How to add a Secondary User

1. In the main menu bar, go to **Additional Services > Share access with others.**
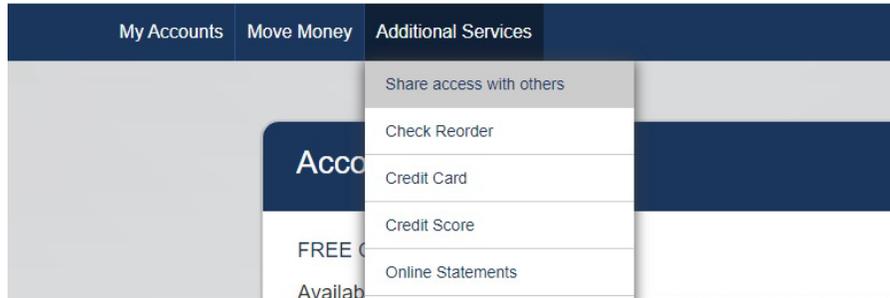
2. A new window will appear titled Share Account Access.
   - Click on the Add Person button.

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).

4. In the pop-up window, click on Terms of Use to read, click Continue to accept and proceed.
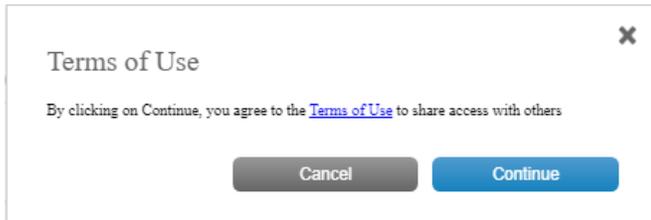
5. The new user will need to follow the below steps to gain access to your account.
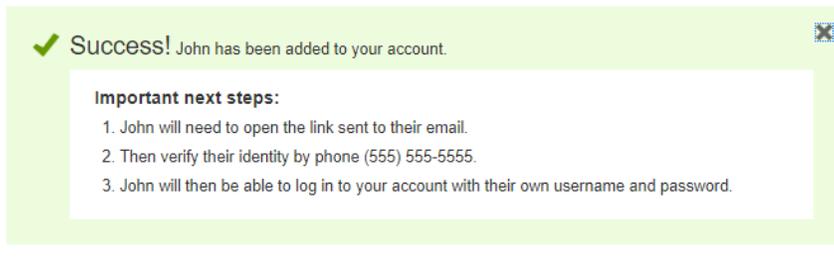
6. To make changes to a user's profile or edit their access, navigate to the Share access with others in the menu as in step 1, and there will be several options:
   - Toggle the Access button between YES and NO to temporarily pause/unpause all access.
   - Options > Update profile.
     - Make any changes 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.