



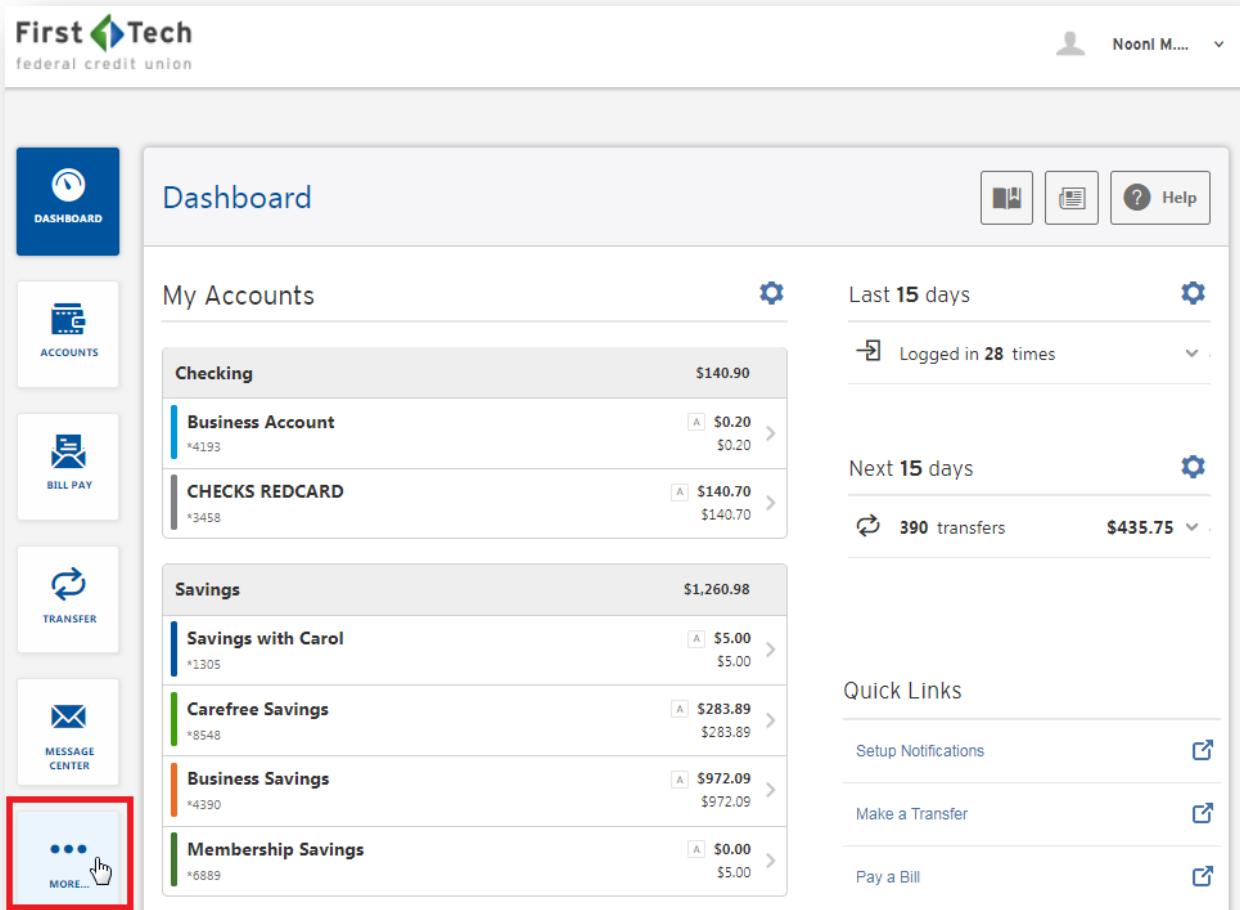
# STEP-BY-STEP GUIDE: Online Banking Using the e-Docs Widget



The following step-by-step guide was developed to assist you in navigating the e-Docs widget within Online Banking. You can also contact us at 855.855.8805.

Steps 1-5 are for members who do not see the “E-DOCS” widget on the left-hand side menu. If you already have the E-DOCS widget favorited, you can skip to step 9.

- 1) Log into First Tech Online Banking and select “MORE” from the left-hand side menu:



The screenshot shows the First Tech Online Banking dashboard. On the left, a sidebar contains icons for Dashboard, Accounts, Bill Pay, Transfer, Message Center, and a red-highlighted 'MORE...' button. The main area is titled 'Dashboard' and shows 'My Accounts' with sections for Checking, Savings, and Business accounts. To the right, there are summary sections for 'Last 15 days' and 'Next 15 days' activity, and a 'Quick Links' sidebar with links for Setup Notifications, Make a Transfer, and Pay a Bill.

Account Type	Account Name	Balance
Checking	Business Account	\$140.90
	*4193	\$0.20
	CHECKS REDCARD	\$140.70
Savings	Savings with Carol	\$1,260.98
	*1305	\$5.00
	Carefree Savings	\$283.89
	*8548	\$283.89
	Business Savings	\$972.09
*4390	\$972.09	
Membership Savings	\$0.00	
	*6889	\$5.00



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2) Click on "WIDGET OPTIONS":

The screenshot shows the First Tech Online Banking Dashboard. On the left, a vertical sidebar contains icons for DASHBOARD, ACCOUNTS, BILL PAY, TRANSFER, MESSAGE CENTER, and MORE... Below the sidebar are buttons for CHECK SERVICES, DEPOSIT, WIRES, INVESTMENTS, and E-DOCS. The E-DOCS button is highlighted with a red box. The main content area is titled "Dashboard" and "My Accounts". It displays account information for Checking, Savings, and Business accounts, including account numbers and recent activity. On the right, there are sections for "Last 15 days" (Logged in 28 times) and "Next 15 days" (390 transfers). A "Quick Links" sidebar on the far right includes links for Setup Notifications, Make a Transfer, and Pay a Bill. The "Widget Options" button is located in the bottom right corner of the main dashboard area, also highlighted with a red box.



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3) Scroll down to the “Available” section and click “Add” to manually add your “e-Docs” widget:



4) You can then select up to five favorited widgets. They’re active when the stars appear as yellow:

Settings

Widgets

Active

Widget	Description	Status	Action
Accounts	A quick snapshot of all your First Tech accounts.	★ (Yellow)	Remove
Bill Pay	Pay your bills without your checkbook.	★ (Yellow)	Remove
e-Docs		★ (Yellow)	Remove
Transfer	Transfer money from one account to another.	★ (Grey)	Remove
Message Center	Send us a secure message regarding your account.	★ (Grey)	Remove



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5) Your updated list of favorite widgets will appear on the left-hand side menu:

The screenshot shows the First Tech Online Banking dashboard. On the left, a sidebar lists several widgets: DASHBOARD (selected), ACCOUNTS, BILL PAY, E-DOCS (highlighted with a red box), TRANSFER, and MESSAGE CENTER. The main content area is titled 'Dashboard' and shows 'My Accounts' with sections for Checking and Savings. To the right, there are summary sections for 'Last 15 days' and 'Next 15 days' activity.

6) To access e-Docs, first, you need to “Subscribe” to use the feature:

The screenshot shows the 'e-Docs' section of the First Tech Online Banking interface. The sidebar on the left includes DASHBOARD, ACCOUNTS, BILL PAY, TRANSFER, and MESSAGE CENTER. The main content area is titled 'e-Docs' and features tabs for Overview, Statements, Notices, and Tax Forms. A message at the top says 'Welcome to your eDocuments!' and discusses changes to the e-Docs/e-Statements section. Below this, a note says 'If you need to access past statements, tax forms, or notices, please send a message through our **Message Center** indicating both the document type and the date the original document was released.' At the bottom, a message states 'Important Notice: We have made changes to the Membership and Account Agreement and our Limitation and Termination of Services Corporate Policy. Please review the summary of changes and policy [here](#)'. A 'Subscribe' button is highlighted with a red box at the bottom right.



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7) A “Subscription Disclosure” window will then pop up. Read through the disclosure content and if you consent check the “I Agree” box. Then, proceed to “Open PDF”. A PDF will open in another browser window, where you can access a unique 5-character code, for example “ZU812”. Enter the unique code from the PDF into the text box. Finally, click on “Subscribe” to finish:

Subscription Disclosure X

Your statements are now available.

Please accept the disclosure to confirm this change:

**Online Services E-sign Disclosure and Consent**

Please read this information carefully and print and retain a copy for your reference. This Online Services E-Sign Disclosure and Consent (“Disclosure”) applies to all Communications for those products, services and Accounts offered or accessible through the online services.

The words “we” “us”, and “our” refer to First Technology Federal Credit Union and the words “you” and “your” mean you, the individual(s) or entity identified on the Account(s). As used in this disclosure “Account” means the account you have with us. “Communication” means any customer agreements or amendments, monthly billing or account statements, tax statements, disclosures, notices, responses to claims, transaction history, privacy policies and all other information related to the product, service or Account, including but not limited to information that we are required by law to provide to you in writing

**Scope of Communication to Be Provided in Electronic Form.** When you use a product or service, you agree that we may provide you with any Communications in electronic format, and that we may discontinue sending paper Communications to you, unless and until you withdraw your consent as described below. Your consent to receive electronic

**I Agree**

Print

**PDF Access Confirmation**

Before you proceed, we need to make sure you can open PDF documents.

1. [Open PDF](#) Print

2. Copy the 5 character code into the text box below.

\*

Cancel Subscribe



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8) The page will automatically redirect you to the e-Docs page, showing:

**e-Docs**

Overview Statements Notices Tax Forms

Welcome to your eDocuments!

We have made some changes to the e-Docs/e-Statements section that will make it easier to view and access your e-Statements, Notices, and Tax forms. Click the tabs to discover what is available.

If you need to access past statements, tax forms, or notices, please send a message through our **Message Center** indicating both the document type and the date the original document was released.

Important Notice: We have made changes to the Membership and Account Agreement and our Limitation and Termination of Services Corporate Policy. Please review the summary of changes and policy [here](#)

 **SUBSCRIBED** You are receiving eStatements. [Unsubscribe](#)

9) To view or download your credit card, mortgage, monthly/quarterly membership statements, click on the “Statements” tab. To view a specific Statement within that tab, click on the item and it will pop up:

**e-Docs**

Dashboard Accounts Bill Pay Transfer Message Center E-Docs

Overview **Statements** Notices Tax Forms

**Statements**

e-Statements are released shortly after your statement cycle ends. Here you can view and download your credit card, mortgage, and monthly/quarterly membership statements.

If you need to access past statements, tax forms, or notices, please send a message through our **Message Center** indicating both the document type and the date the original document was released.

DATE DOCUMENT TYPE

All Dates All document types

DATE	NAME	ACCOUNT
JUN 30 / 2017	Member Combined Statement	Membership Sav... *6889
MAR 31 / 2017	Member Combined Statement	Membership Sav... *6889
<b>FEB 20 / 2018</b>	<b>Monthly Statement</b>	<b>*****9516</b>
JAN 18 / 2018	Monthly Statement	*****9516

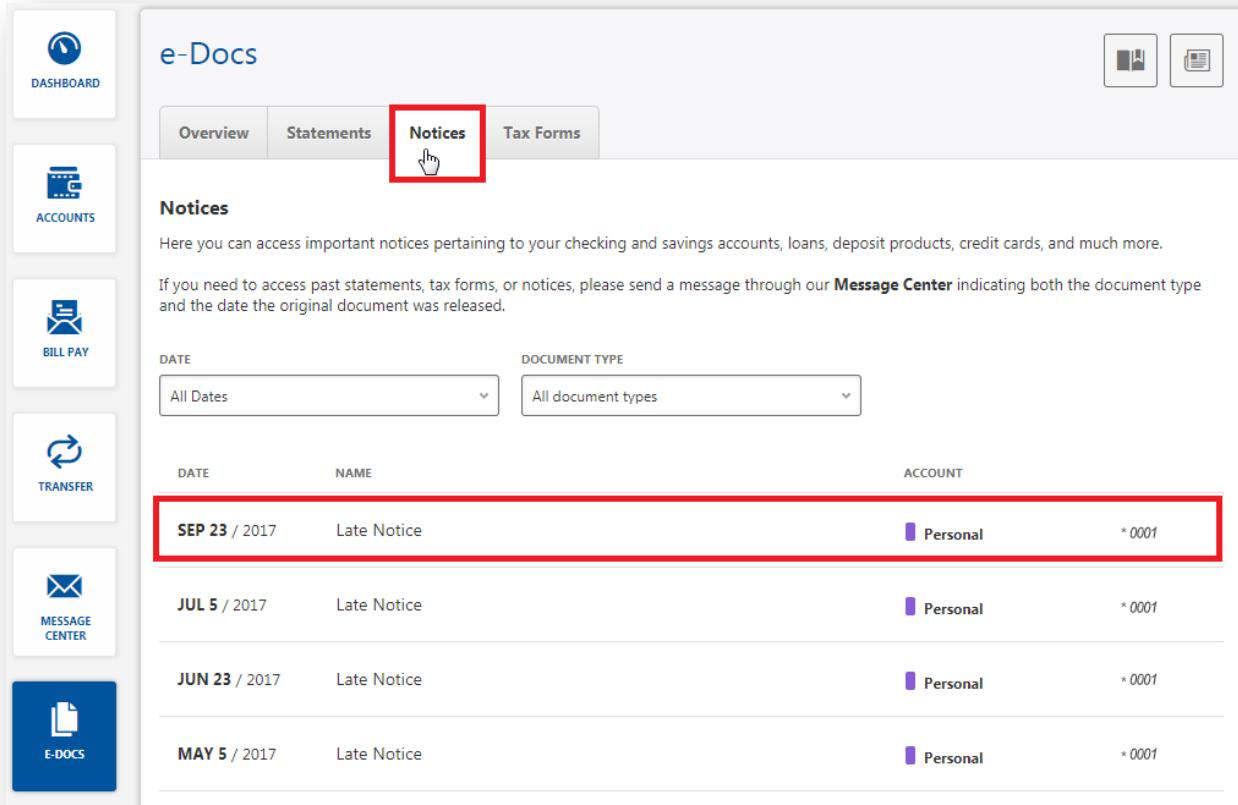


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## Using the e-Docs Widget

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10) To access important notices pertaining to your checking and savings accounts, loans, deposit products, credit cards, click on the “Notices” tab. To view the specifics of each notice, click on the item for it to pop up:



The screenshot shows the e-Docs widget interface. The top navigation bar includes tabs for Overview, Statements, Notices (which is highlighted with a red box and a cursor icon), and Tax Forms. Below the tabs, a section titled "Notices" is displayed, with a sub-instruction: "Here you can access important notices pertaining to your checking and savings accounts, loans, deposit products, credit cards, and much more." It also includes filters for DATE (set to "All Dates") and DOCUMENT TYPE (set to "All document types"). The main content area lists four notices, each with a red box around it. The first notice is for "SEP 23 / 2017" and is titled "Late Notice". The other three notices are for "JUL 5 / 2017", "JUN 23 / 2017", and "MAY 5 / 2017", all titled "Late Notice". Each notice is associated with an account type ("Personal") and an account number ("\* 0001").

DATE	NAME	ACCOUNT
SEP 23 / 2017	Late Notice	Personal * 0001
JUL 5 / 2017	Late Notice	Personal * 0001
JUN 23 / 2017	Late Notice	Personal * 0001
MAY 5 / 2017	Late Notice	Personal * 0001

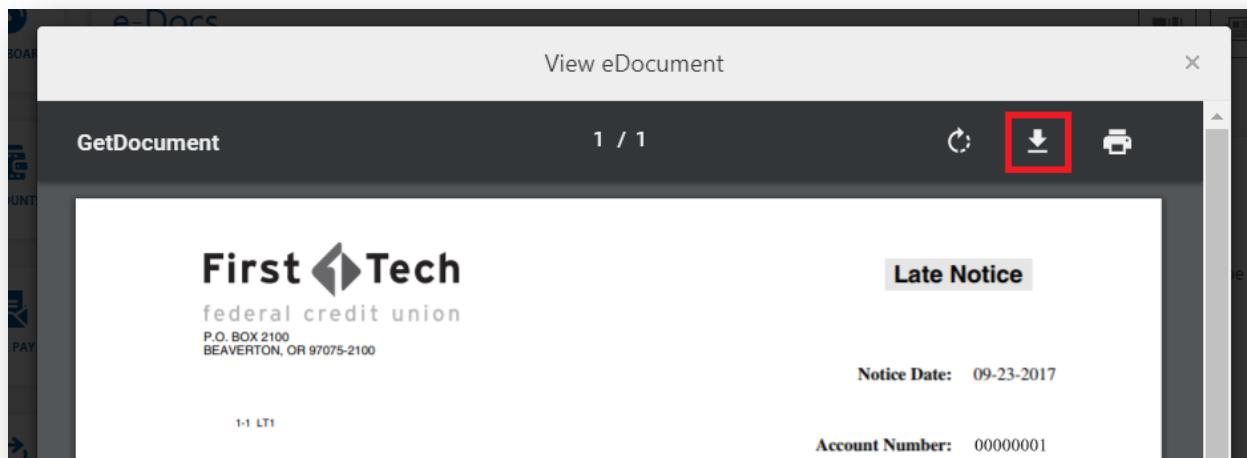


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## Using the e-Docs Widget



11) The Statement/Notice/ or Tab Form then pops up the “View eDocument” tab; where you can download and save the document as a PDF:



12) In the “View eDocument” pop-up tab, you can also print the document by clicking on the “printer” icon:

