

Electronic Statements User Guide

FI Enrolled



"the friendly bank" SM

www.oculinabank.com

1.877.962.8546

@ Enroll for eStatements

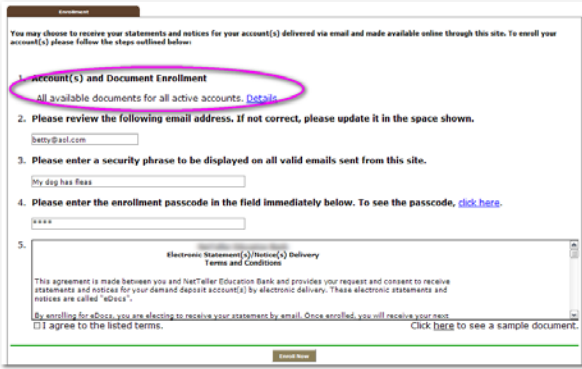
Select the eStatements tab from the menu bar.

The first time you click on the eStatements tab you'll be presented with an enrollment screen.

✓ Step 1 (optional)

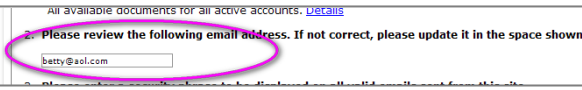
Click **Details** to see which accounts and document types you can enroll.

Remove the check boxes from any documents you wish to receive on paper.



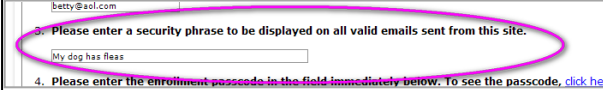
✓ Step 2

Make sure your email address is correct. If no email is listed, you must fill one in.



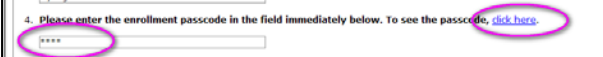
✓ Step 3

Enter a word or words that you will recognize. This is called your eStatement security phrase. Emails from us regarding eStatements will contain this phrase.



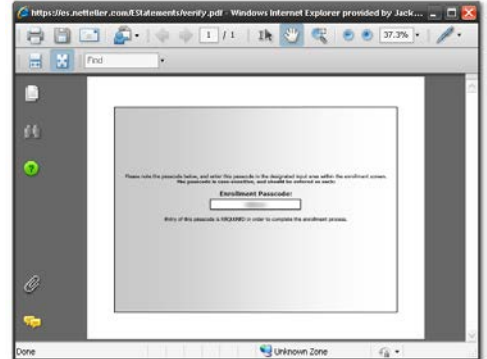
✓ Step 4

This step is your key to knowing if you'll be able to read eStatements online. You must have Adobe® Reader® 6.0 or higher installed on your computer to use the service.



First, click where it says [click here](#). This will open an Adobe PDF document in a new window.

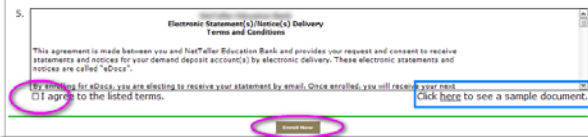
In the center of the PDF you will see a passcode word. This word is case-sensitive. Make a note of the passcode.



Then return to the enrollment screen and type the passcode into Step 4.

Step 5

Read our terms and conditions then check the box that says "I agree."
Finish by clicking the submit button.



To see a sample statement, click the link in the lower right hand corner.

Confirmation

You'll receive an email from us any time you enroll or un-enroll.

All emails from us regarding eStatements will contain the secret security phrase you created.

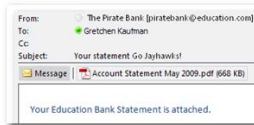


CONGRATULATIONS

on going paperless
and reducing waste!

Receiving Documents

You'll receive an email from us when your eStatement is ready.



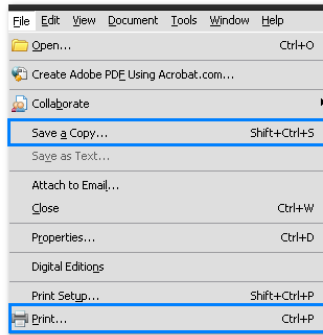
Login Shell

Make sure you see your security phrase.
Enter your Online Banking username and password.

Username:	<input type="text"/>
Password:	<input type="password"/>
	<input type="button" value="Login"/>

Saving and Printing

Because the statements open with Adobe, you can use the Adobe toolbar to print or save. (But you don't really want to print, do you?)



Other Tabs

Account Reconciliation

- ✓ Use the Recon tab to balance your checkbook

Change Email Address

- ✓ Update your address or security phrase through the Email tab

Retention

We retain statements online for 60 days and notices are kept for 30 days.

Be sure to save the statements to your computer or a disk for future reference.

Security Reminders

- ✓ We will NEVER email you for your personal information. Any email claiming to be the bank requesting personal information such as Social Security Numbers, IDs, or Passwords should not be trusted or opened.
- ✓ Do not write your password down.
- ✓ Change your password frequently.
- ✓ Use a different password to access your online accounts than ones you use for other applications.
- ✓ Always exit your online banking session before leaving your computer.

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