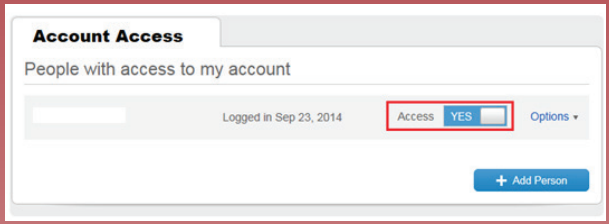
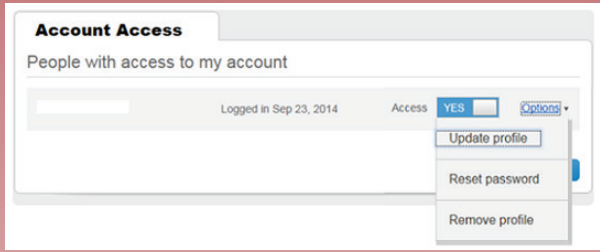
## Managing Shared Access

If at any point you would like to revoke shared access, just log in to NEFCUOnline and click on **Additional Services** > **Share Access with Others**. Slide button to **No** to disable a subuser.




By clicking on **Options**, you can also update a subuser's profile, reset their password, or remove profile.




For more information or assistance using Shared Access, please call the NEFCU Contact Center at 800.400.8790.

## Subusers CAN:

- View accounts they are entitled to *(balances and history)*
- Transfer between accounts for which they have transfer permissions
- Pay bills via the BillPay™ widget or directly within BillPay
- Change username, password, email address, and security contacts associated with their login

## Subusers CANNOT:

- View Third Party Services, including eDocuments, VISA Online Access, Money Movement Services, and Money Management
- Transfer money outside of the account holder's accounts
- Access online banking via the NEFCU Mobile App

802.966.8200 | 800.400.8790
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# Shared Access User Guide

*Providing account owners with control. Share online banking access with associates, family, or others so they can conduct permitted transactions on your behalf.*

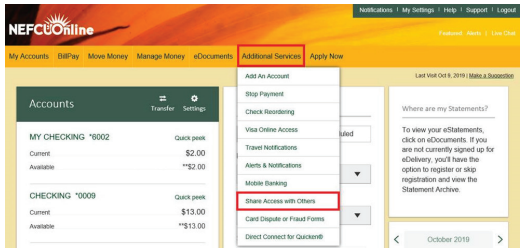
# Setting Up Shared Access

Sometimes, you need to share account access with people you trust. With Shared Access, you can authorize selected individuals to perform financial management tasks within some or all of your accounts. Shared Access offers:

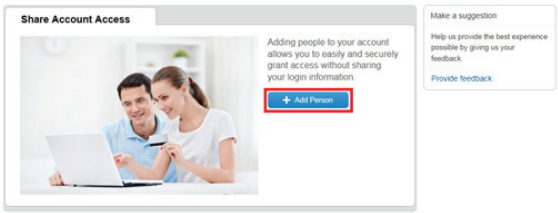
- **Improved financial management** – designate others to make payments and transfers, view balances, view check images and more.
- **Complete control** – manage permissions, set transaction limits, and require authorizations for certain types of transactions.
- **Increased security** – grant access without ever sharing your personal login information.

To get started, here's what you need to do:

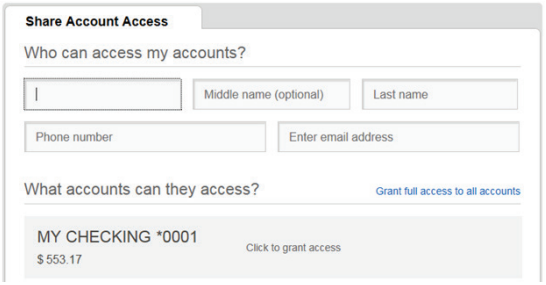
**Step 1 —** Log in to NEFCUOnline and click on **Additional Services > Share Access with Others.**

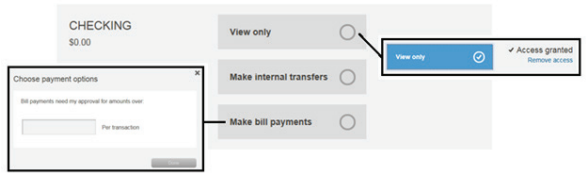



**Step 2 —** Click on **Add Person** to create a subuser.

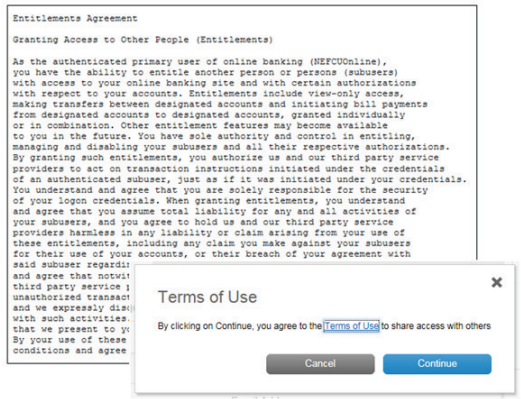


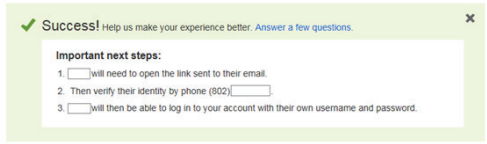

**Step 3 —** Enter your subuser's name and contact information on the setup form. Select the account(s) your subuser can access. You can grant full access to all accounts or assign the following permissions to individual accounts: view only, make internal transfers, and/or make bill payments. For bill payments, you'll be required to set transaction limits. Once access has been assigned, click **Save**.



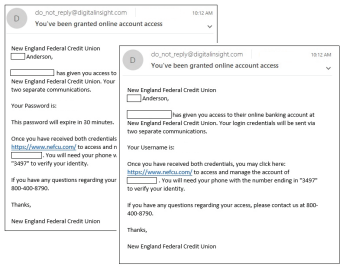




**Step 4 —** Review the Entitlements Agreement. Click **Continue** to agree to the Terms of Use and then a "Success!" message will appear with next steps. An email will also be sent to confirm that a subuser has been granted access to your account.



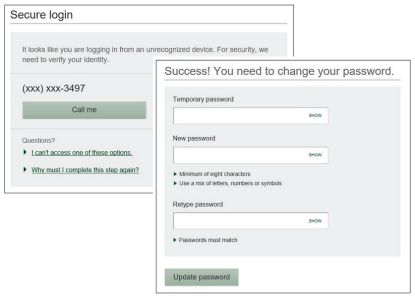



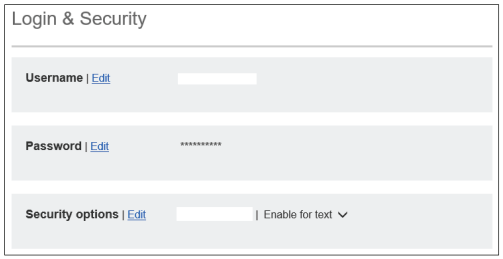

**Step 5 —** Your subuser will then receive an email with a temporary username and password. This email will include instructions to log in to NEFCUOnline to confirm their access. Please note that the password expires after 30 minutes.




**Step 6 —** When your subuser logs in to NEFCUOnline using their temporary username and password, they will be asked to accept the terms and conditions.

**Step 7 —** The subuser will then need to verify their identity and create a new password.




**Step 8 —** Once the subuser successfully logs in to their account, they can change the auto-generated username to something that's easier to remember. Click on **My Settings** to update login and security information.