



Cross-Account Access

Setting up Cross-Account Access lets you create one central login to view, withdraw and deposit money between accounts with different owners.

Common uses for Cross-Account Access

- Spouses or partners give each other access to joint or individual accounts
- Children give account access to their parents
- Aging parents give account access to adult children
- Members with a personal and business account at CCCU

Setting Up Cross-Account Access

Use the directions below to give account access to another CCCU member.

1. Log into Online Banking
2. Click User Options
3. Click Cross Account Access Permissions
4. Click Add New User
5. In the box next to New User's Nickname, type your name. Your nickname must be at least 5 characters, can be no more than 20 characters long, can have numbers, and cannot have spaces or special characters.
6. In the box next to New User's Last Name, type in the last name of the account owner you're giving access to. Capitalize the first letter of the last name.
7. In the box next to New User's Account Number, type in the member number of the account owner. This is the member number of the person you're giving access to. This is not your account number.
8. Select which accounts you are granting access to and what type of access you are granting to the account owner
9. Click Add User with Settings

The person you granted access to must accept your access. See directions in the section below.

Repeat the steps above to give access to your account to others. Ask others to follow the steps above to give account access to you.

Here is an example of what steps 5 through 7 look like. In this scenario, Josie is giving John Doe access to his account. Josie types in her own name under "New User's Nickname." Josie types in John Doe's last name under "New User's Last Name." Josie types in John Doe's five or six digit member number under "New User's Account Number."

New User's Nickname	<input type="text" value="Josie"/>	→ Josie typed in her name.
New User's Last Name	<input type="text" value="Doe"/>	→ Josie typed in John Doe's last name.
New User's Account Number	<input type="text" value="123456"/>	→ Josie typed John Doe's member number.



Accepting Cross-Account Access

Once you've been granted access to another person's account, use the directions below to view the account through online banking.

1. Log in to online banking
2. Click User Options
3. Click Cross Account Access Permissions
4. Click View My Cross-Account Permissions
5. Click Show me this account
6. Click Save Settings

The shared account will appear in the Accounts section of your Dashboard or Summary page by clicking on the "Load Household Account..." button.