## **MEMBER INFORMATION GUIDE – FIRST TIME LOG IN**

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## FIRST TIME LOG IN TO ONLINE BANKING

1. To access the online banking system, go to the CUA website at <u>cua.com</u>. Once you are on the website, click the green "Sign in" link in the top right-hand corner of the menu bar.

Personal	Business	About CUA	Tools	Rates	In Our Community	Find Us Con	tact Us Q Search	A Sign In
CU	y to bonk				Banki	ng Lending	Planning & Investing	CUAdvice

 You will then be brought to the new user sign in page. To begin, enter your 19-digit Member (Debit) Card number in the 'Debit card number or username' box. If you do not have a physical Member (Debit) Card, enter the 16-digit Virtual Card Number that you were provided. This was given to you when you set up your account. Click 'Continue'.

Note: **Do not** select 'Forgot username or password?' for your first-time logging in, as you need to go through the process of verifying your contact details and creating a profile. Once you've created a profile, you can use this option to retrieve or reset your login credentials in the future. If you are having trouble logging in for the first time, please call our Customer Contact Centre at 902.492.6500.



3. You will then be asked to walk through setting up a profile. Enter your: 1) date of birth (see step 4), and 2) either your mobile phone number or email address. Then, 3) click 'Confirm' next to the verification method you selected.

Note: This information must match the details on your account profile. If they do not match or are not on file, you will receive an error message directing you to contact CUA. Before contacting us at 902.492.6500, please try both your mobile phone number and email address.

	The better way to bank Welcome!	
	We see that you're a new CUA online banking user. You'll need to set up a profile in order to access your banking information. Don't worry! We'll walk you through two simple steps. For identification and security purposes, please enter your date of birth and either the mobile phone number	
* Member/Debit Card Number (populated from previous step)	An authentication code will be sent to the mobile phone number or e-mail for confirmation.	
1)	Date of birth	
2)	Canada +1	3)
	Confirm >	
	Continue	

4. When using the calendar for your date of birth, you do not need to scroll day by day to find the date. You can quickly scroll to the appropriate year by clicking on the current date. One click shows you all of the months in the current year. Two clicks shows you a 10-year span, making it easy to scroll to the year you need.

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Sun	Мо	Tue	Wed	Thur	Fri	Sat	he format MMM DD,		
28	29	30	31	1	2	3			
4	5	6	7	8	9	10	t to the mobile phone		
11	12	13	14	15	16	17			
18	19	20	21	22	23	24			
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As an example, to enter the birth date January 1, 1960, click on today's date twice to see the 10-year span 2020-2029. You can then use the left arrow to scroll to the 10-year span of 1960-1969.

«	2020	-2029		b 9
2019	2020	2021	2022	b
2023	2024	2025	2026	
2027	2028	2029	2030	ł
Date	of bir	th		1

Once there, click on your birth year - in this example, 1960.

<b>«</b>	1960	1969	>>	b 9
1959	1960	961	1962	b
1963	1964	1965	1966	
1967	1968	1969	1970	

You will then be shown all 12 months of 1960. Click on the correct month.



Then, you will see all of the days within that month and year. Click on the appropriate day and your birthdate will populate into the field, and you can proceed to the next step.

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31	1	2	3	4	5	6	
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5. If the information entered in the above screens matches the information on file at CUA, you will be prompted to enter an authentication code which will be sent to your mobile phone number or email address that you entered above. Enter the code and click 'Confirm'.

E-mail Confirmation	Mobile Phone Number Confirmation
An authentication code has been sent to your e-mail. Enter in the code you have received.	An authentication code has been sent to your mobile phone. Enter in the code you have received.
enter code	enter code
If you don't receive the email within 10 minutes, <u>resend the code</u> .	If you don't receive the code within 10 minutes, $resend the code$ .
Confirm	Confirm

6. After successfully entering the authentication code, you will be asked to select a new username and password. Once you've selected your new login credentials and accepted the terms of the *Direct Service Agreement*, click 'Continue'.

Note: The username should be something you will easily remember, as you will use it to sign into online banking from now on. It also cannot be changed once set, so please ensure you enter it carefully.

	The better way to bank Step 1 of 2: Create a new user profile	
Wel nev pas	come CUA Member You'll need to set up a v user profile consisting of a username and a strong sword.	
- Fu	Isername	
Ente	rusername	
E	nter new password	
Pass (X) (X) (X)	sword strength: Weak ) Minimum 10 characters ) Minimum 1 uppercase letter ) Minimum 1 lowercase letter	
×	) Minimum 1 number	
R	e-enter new password	
	I have read and accept the terms in the Direct Service Agreement.	
	Continue	
	Cancel	

7. You will see a summary screen outlining your name, new username, concealed password and mobile phone number or email address. If you are satisfied with the information, click "Create user profile". If you need to make changes, you can click "Cancel" and re-enter your information.

The better way to bank Step 2 of 2: Confirm user profile	
You're almost done! Please review and create your user profile. Name Member name	
Username Member username Password *********** Mobile phone number CA (XXX) XXX-XXXX	
Create user profile Cancel	
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8. You can now proceed to log in to the new online banking system using the username and password you have just set!

The better way to bank Completed!
Your user profile has been created. You can now proceed to sign in to online banking using your new username and password.
Name Member name Username Member username
Password *********** Mobile phone number CA (XXX) XXX-XXXX
Proceed to sign in Copyright © 2024 CUA - All rights reserved

## FIRST TIME LOG IN TO MOBILE BANKING

- 1. Before you can access the new mobile banking system, ensure you have the latest version of the app installed by accessing the App Store on an iOS (Apple) device or the Google Play Store on an Android device.
- 2. Once the download is complete, launch the app and select 'Sign in'.



3. To begin, enter your 19-digit Member (Debit) Card number in the 'Debit card number or username' box. If you do not have a physical Member (Debit) Card, enter the 16-digit Virtual Card Number that you were provided when you set up your account. Click 'Continue'.

Note: **Do not** select 'Forgot username or password?' for your first-time logging in as your current identification details will not match our records. Once you've created a profile, you can use this option to retrieve or reset your login credentials in the future. If you are having trouble logging in for the first time, please call our Customer Contact Centre at 902.492.6500.



4. You will then be asked to walk through setting up a profile. Enter your: 1) date of birth (*see step 5*), and 2) either your mobile phone number or email address. Then, 3) click 'Confirm' next to the verification method you selected.

Note: This information must match the details on your account profile. If they do not match or are not on file, you will receive an error message directing you to contact CUA. Before contacting us at 902.492.6500, please try both your mobile phone number and email address.

that you're a new CUA online b leed to set up a profile to use the vorry! We'll walk you through two	anking user. e enhanced o simple
ntification and security purposes birth and either the mobile phor e on file for you.	s, enter your ne or e-mail
nentication code will be sent to th number or e-mail for confirmatic	he mobile on.
* Member/Debit Card Number (populated from previous step)	
f Birth	Ē
bile phone number	
Mobile phone number	3)
Confirm	)
nail	
Confirm	)
Continue	
Cancel	
	e that you're a new CUA online b need to set up a profile to use the vorry! We'll walk you through two ntification and security purposes birth and either the mobile phor re on file for you. nentication code will be sent to the number or e-mail for confirmation * Member/Debit Card Number (populated from previous step) f Birth bile phone number Mobile phone number Mobile phone number Confirm nail

5. When using the calendar for your date of birth, you do not need to scroll day by day to find the date. You can quickly scroll to the appropriate year by clicking on the year above the current date. This shows you a scrollable list of all years. As an example, to enter the birth date January 1, 1960, click on 2024. Then scroll upwards until you reach 1960. Click on 1960 so that it is coloured blue, and then click 'OK' in the bottom right corner.



Once there, you will be shown today's date within your selected year. Click on the left or right arrows to scroll to the correct month.

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L	28	29	30	31					
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Then, you will see all of the days within that month and year. Once you click on the appropriate day, click 'OK' in the bottom right-hand corner. Your birthdate will populate into the field, and you can proceed to the next step.



6. If the information entered in the above screen matches the information on file at CUA, you will be prompted to enter an authentication code which will be sent to your mobile phone number or email address that you entered above. Enter the code and click 'Confirm'.

E-mail Confirmation
An authentication code has been sent to your e-mail.
Enter code
If you don't receive the code within 10 minutes, <u>resend code</u> .
Confirm

7. After successfully entering the authentication code, you will be asked to select a new username and password. Once you've selected your new login credentials and accepted the terms of the *Direct Service Agreement*, click 'Continue'.

Note: The username should be something you will easily remember, as you will use it to sign into online banking from now on. It also cannot be changed once set, so please ensure you enter it carefully.

_	Setup user profile	
Step 1 of	2: Create a new user profile	
Welcome new user strong pa	e CUA Member! You'll need to set up a r profile consisting of a username and a assword.	
Username	e	
Password	ł	
Password	l strength: Weak	
× Mini	mum 10 characters	
× 1 up	percase letter	
× 1 low	vercase letter	
× 1 nui	mber	
Re-enter	password	
I hav Direc	re read and accept the ct Service Agreement	
	Continue	
_		

8. You will see a summary screen outlining your name, new username, concealed password and mobile phone number or email address. If you are satisfied with the information, click "Create user profile". If you need to make changes, you can click "Cancel" and re-enter your information.

	Setup user profile
Step 2	of 2: Confirm user profile
You're profile	almost done. Review and create your user
Name	handa ar
CUAN	lember
Userna	ame
ILove	CUA
Passw	ord
*****	*
Email	
meml	per@cua.com
	Create user profile
	Cancel

9. You can now proceed to log in to the new online banking system using the username and password you have just set!

Setup user profile
User profile was successfully created.
Your user profile has been created. You can proceed to sign in using your new username and password.
Name CUA Member
Username IL oveCUA
Password
Email member@cua.com
Proceed to sign in