



# 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**

