Setting Employee Permissions

What is this form for?

Use this document to indicate whether an employee will have access to PIB MLO and which permissions each of your employees will have in **BizLink 247** Online Banking.

PIB MLO is used to configure the permissions of users in **BizLink 247** Online Banking and to reset employee passwords.

Fill out this form for each of your employees to indicate the employee's permissions.

Employee Name: _____

Company ID* _____

Employee ID** _____

*Same for all employees at your credit union   **unique to employee

PIB MLO Permissions

This section allows you to configure whether this employee is an administrator of PIB MLO. It is recommended that you select at least one employee to have "Full Administrator" permissions and at least one employee to have "Reset Employee Passwords" permissions.

All other employees will just be able to login to **BizLink 247** Online Banking. Permissions for **BizLink 247** Online Banking are covered on the following pages.

Do you want this employee to have access to PIB MLO? (Select one of the following)

Yes. I want this employee to have access to PIB MLO.
I want this employee to have all permissions and be a **full administrator**.

With "Full Administrator" permissions, an employee can set up new users and change permissions of users. This employee can also reset employee passwords.

Yes. I want this employee to have access to PIB MLO.
I want this employee to have permission to **reset employee passwords** but not have other administrator privileges.

No, I do not want this employee to have access to PIB MLO.
I just want this employee to have access to **BizLink 247** Online Banking.

BizLink 247 Online Banking Permissions

The rest of the document allows you to set the permissions for the user in **BizLink 247** Online Banking.

Step #1: Login and Device Management

This section allows you to configure when and where this employee can access online banking. By default day and time access is set to "No" (no access) and restrict access to all devices is set to "No" (all devices allowed).

I want to **allow** access on these days: This permission lets you pick which days of the week this employee can access online banking.			
	Sunday	☐ Yes	☐ No
	Monday	☐ Yes	☐ No
	Tuesday	☐ Yes	☐ No
	Wednesday	☐ Yes	☐ No
	Thursday	☐ Yes	☐ No
	Friday	☐ Yes	☐ No
	Saturday	☐ Yes	☐ No

I want to **allow** access at these times: This permission lets you pick what time of the day this employee can access online banking.			
	Early morning: 12:00 AM ET to 4:59 AM ET	☐ Yes	☐ No
	Morning: 5:00 AM ET to 11:59 AM ET	☐ Yes	☐ No
	Afternoon: 12:00 PM ET to 4:49 AM ET	☐ Yes	☐ No
	Evening: 8:00 PM ET to 11:59 PM ET	☐ Yes	☐ No

I want to **restrict** access to only certain devices: This setting lets you restrict access of this employee to certain computers, mobile devices, or tablets.	☐ Yes (restrict)	☐ No (don't restrict)
	If yes, to how many devices?	

Step #2: Money Management

This section allows you to configure what transactions will be allowed and what will be blocked for the employee. For features you want to use, you can add an extra layer of security by requiring a confirmation code. By default everything is set to "No" or "not allowed."

I want to **allow** this employee to transfer money within my business account.	Allow?	☐ Yes	☐ No
	Confirmation code?	☐ Yes	☐ No
	Restrict the total dollar amount per transaction.	☐ Yes	☐ No
	Restrict the amount per transaction to:		

Step #2: Money Management (con't)

I want to **allow** this employee to transfer money to another account at the credit union.	Allow?	☐ Yes	☐ No
	Confirmation code?	☐ Yes	☐ No
	Restrict the total dollar amount per transaction.	☐ Yes	☐ No
	Restrict the amount per transaction to:		
I want to **allow** this employee to transfer money to and/or from another financial institution. Account to Account (A2A) transfer accounts and settings must first be set up by a credit union representative.	Allow?	☐ Yes	☐ No
	Confirmation code?	☐ Yes	☐ No
	Restrict the total dollar amount per transaction.	☐ Yes	☐ No
	Restrict the amount per transaction to:		
I want to **allow** this employee to manage automatic transfers. This permission controls whether this employee can view, create and change scheduled automatic transfers, including deleting scheduled transfers.	Allow?	☐ Yes	☐ No
	Confirmation code?	☐ Yes	☐ No
I want to **allow** this employee to manage automatic deposits This permission controls whether this employee can view ACH deposits and manage distributions.	Allow?	☐ Yes	☐ No
	Confirmation code?	☐ Yes	☐ No
I want to **allow** this employee to make check withdrawals. This permission controls whether this employee can request a check from the credit union for a specific amount.	Allow?	☐ Yes	☐ No
	Confirmation code?	☐ Yes	☐ No
	Restrict the total dollar amount per transaction.	☐ Yes	☐ No
	Restrict the total dollar amount per transaction to:		
I want to **allow** this employee to make check funds transfers This setting controls whether this employee can set up a scheduled payment by check.	Allow?	☐ Yes	☐ No
	Confirmation code?	☐ Yes	☐ No
I want to **allow** this employee to view cleared checks.	Allow?	☐ Yes	☐ No
I want to **allow** this employee to place stop payments on checks.	Allow?	☐ Yes	☐ No
I want to **allow** this employee to manage my overdraft services.	Allow?	☐ Yes	☐ No
I want to **allow** this employee to order checks.	Allow?	☐ Yes	☐ No
I want to **allow** this employee to download financial data.	Allow?	☐ Yes	☐ No

Step #3: Account Management

This section allows you to configure if this employee can open new savings, checking, and certificate accounts in online banking, or if this employee can see and change contact information on the account such as address and corporate email address. For features you do want them to use, you can add an extra layer of security by requiring a confirmation code. By default everything is set to "No" or "not allowed."

I want to **allow** this employee to be able to open savings/checking accounts.	Allow?	☐ Yes	☐ No
	Confirmation code?	☐ Yes	☐ No
I want to **allow** this employee to be able to open certificates (CDs).	Allow?	☐ Yes	☐ No
	Confirmation code?	☐ Yes	☐ No
I want to **allow** this employee to be able to update account information. This permission allows this employee to see and update contact information, including address and corporate email address.	Allow?	☐ Yes	☐ No
	Confirmation code?	☐ Yes	☐ No
I want to **allow** this employee to be able to view e-Statements.	Allow?	☐ Yes	☐ No
I want to **allow** this employee to be able to vote. If a ballot is activated by the credit union, this permission allows this employee to vote for the membership.	Allow?	☐ Yes	☐ No
I want to **allow** this employee to be able to view the Secure Message Center. This permission allows this employee to read messages sent by the credit union or through automated processing. This includes notifications when security settings are changed. Read messages will purged after 30 days.	Allow?	☐ Yes	☐ No
I want to **allow** this employee to be able to change the statement style. If the statement style feature is activated by your credit union, this permission allows this employee to change the style of your statement to, for example, a large-print style.	Allow?	☐ Yes	☐ No

Step #4: Bill Pay Management

I want to **allow** this employee to access the login for bill pay.	Allow?	☐ Yes	☐ No
	Confirmation code?	☐ Yes	☐ No

Authorized Signature:

_____

Date:

_____