

## Post System Upgrade – Online & Mobile Banking FAQs

### Q. What does your new “person-centric” computer system refer to?

A. The new system focuses on **you**, not one specific account, so you’ll now see all accounts you are an owner of or a signer on in Online and Mobile Banking with one login. This benefit of “person-centric” also applies to assisting you in our Member Services Branches and on the phone. We can now view your entire relationship with us instead of one account at a time, which will ultimately mean faster transaction assistance.

### Q. I have two accounts, one personal and one business. When I log in, it now shows both. Does that mean my wife can now see both as well?

A. She can only see both if you have listed her as a signer or joint owner on both. Signers are also considered “co-owners” on accounts and therefore entitled to access. If you would like to make changes to your co-signers, please call us at (707) 445-8801 or stop by one of our Member Services Branches.

### Q. There are too many accounts shown on my screen now. Can I get some of them removed?

A. You can easily “hide” certain accounts within Online or Mobile Banking;

- On your phone: settings>account preferences>disable “visible” or
- On your desktop computer: settings>account preferences>use on/off toggle switches for viewing each of your accounts.

Note: This is also where you can set account nicknames.

### Q. I now realize that my ex-wife needs to be removed from some of my accounts. How?

A. We can help you close out those accounts and start fresh in just your name or any other modifications you’d like to make. Please contact our Member Support Center at (707) 445-8801 for assistance.

### Q. Why did my daughter’s youth account suddenly show up when I logged into Online Banking? I thought minors couldn’t use Online Banking?

A. Since you are a signer on her account and the system now focuses on you as a member (as opposed to a specific account), that account is now displayed in your summary, along with the rest of your accounts. Minors should typically not have access to digital services.

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**Q. I'm a business owner with multiple accounts. When one of my employees logs into Online Banking with our business login, he can now see all accounts linked to the business, even those he's not a signer on. How can I get that changed?**

**A.** There are a few options:

- You can have your employee only use his personal account login to access certain business accounts that he is a joint owner of or signer on. This prevents him from seeing the other business accounts that he is not authorized to see or
- You can easily “hide” certain accounts within Online or Mobile Banking;
  - On your phone: settings>account preferences>disable “visible” or
  - On your desktop computer: settings>account preferences>use on/off toggle switches for viewing each of your accounts orNote: This is also where you can set account nicknames.
- You can contact us at (707) 445-8801 or stop by any Member Services Branch to adjust the signers on your accounts.

**Q. I don't like the order in which my accounts are displayed. Can it be changed?**

**A.** In the account display page you can easily use “drag and drop” to move accounts around the home page to display in the order that you prefer.

**Q. Do joint account holders need to enroll in Online or Mobile Banking if they're already listed as a signer on an account?**

**A.** Yes. Joint account holders who would like to use our digital services need to enroll and create their own unique log in. Additionally, if a joint account holder already participated in Online or Mobile Banking with you, they must re-enroll now using a different login.

**Q. What are some the benefits of this change?**

**A.** Here are just a few:

- It gives us and you an entire view of our full relationship, including all accounts and services you use, enabling us to assist you faster at the line in our locations and on the phone.
- You can now access all your accounts via one login in Online or Mobile Banking instead of separate logins for each member number, meaning a more efficient experience.
- Joint account holders can now have their own login, so no shared logins, helping to ensure account security.

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