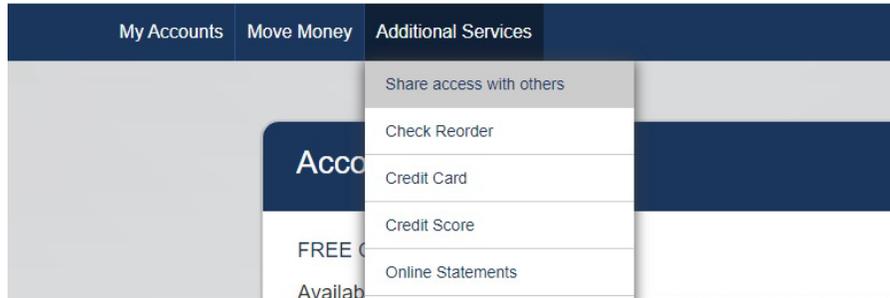


How to add a Secondary User

1. In the main menu bar, go to **Additional Services > Share access with others.**



2. A new window will appear titled Share Account Access.

- Click on the [Add Person](#) button.



3. Enter the new user's name, phone number and email address, and choose the type of access you would like to allow, then click [Save](#).

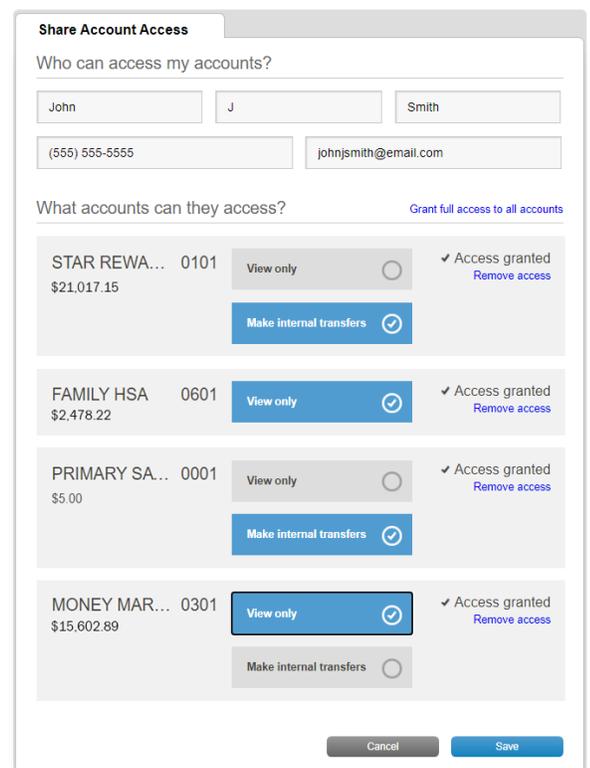
Access Options:

- 1.) Full access to all accounts to view and make internal transfers.

- 2.) Partial access to select accounts.

Click on each account, and choose:

- View Only.
- Make Internal transfers.
- Remove access (if either of the other options are already selected).



Share Account Access

Who can access my accounts?

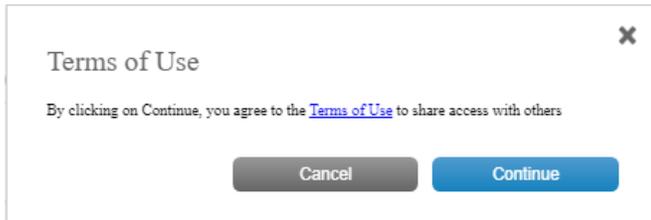
John J Smith
(555) 555-5555 johnsmith@email.com

What accounts can they access? [Grant full access to all accounts](#)

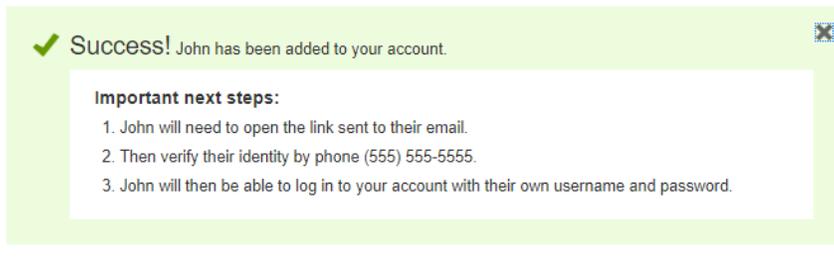
STAR REWA... \$21,017.15	0101	View only <input type="radio"/>	<input checked="" type="radio"/> Access granted Remove access
		Make internal transfers <input checked="" type="radio"/>	
FAMILY HSA \$2,478.22	0601	<input checked="" type="radio"/> View only	<input checked="" type="radio"/> Access granted Remove access
		Make internal transfers <input checked="" type="radio"/>	
PRIMARY SA... \$5.00	0001	View only <input type="radio"/>	<input checked="" type="radio"/> Access granted Remove access
		Make internal transfers <input checked="" type="radio"/>	
MONEY MAR... \$15,602.89	0301	<input checked="" type="radio"/> View only	<input checked="" type="radio"/> Access granted Remove access
		Make internal transfers <input type="radio"/>	

Cancel Save

4. In the pop-up window, click on [Terms of Use](#) to read, click [Continue](#) to accept and proceed.



5. The new user will need to follow the below steps to gain access to your account.



6. To make changes to a user's profile or edit their access, navigate to the Share access with others in the menu as in step 1, and there will be several options:
- Toggle the Access button between **YES** and **NO** to temporarily pause/unpause all access.
 - Options > Update profile.
 - Make any changes necessary, including the user's name and contact information.
 - Options > Reset password.
 - This will generate a new password for the user to access your account.
 - Options > Remove profile.
 - This will permanently delete the user and they will no longer have access to any of your accounts.

