

GET STARTED GUIDE

Shared Access



Grant Account Access

Shared Access allows you to grant account access to the people you trust. With Shared Access, you can authorize select individuals to perform financial management tasks for you.

NOTE: You will need to be registered for Online Banking in order to use Shared Access. See the "GET STARTED GUIDE: Online Banking" for details on registering for Online Banking in just a few quick steps.

1. To begin with Shared Access, visit forritcu.org and log into Online Banking using your username and password.
2. Once logged in, navigate to "More Services" on the main menu, and click on "Share Access with Others".
3. Click "Add Person" to create a subuser.
4. Enter your subuser's name and contact information. Select the account(s) your subuser can access. You can grant full access to all accounts or assign the following permissions: view only, make internal transfer. Click "Save".
5. Review the Terms of Use. Click "Continue" to agree to the Terms of Use, and then you will see a "Success!" message.
6. Your subuser will receive an email with temporary username and password. The email will also include instructions on how to set up their account.
7. Once subuser successfully logs in to their account, they can change their login credentials.

FAQ

What will subusers be able to access?

Subusers will only be able to view accounts and make transfers from the accounts they have access to. For the accounts to which they have access, they will be able to view balances and transaction history, deposit images, and download transaction history. The subusers will NOT be able to access Bill Pay, Purchase Rewards, Online Statements or other Third-Party services. They will also not be able access online banking via mobile web or mobile app.

Can I give a subuser access to the accounts of my choice?

Yes, you can grant view only or make internal transfer to the set of accounts you want the subuser to view or access.

Can I change or remove a subuser's access to my accounts?

Yes, you can change or remove a subuser's access at any time by visiting the "Shared Access with Others" page. Locate the subuser's name, and use "Options" dropdown on the right to update or remove a profile.

Can I change subuser's account information?

Yes, you can edit the subuser's name, email address, phone number, and permissions by clicking "Options" dropdown next to their name. Account holders cannot edit the subuser's username or password.

What if my subuser forgets their username or password?

The subuser can retrieve their username or reset their password using the "Forgot Password?" link in the login box on forritcu.org. As the account holder, you can also reset a subuser's password from "Access Shared with Others" page.