

New Online Access Setup Instructions



Business Owner Setup Instructions

First-Time Setup Username

To get your business setup in the new Online Access you will need your **business' first-time setup username**. Once you're done getting setup, you will login to the new Online Access using the **unique username** you created.

Your **business' first-time setup username** is made up of the first two letters of the business' name as it appears on CU1's records, and the last six numbers of the business' Employer Identification Number, followed by the letter B for business. You must capitalize the first two letters when entering your username.

If your business is a sole proprietorship or a "Doing Business As" account, use your social security number instead of the EIN and the first two letters of your last name, followed by the letter B for business.

If the business' name starts with "the" the first two letters of the first-time setup username will be TH.

As an example, if your business is named *The Coffee Shop* and the EIN is 123-45-6789, your business' first-time setup username would be TH456789B.

WRITE YOUR FIRST-TIME SETUP USERNAME HERE:

You must capitalize the first two letters when entering your username.

B

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First two letters of your business nameLast six digit of the tax identification number

Setup Instructions

Now that you've got your first-time setup username and the password for your main member number, let's get you setup in the new Online Access! Here are the steps you will be walked through during the setup process:

1. Enter your **business' first-time setup username** into the username box and click **Login**.
2. Enter the existing password for your **main member number** and click **Login**.
3. Create a new **password** for the new Online Access. If your old password meets the new criteria you'll still need to create a new password.
4. Create a new, **unique username**. Once you're done getting setup, this will be the username you use to log into the new Online Access.
5. Choose five new **Security Questions** and **Answers**.
6. Pick a **Confidence Image** (or upload your own) and create an **Image Secret**. You'll know you're logging into your account in the new Online Access when you see the correct **Confidence Image** and **Image Secret**.
7. Confirm your **Email** and **TimeZone**.
8. Choose to **Complete Your Profile**.
9. Choose **Agree** to the terms and conditions of the new Online Access.
10. You're in! Take a moment to look around, and don't forget to setup your **Notifications**.