

How to Add a User via Shared Access to Your Account



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- Log in to your online or mobile banking account. [Vermont Federal Credit Union](#)

A screenshot of the Vermont Federal Credit Union online banking dashboard. The top navigation bar includes links for Dashboard, Accounts, Transfer & Pay, Tools, Quick Apply, Financial Planning, and Help & Support. The main content area is titled "Dashboard" and features a user profile section with a question "Is your contact information up to date?". Below this is the "Accounts" section, showing a "Checking" account with a balance of \$22,739.28 and a "ReWARD" card. On the right, the "Savvy Money" section displays a credit score of 720 on a scale from 300 to 850, with icons for Score, Report, Monitoring, and Savings. A button labeled "Show my Score" is at the bottom of the Savvy Money section.

Dashboard Accounts Transfer & Pay Tools Quick Apply Financial Planning Help & Support

Dashboard

Is your contact information up to date?

Accounts

Checking

\$22,739.28

ReWARD

\$ 9.28

Savvy Money

720

300 850

Score **Report** **Monitoring** **Savings**

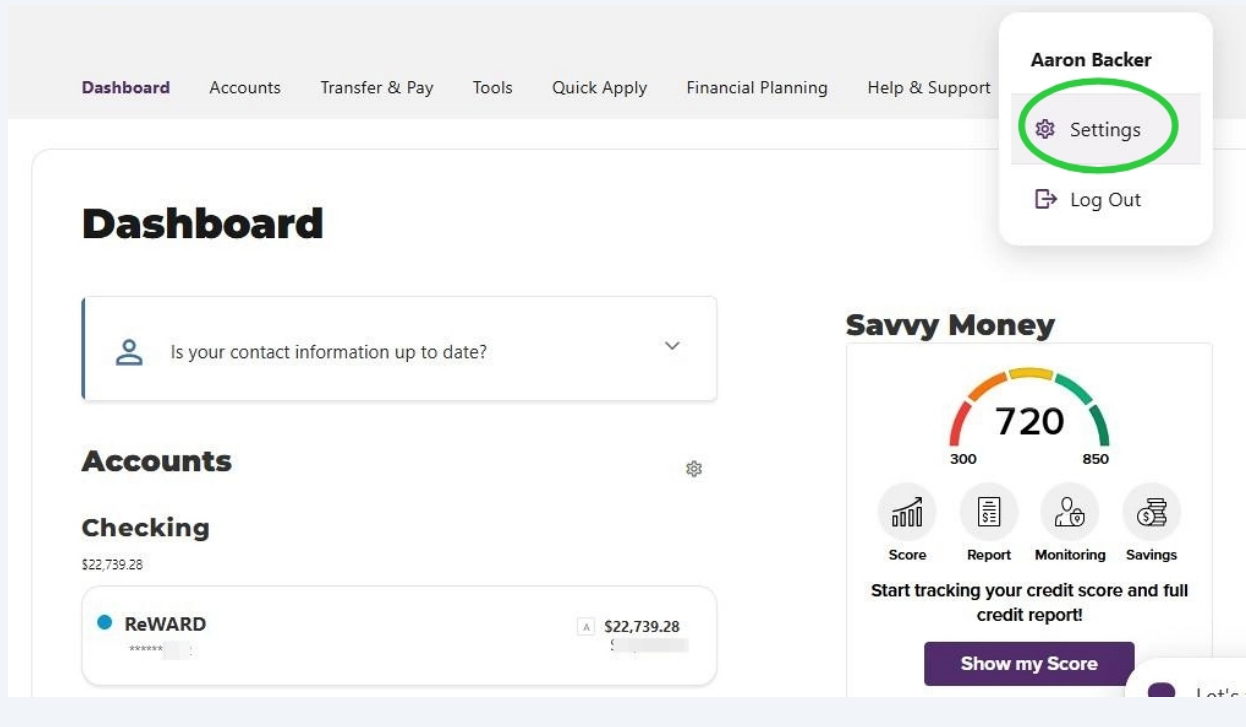
Start tracking your credit score and full credit report!

Show my Score

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• Access Settings

- Click on your **profile icon**.
- Select **"Settings"** from the dropdown menu.



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• Navigate to Shared Access

- In the Settings menu, click on **"Shared Access."**

Dashboard Accounts Transfer & Pay Tools Quick Apply Financial Planning Help & Support

Settings

Profile Security Contact Accounts **Shared Access** Applications



Edit

Profile Information

FULL NAME

NICKNAME

Let's talk

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Click "Add a User."

Settings

Profile Security Contact Accounts **Shared Access** Applications

No shared access users

Shared Access allows users certain access to your Vermont Federal Credit Union accounts. Based off the permissions you set, users you add can: view, transfer to, transfer from, or pay bills. Click below to add users and set permissions for your Vermont Federal Credit Union accounts. .

+ Add a user

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• Fill in the required fields:

- **First Name**
- **Last Name**
- **Email Address**
- **Confirm Email Address**

Profile
Security
Contact
Accounts
Shared Access
Applications

Add a new user

First Name

Enter first name

Last Name

Enter last name

Email Address

Enter email address

Confirm Email Address

Enter email address

Choose permissions

	All permissions	View account	View Transactions	Transfer into	Transfer from	Pay bills
Checking - 1 account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ReWARD *****	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Let's

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• Set Permissions

- Choose the account(s) you want to share.
- Select the appropriate permissions:
 - ☒ All Permissions
 - ☒ View Account
 - ☒ View Transactions
 - ☒ Transfer Info
 - ☒ Transfer From or Pay Bill and click "**save**".

Last Name

Email Address

Confirm Email Address

Choose permissions

	All permissions	View account	View Transactions	Transfer into	Transfer from	Pay bills
Checking - 1 account	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ReWARD *****	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Savings - 1 account	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Primary Share *****	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save **Cancel**

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• Acknowledge and Confirm

- Check the box to **acknowledge** the terms Click **“Confirm.”**

• Invitation Sent

- The person will receive an **email invitation** to access your account.

Settings

Profile Security Contact Accounts Shared Access Applications

Confirm and invite user

Jack Smith - I org will be given access to the following accounts:

Checking - 1 accounts	View account	View Transactions	Transfer into	Transfer from	Pay bills
ReWARD *****	•				
Savings - 1 accounts	View account	View Transactions	Transfer into	Transfer from	Pay bills
Primary Share *****	•		•	•	

- Jack Smith will be sent an email invitation to access your accounts.
- A confirmation code will be given to you to share with Jack Smith. This code will expire in 24 hours.
- Jack Smith will then be able to access your accounts with their own username and password.



I acknowledge one or more of the settings selected will allow the invitee to transfer money from my account/accounts.

Confirm

Cancel

Let's tal

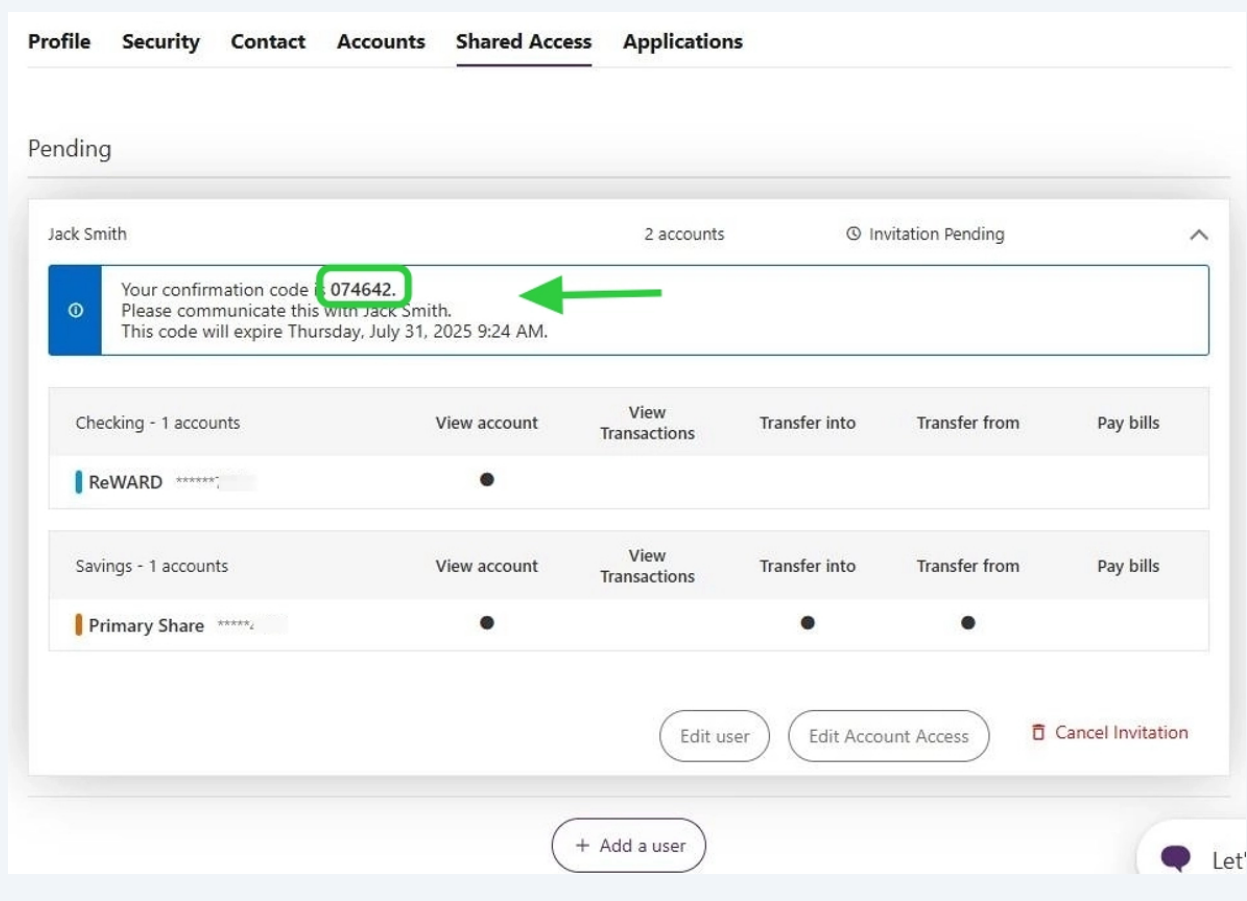
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• Share the Confirmation Code

• You'll receive a **confirmation code**. Share this code with the person—it will **expire in 24 hours**.

• User Access

• The invited person can now access your account using **their own username and password**.



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• Manage Access Anytime

• You can:

- ■ Edit user information
- ■ Modify account access
- ■ Cancel the invitation at any time

If you encounter any issues, please contact member support for assistance (888) 252-0202. Thank you!