display in digital banking to reflect the sequence you want.

- Log In
- From the Accounts click on the three dots and click Organize Accounts in online or click the opposing arrows in mobile
- Drag and drop the accounts to rearrange the order
- Click Done

[Using Quicken or QuickBooks](#)

What do I have to do to update Quicken, QuickBooks and Mint after the digital banking update?

For the first time logging in to Quicken, QuickBooks or Mint after the digital banking update, you will need to reconnect all accounts in order to reactivate your feed. You will need to do the following actions on Quicken:

- Log in to the new online banking system first to verify access and set up Two-Factor Authentication
- Log in to your Quicken software
- **Always take a back-up of your software before performing any new action**
- Find the account you wish to update
- Click the Actions option on the account
- Click Edit Account details
- Select Online Services and Reset Account or Deactivate/Reactivate account
- Ensure that you are using Express Web Connect option (Direct Connect is not supported)
- Insert your username and password
- Select how you would like to receive your one-time passcode
- Complete the setup and review your transactions

You may have to perform this action for each share on your account in order for all of them to link. QuickBooks and Mint follow the same process but have varying on screen prompts.

Misc. Online

Which Internet browsers can I use to access my accounts online?

Recommended browsers (current major release):

- Microsoft Edge
- Firefox
- Safari
- Chrome

Note: Microsoft no longer supports Internet Explorer versions older than 11.0, and security updates are not available. Please download one of the browsers listed above. Safari versions below 10.1.2 are not compatible with the initial log in process. To complete the initial log in process, upgrade to the latest version of Safari, or use Chrome or Firefox.

The following types of browsers and tools are not recommended for use with digital banking:

- Beta versions
- Embedded browsers within Personal or Commercial Financial Management Software

How do I log out of digital banking?


When accessing on a browser, click on your name at the top right-hand corner of the screen and select "Sign Out". You will be taken to our website homepage and your session will be closed.

What is the inactivity time-out period for digital banking?

For your security your account will time-out after 10 minutes of inactivity.

Misc. Mobile

How do I change my profile photo in mobile banking?

1. Tap the slideout menu, and then select **Settings**.
2. On the Profile screen, select the pencil  next to the end-user profile image.
3. Choose to use an existing photo or use the device's camera to take a new photo.
4. On the Move and scale screen, adjust the photo placement within the frame as desired.
5. Select Done.

How do I log out of the mobile app?

When you are using the mobile app, there is not a log out button to push. You can exit the app by going to a different app or your home screen. Each time you navigate away from the app, your active session is ended, which serves the function of a log out button. When you navigate back to the app, you will be asked to re-authenticate, and if you have quick access features such as FaceID, TouchID, or passcode log on, you can gain access quickly each time.

If you want to remove the connection between your device and your account altogether, you can go to the Menu > Settings > Remove Profile. This will remove all association between your account and the mobile device and app you are using. Each time you attempt to access the app after this, you will have to put in the full username, password, and 2-Factor authentication to authorize your account on that device.

What minimum software versions are required for the mobile app?

The Apple mobile app requires a minimum version of iOS 11. The Android mobile app requires a minimum version of Android 5.0.

How do I set up Touch ID for iOS?

1. Tap the slideout menu and select Settings.
2. Tap Security in the menu.
3. Tap the toggle next to Touch ID.
4. Select Enable Touch ID.

Can I customize my mobile banking dashboard on multiple devices?

Yes, you can! You can customize a unique Dashboard set up for each of your devices