PhoneBanking Tip Sheet

(408) 524-4500  •  (855) 500-P1CU
Option 1

TIPS
• Press * at any time to return to the previous menu.
• Press # at the end of your selection to complete the transaction.
• When prompted for an account # enter the 2 to 3 digit # associated with the account type. For example: A share account is 01.

For the account menu, press #1
To block a lost or stolen credit or debit card, press #3, #1
For accounts and loan inquiries, press #1,
For payments, transfers & withdrawals, press #2
To stop a payment, press #4, #4

When prompted, provide your Member # and access code.

SAMPLE TRANSACTIONS

MAKE A LOAN PAYMENT
Press #2 for payments/transfers/withdrawals
Press #1 for loan payment
Select the account from which to make payment
  #1 from share account
  #2 from share draft account
  #3 from another account

ACCOUNT TRANSFERS
Press #2 for payments/transfers/withdrawals
Press #2 for transfer
Select from the following options:
  #1 Share to share draft transfer
  #2 Share draft to share transfer
  #3 Loan to share draft transfer
  #4 Loan to share transfer
  #5 Select accounts for transfer
  #6 Select a loan and account transfer

WITHDRAWALS
Press #2 for payments/transfers/withdrawals
Press #4 for withdraw check
Select from the following options:
  #1 from share account to be mailed
  #2 from specific account to be mailed

BALANCE INQUIRIES
Press #1 for account/loan inquiries
Press #1 for account balance
Select the account from which to make payment
  #1 from share account
  #2 from share draft account
  #3 from another account

ACCOUNT ACTIVITY
Press #1 for account/loan inquiries
Press #2 for account history
Select the history to review
  #1 All activity
  #2 List of deposits
  #3 List of withdrawals
  #4 Dividends year-to-date

SHARE DRAFT/CHECKING INQUIRIES
Press #1 for account/loan inquiries
Press #3 for cleared share drafts
Select from the following options:
  #1 List of drafts in share draft account
  #2 Specific drafts in share draft account
  #3 Other account balance

For a complete list of menu options, see flow chart

Rev. 2/19