

# ONLINE BANKING

## A Step-By-Step Guide



Credit Union of  
Southern California  
*BUILDING BETTER LIVES*®

562.698.8326 | 866.287.6225 | CUSoCal.org

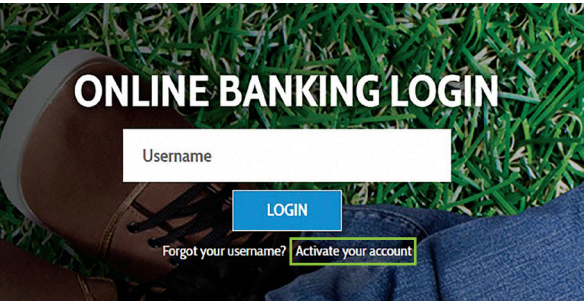
Set up your CU SoCal Online Banking service in six easy steps.



TO BEGIN...

Go to CUSoCal.org and click the upper right login button.

At the Online Banking Login, click “**Activate your account.**”



Register—**Enter your information**

Step 1 of 6

Account Number:	<input type="text"/>	typically 2-10 digits, primary account holder
Social Security Number:	<input type="text"/>	last 4 digits only—Example: 1234
Birthday:	<input type="text"/>	mm/dd/yyyy—Example: 05/31/1979
Accept:	<input type="checkbox"/>	Type <b>YES</b> to accept the following agreement(s): <ul style="list-style-type: none"><li>– <a href="#">CU OnLine Disclosure &amp; E-Sign Agreement</a></li><li>– <a href="#">Security information</a></li><li>– <a href="#">Privacy</a></li><li>– <a href="#">External Transfers Terms and Conditions</a></li></ul>

Start

Cancel

1

Input your **account number** (this is your CU SoCal Member number, not your ACH number), the last four digits of the primary Member’s Social Security Number, and their birth date.

Review the online agreements then type “**Yes**” to accept. Click “**Start**” to continue.

## Register—**Send** Registration Passcode

Step 2 of 6

Registration Passcode:

– Send Method –



For your security, a registration passcode is required to complete the registration process. This 6-digit passcode will be sent to your selected phone number or email. Once you receive this passcode, enter the 6 digits on the next page.

**NOTES:** – This passcode is valid for 10 minutes.  
– Text message passcodes are only valid for mobile phones.

Send Passcode

Cancel

## Register—**Confirm** Registration Passcode

Step 2 of 6

Registration Passcode:

For your security, a registration passcode is required to complete the registration process. This 6-digit passcode will be sent to your selected phone number or email. Once you receive this passcode, enter the 6 digits on the next page.

**NOTES:** – This passcode is valid for 10 minutes.  
– Text message passcodes are only valid for mobile phones.

Confirm Passcode

Cancel

2

From the drop-down menu, select the preferred method to receive your verification code (by email, text, or voice message). Click **“Send Passcode.”** Your passcode will arrive shortly.

**PLEASE NOTE:** You will have **10 minutes** to complete the online setup once you click **“Send Passcode.”** During this time, it is important that you do not navigate away from this page.

If you selected the email option to receive your passcode, please be sure to access your email by opening a second window or tab in your web browser.

After retrieving your passcode, input the six-digit number and click **“Confirm Passcode”** to continue.

Register—Setup your Username and Password

Step 3 of 6

Account Number: 0000

Last Name:

Setup Username:

[show username rules](#)

Setup Password:

[show password rules](#)

Confirm Password:

confirm your password matches!

Email:

Confirm Email:

matches!

Next

3

Enter your desired **Username** and **Password**. Please note the rules listed under “**show username rules**” and “**show password rules**.” Your email address must match the one that is listed on your account. If no email address is present, you may input an email address of your choice. When completed, “**matches!**” will appear next to both the “**Confirm Password**” and “**Confirm Email**” fields. Click “**Next**” to proceed.

Register—Setup your Security Questions

Step 4 of 6

Account Number: 0000

Username:

Last Name:

Security Question 1:

– Choose a question –



Answer:

Security Question 2:

– Choose a question –



Answer:

Security Question 3:

– Choose a question –



Answer:

Notes:

- Challenge Questions must be unique
- Challenge Answers are not case sensitive

Next

4

Choose three different security questions and type your corresponding answers. Click “**Next**” to continue. **NOTE:** You may want to record your answers and retain them in a safe place as you will be asked one of these three security questions each time you login from a new computer or have not selected the “**Remember This Computer**” option.



Account Number: 0000

Username:

Last Name:

Security Phrase:

A personal message—Example: Gone fishing

• Must not be blank

Security Picture:

Click on an image below to select your Security Picture.

• Must not be blank

More picture choices

[Previous](#) [Next](#)

[Random](#)



☐ Background



☐ KillerWhale



☐ CloseupLeaf



☐ OddFrog

Next

5

Think of a **security phrase** and select a **security image** that you would like to appear on the login screen each time you log in.

This security items indicate that you have correctly input your username and have not been redirected to an unsecure site. Should the phrase or image appear incorrectly, please stop and contact CU SoCal at 866.287.6225.

Click “**Next**” to continue.



Credit Union of  
Southern California

Enter this code XXXXXX in the box below to verify you can read Adobe Acrobat files.

Verification Code:

**Enroll in eStatements**

**Unable to View Code/Opt Out of eStatements\***

\*Paper statements are subject to the Schedule of Fees.

**6**

Enter the “**Verification Code**” to verify that you can read Adobe Acrobat files. Click “**Enroll in eStatements**” or “**Unable to View Code/Opt Out of eStatements\***.”

**Register—Setting up your Account—Please wait...**

**Working:** Please wait while we complete your setup.  
This may take up to 5 minutes to complete...



**You must complete the entire registration process.**  
If you do not complete the process, you will need to start over.  
**Please do not refresh or navigate away from this page.**

**FINISHED!**

**You have now completed the setting up your Online Banking account.** It may take a few minutes to finish processing.

**PLEASE NOTE:** If you forget your username, you may click the “**Forgot your username?**” link in the Home Banking portal on the CUSoCal.org home screen. Follow the onscreen instructions to retrieve it.

You may also call our phone center at 562.698.8326 Monday through Friday, 9 a.m. to 6 p.m., or Saturday, 9 a.m. to 1 p.m. A representative will be glad to assist you.