BEFORE THE INTEGRATION CHECKLIST

Here's a quick checklist to help you get ready for Banking System Integration.

MONDAY **May 3 before 12:00 p.m.:**

☐ Send any planned *Interac* e-Transfers® and remind recipients to accept the funds prior to May 5 at 5:00 p.m. CDT.

WEDNESDAY **May 5 before 5:00 p.m.:**

☐ Accept any pending e-Transfers.
☐ Make a list of, print, or screenshot all e-Transfer recipient email addresses and keep them in a safe place.
☐ Screenshot and save/print your e-Transfer history.
☐ Deactivate Autodeposit feature.
☐ Ensure any bills due between May 7 and 12 have been paid.

FRIDAY **May 7 before 5:00 p.m.:**

☐ Make note of any current alerts set up in online and mobile banking.
☐ Take out cash and/or ensure there is limit available on credit cards to pay for transactions in case of service interruptions.
☐ Complete any in-branch banking early to avoid delays.

BUSINESS ONLINE BANKING USERS ONLY

☐ Take screenshots of the Delegate Manager page to capture current delegates and the level of access granted.
☐ Take screenshots of the Account Consolidation Manager page for current memberships and associated PANs consolidated in online banking.
☐ Ensure all outstanding transactions requiring approval are completed.

ACCESS CREDIT UNION

(?) **cusuccess.ca**

AFTER **THE INTEGRATION** CHECKLIST

Please use this guide on or *after* May 9, 2021.

ONLINE & MOBILE BANKING

☐ Log in from the accesscu.ca website using your existing login ID (Personal Access Number – PAN).

*IMPORTANT: You will need to delete the CCCU Mobile app and download the Access Credit Union 24/7 app, which is on Google Play™ and the Apple App Store®. If you mainly use the mobile app, please sign in using the desktop version of online banking through your computer or laptop **first** before accessing the app.*

☐ Once you have logged in with the temporary password, you will be prompted to set up a new strong password. The requirements are:

> No fewer than 10 and no more than 30 characters including an uppercase letter, a lowercase letter, and a number

> We recommend your password include a special character. Accepted special characters are: @ # $ - | !

It is important to keep your password confidential.

☐ You will then be asked to set up three (3) new security questions and answers.

In addition to the login changes, you may wish to reset some settings and features that did not carry over with the new system:

☐ Reset Alerts
☐ Reset Memorized Accounts
☐ Re-populate your e-Transfer sender profile
☐ Re-create your Autodeposit setting
☐ Reset your list of delegates
☐ Re-consolidate your accounts

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