

Phone*Link User Guide

24-Hour Telephone Banking System

Getting Started

- Dial 800.634.3228 and select option 5, or internationally at 714.671.5701
- **First account signer who calls:**
When prompted, select the type of account you will use to log in. You will then be prompted to enter the account number, and then prompted to enter the last 4 digits of your Social Security Number followed by the pound (#) key. Choose a new access code between 4–8 digits and press the pound (#) key.
- **Additional account signers who call:**
When prompted, select the type of account you will use to log in. You will then be prompted to enter the account number. When prompted for your Access Code, enter the last 4 digits of your Social Security Number followed by the pound (#) key. Choose a new access code between 4–8 digits and press the pound (#) key.
- Once validated, you do not have to listen to the entire menu before making your selection. For expedited access to your account information, simply use the navigation keys summarized to the right.

Important Tips

- Dollar amounts need to be entered without a decimal point.
Example: Enter \$330.00 as 33000
- When entering a date: Enter 2 digits for the month, 2 digits for the day, and 2 digits for the year.
Example: Enter April 5, 2015 as 040515
- To ensure privacy, always keep your account number and Access Code separate and do not disclose this information to anyone.

If you have any questions about Phone*Link, or if we can be of further assistance, please call Member Services at **800.634.3228**, or internationally at **714.671.5705**. We can be reached Monday through Friday from 6:30 a.m. to 4:30 p.m. (Pacific Time).

Main Menu

1 Account and Funds Transfer

Select account to log in with:

- 1 Checking
- 2 Savings
- 3 Loan
- 4 Certificate or IRA

Choose Action

1 Inquire on accounts

Choose an account:

Checking or Savings

- 1 Balance information
- 2 Most **recent** withdrawals (5 at a time)
 - 1 Additional transactions
- 3 Most **recent** deposits (5 at a time)
 - 1 Additional transactions
- 4 Most recent ATM transactions (5 at a time)
 - 1 Additional transactions
- 5 Inquire on a specific transaction

Checking

- 1 By check number
- 2 By amount
- 3 By date

Savings

- 1 By amount
- 2 By date

- 6 Interest information
- 7 Transfer funds
- 8 Return to the previous menu

Loan Account

- 1 Balance information
- 2 Last payment date
- 3 Payment information
- 6 Interest information
- 8 Return to the previous menu

Certificate or IRA

- 1 Balance information
- 2 Last interest paid
- 3 Maturity date
- 4 Interest information
- 8 Return to the previous menu

3 Transfer funds

7 Change Access Code

2 Instructions on using the system

Navigation Keys

At any time while you are using Phone*Link, use the following navigation keys:

- 9 Press to **repeat the menu** you are currently using
- 0 Press to **contact** a Member Services representative or leave an after-hours message for the next business day.

