



Online Services

E-Statements

E-Statements are a free service that allows you to access your monthly account statements online instead of by mail. With e-Statements, you can access your statements for up to 36 months. You will receive an email notification each month when your new statement is ready to view.

To sign up for e-Statements:

1. Click on **Online Services** then click **E-Statements**.
2. If you are new to e-Statements, you will be presented with the Electronic Statement Enrollment Disclosure.
3. Enter your current email address in the field provided.
4. Click the **I Consent** button.

View Your E-Statements

If you have already signed up for E-Statements, you will be able to view your electronic statements here.

To view your E-Statements:

1. Click on **Online Services**.
2. Click on **E-Statements**.
3. Click the E-Statement date you wish to view and your electronic statement will open within the same window.

Check Withdrawal

This form allows you to request a check payable to the primary owner of the account and sent to the address on file with CEFCU. The maximum amount you can request to have withdrawn is \$50,000 per day.

To request a check withdrawal:

1. Click on the **Online Services** tab.
2. Click on **Check Withdrawal**.

3. Select the account you would like to have the check withdrawn from in the drop-down menu. Only eligible accounts will be displayed.
4. Enter the amount you wish to withdraw.
5. Click on **Submit** to request the check. Any check request submitted prior to 4:30 p.m. on a Business Day will be mailed the same day. Check requests submitted after 4:30 p.m. will be mailed the next Business Day.

Stop Payment

You may place a stop payment on a loan check that you have written against your Personal Line of Credit or your Home Equity Line of Credit. A stop payment fee of \$15.00 will be deducted from your savings account for each stop payment request made. The request will be valid for 6 months after the date of the request.

Please note: Stop payments on checks are not guaranteed until 48 hours after the date of request.

To request a stop payment:

1. Click on the **Online Services** tab.
2. Click on **Stop Payment**.
3. Select "Place stop payment on the following account."
4. Select the account you would like to stop a payment on.
5. Select the account you would like the stop payment fee to be taken from.
6. Click **Continue**.
7. Enter the number of the check.
8. Select a reason for the stop payment request from the drop-down menu.
9. Click **Continue** and you will receive a confirmation that your stop payment has been placed.

If you would like to view existing stop payment requests:

1. Click on the **Online Services** tab.
2. Click on **Stop Payment**.
3. Select "Review existing stop payments from the following account."
4. Click **Continue**.
5. A table listing all of your stop payments will be displayed.

Alerts

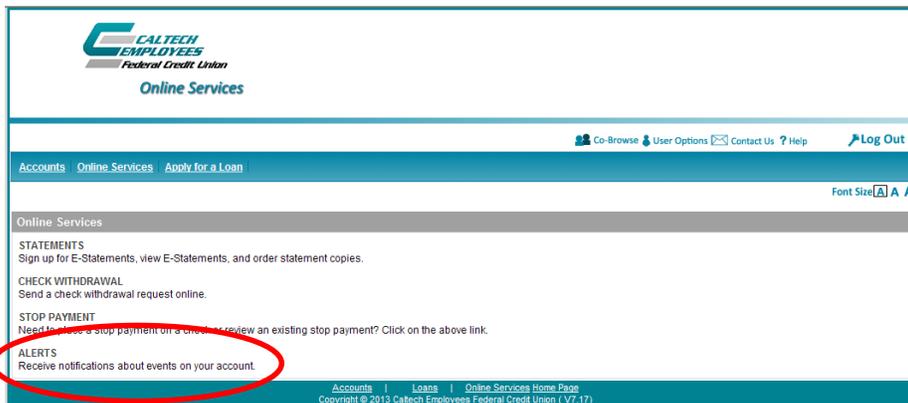
Alerts allow you to setup and receive email or text notifications about account activity important to you.

Some quick facts about Alerts:

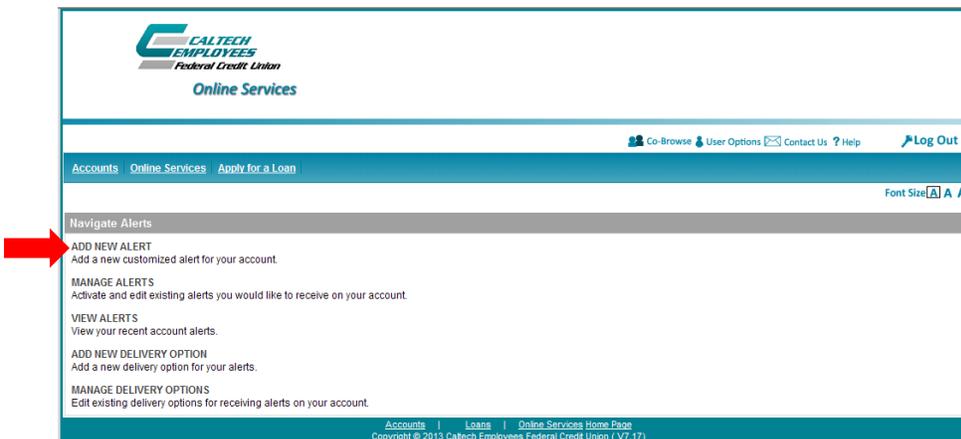
- Alerts are not real-time. They are processed every 2 hours between 8:00 a.m. and 8:00 p.m. (Pacific Time).
- The content of an Alert email contains no personal or account information. (See example of email at the bottom of this page).
- Alerts can be modified and turned on or off at any time within eBranch.
- A notification of an Alert will only be sent out once per occurrence. For example, you have an Alert setup to notify you when your balance goes below \$1,000.00. Your balance stays below that amount for five days. You will only get the alert on the first day.

How to Add New Alert

1. When logged in to eBranch, click on “**Online Services**,” and then click the “**Alerts**” link.



2. Choose “**Add New Alert**”.



- To view the available Alerts, click the down arrow to expand the list. From the drop down menu, click on the Alert you would like to set-up then click the “Next” button.

Caltech Employees Federal Credit Union Online Services

Co-Browse User Options Contact Us Help Log Out

Accounts Online Services Apply for a Loan

Font Size A A

Select an Alert

The following alerts are available for your account. Use the drop down menu to choose the alert you would like to configure below.

Notify me when:
A deposit has posted to my account.

Next Cancel

Accounts Loans Online Services Home Page
Copyright © 2013 Caltech Employees Federal Credit Union (V7.17)

- Enter the requested information on the Alert Setup screen then click the “Save Alert” button.

Caltech Employees Federal Credit Union Online Services

Co-Browse User Options Contact Us Help Log Out

Accounts Online Services Apply for a Loan

Font Size A A

Alert Setup

Alert type: My balance has fallen below a certain amount.

Alert nickname: Low Balance

Delivery option: Current Email Address Add New

Select account to watch: 0: REGULAR SHARE ACCT

Send alert when balance falls below: \$ 500.00

Save Alert Cancel

Accounts Loans Online Services Home Page
Copyright © 2013 Caltech Employees Federal Credit Union (V7.17)

How to Manage Alerts

This page allows you to make Alerts active (default), inactive or delete them.

To change an Alert, click on its nickname. This will take you to the Alert Setup screen. Some Alerts are Credit Union defined and are not editable by you. These Alerts have the Nickname grayed out and are un-clickable.

To change the email address of a recipient, click on the name in the Recipient column. This will take you to the Delivery Option Setup screen.

To change the status of an Alert or delete it, choose the appropriate boxes and click on “Update.”

CALTECH EMPLOYEES Federal Credit Union Online Services

Co-Browse User Options Contact Us ? Help Log Out

Accounts Online Services Apply for a Loan Font Size A A

Nickname	Type	Recipient	Active	Delete
Low Balance	My balance has fallen below a certain amount.	Current Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Invalid Login attempted on home banking account	Invalid Login attempted on home banking account	Current Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Alerts were changed	The alerts on your account were modified	Current Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Challenged	Your account was challenged to an unrecognized device	Current Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Add New Alert Cancel Update

Accounts | Loans | Online Services Home Page
Copyright © 2013 Caltech Employees Federal Credit Union (V7.17)

How to View Alerts

Click on “**View Alerts**” on the main navigation to view “**Recent Alerts.**”

This page will list all recent Alert activity on your account. Each Alert sent to you will be listed here along with the time and date that it was sent. You may delete items in your Alert history by choosing the appropriate box and clicking on “**Update.**”

How to Add New Delivery Option

This screen lists all of the delivery options currently setup. The “Current Email Address” is the email address we have on file for your account. To add a new delivery option, expand the drop down menu and select Text Message or Email Message and then enter the requested information in the appropriate fields. To modify the “Current Email Address,” you will need to use the “Change Email Address” page under “User Options.”

How to Manage Delivery Options

This screen lists all of the delivery options currently setup. The “Current Email Address” is the email address we have on file for your account. To modify the “Current Email Address,” you will need to use the “Change Email Address” page under “User Options.”

Click on the nickname or address to update your email. This will take you to the Delivery Option Setup screen.

To delete, choose the appropriate boxes and click on “Update.”

Example Alert Email You Will Receive

-----Original Message-----

From: eservices@cefcu.org [mailto:alerts@cefcu.org]

Sent: Sunday, January 1, 2006 10:00 AM

To: Your Email Address

Subject: CEFCU's eBranch Alert

My balance has fallen below a certain amount.

You are receiving this courtesy Email Alert because you have subscribed for this account notification through CEFCU's eBranch.

END OF: [{{(451cd3c9-b40d-4dd0-ad85-fdb812138d03)}}]