

## Alliant Online Banking 101

Setting up your online banking access, resetting a locked account and navigating online banking using a desktop, tablet or mobile phone web browser.

### Alliant Online Banking login page

You can access the online banking login page by clicking “Online Banking” at the top of Alliant’s homepage, [alliantcreditunion.org](http://alliantcreditunion.org). Or, you can navigate directly to [alliantcreditunion.com/onlinebanking](http://alliantcreditunion.com/onlinebanking).

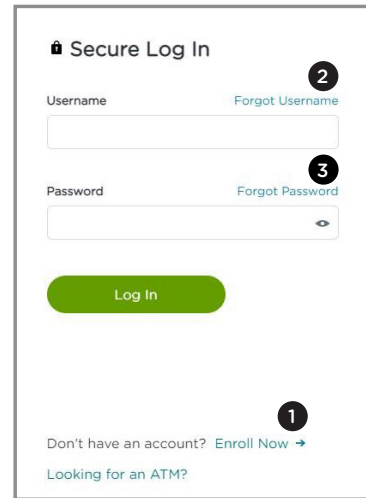
### Enrolling in online banking

On the login page, click **1** “Enroll Now” below the Secure Sign-In form, then follow the prompts to confirm your identity and create your online banking username and password. For your protection, you should not use a username or password that you use on any other website. Note: Your online banking username and password will also be used to log in to the Alliant mobile banking app.

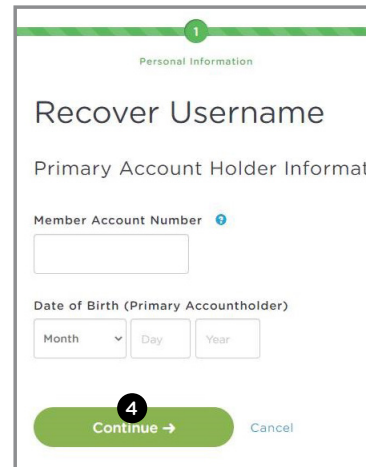
### Forgot your username or password?

If you’ve forgotten your Alliant Online Banking username or password, it’s easy to get back up and running so you can bank online. On the Alliant Online Banking login page, click either the blue **2** “Forgot username” or the **3** “forgot password?” link. On the forgotten username or password page, fill in the requested information and click the **4** “Continue” button to receive a reminder of your username or to reset your password. After clicking either button, you’ll be prompted to verify your identity before recovering your username or resetting your password.

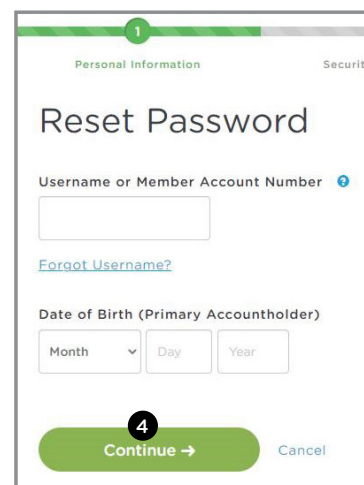
### Online banking login page



### Forgotten username page



### Forgotten password page



# Online banking dashboard

The screenshot shows the Alliant online banking dashboard. At the top right, there are links for 'My Profile & Settings' (1), 'Messages' (2), 'Help' (3), and a 'Log Out' button (4). Below this is a navigation bar with 'My Accounts' (8), 'Transfer Money' (16), and 'Pay Bills' (15). The Alliant logo is on the left. A blue banner at the top right displays 'Member Since 2013', 'Membership Number' (5), and 'Credit Score' (6). The main content area is divided into two columns. The left column, 'MY BANK ACCOUNTS' (7), lists 'Total Available:' and 'Total Interest (YTD)', followed by a list of accounts: 'Checking S40 \$3,671.08', 'Savings Account S01 \$4,530.63', 'Property Tax Escrow S21 \$2,555.26', and 'Vacation Fund S22'. The right column shows the 'Checking S' account (9) with tabs for 'Overview' (11), 'Manage Account' (12), 'Manage Card' (13), and 'Account Details' (14). The 'Overview' tab displays 'As of: 06/01/2023', a balance of '\$3,671.08 Available' (11), 'YTD Interest Earned' of '\$3.26' (12), and an interest rate of '0.25% Interest (APY)' (13). On the right side of the account overview, there are three green buttons: 'Pay Bills' (15), 'Transfer' (16), and 'Statements' (17).

- 1. My Profile & Settings.** Update or view your online banking settings and personal info like your address, emails and phone numbers.
- 2. Messages.** Send a secure message to our member care team when you have a question about a transaction or your account(s).
- 3. Help.** View online banking FAQs.
- 4. Logout.** Log out of online banking.
- 5. Membership Number.** Click this link to view your 10-digit Alliant member number.
- 6. Credit Score.** Access your credit score for free to help monitor and improve your credit worthiness.
- 7. My Bank Accounts.** View your total deposit account balances and year-to-date interest earned (Note: Certificates, IRAs and ESAs are listed lower on the screen).

- 8. My Accounts.** The default screen when you log in to online banking, the My Accounts page displays all your accounts in the left column. Click on any listed account to view transaction details on the right.
- 9. Account Number.** Click to view your account number.
- 10. Edit Account Name.** Create a custom name for your checking and supplemental savings accounts.
- 11. Overview.** This main account screen, shown above, displays your balance, interest rate and year-to-date interest.
- 12. Manage Account.** Access account management options (varies by account type).
- 13. Manage Card.** Report lost/stolen debit or Savings ATM cards, dispute transactions, order new cards, set travel notifications and change your PIN.

- 14. Account details.** View rate, joint owners, interest earned and more.
- 15. Pay Bills.** Use Bill Pay to:
  - Set up payees.
  - Make a one-time payment.
  - Set up recurring bill payments.
- 16. Transfer.** Set up one-time or recurring money transfers:
  - From one Alliant account to another Alliant account.
  - From an Alliant account to/from an account at another financial institution.
- 17. Statements.** Click to view your last 18 months of statements:
  - Alliant account statements.
  - Alliant Visa credit card statements.
  - Year-end Visa spending summary.
  - Tax statements.