

2020 eDOC



Members Portal Guide



Core Image Processing — When Strategy Matters

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TRADEMARKS

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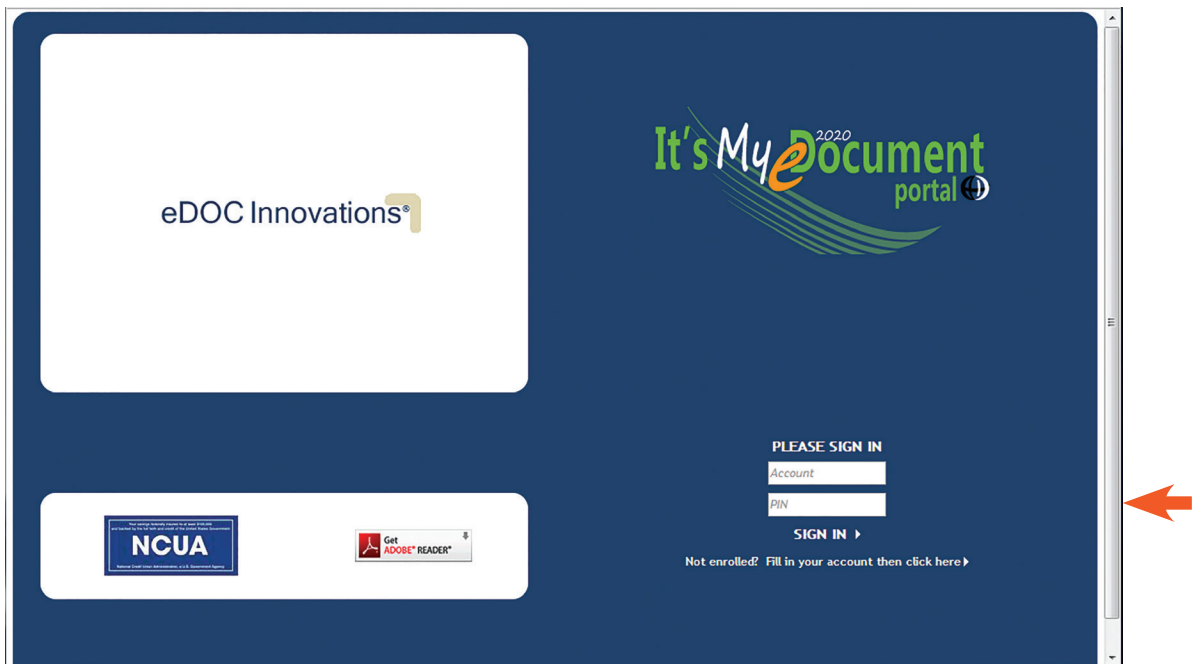
WELCOME TO 2020EDOC MEMBERS PORTAL

2020eDOC is an intuitive, easy to use, portal where credit union members can manage their accounts and documents, anytime from anywhere via a web browser. This version supports the following browsers: Safari, IE11, Firefox, and Chrome. If using a remote deposit service, such as eDOC Innovation’s Mobile Deposit or Merchant RDC, members also will be able to view the status of their mobile deposits. 2020eDOC is encrypted and secured with multi-level authentication to ensure that the credit union member is the only one with access to their most personal documents.

Sign In

The 2020eDOC portal can be accessed on a 24/7 basis from the member’s home-banking site or the credit union’s specific URL login page.

If enrolled, the portal will open to the main page of the website. Enter user name and password and click **Sign In**.



If not enrolled, the portal will redirect to an enroll screen where the member can enroll and then sign in.

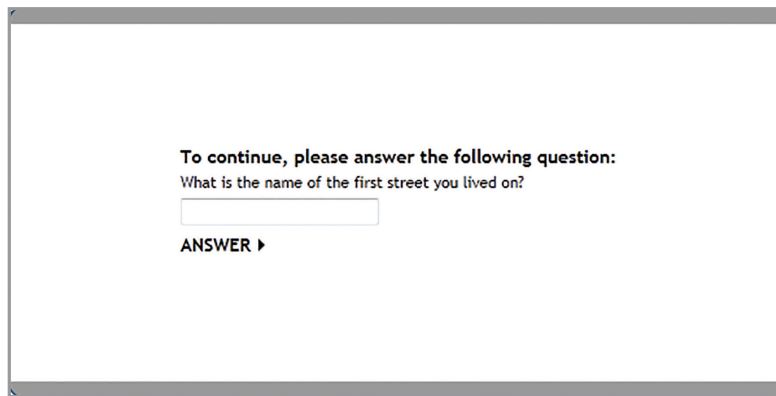
The text that will display is customized to you credit union specifics.

Security Questions

If logging in for the first time, a window will open requesting the member to add security questions until the minimum number has been reached.

For member security, after signing in, a validation window will pop up with one of the security questions the member has chosen at enrollment. (If fewer than the minimum number of security questions are on file, a request to answer new questions will open.)

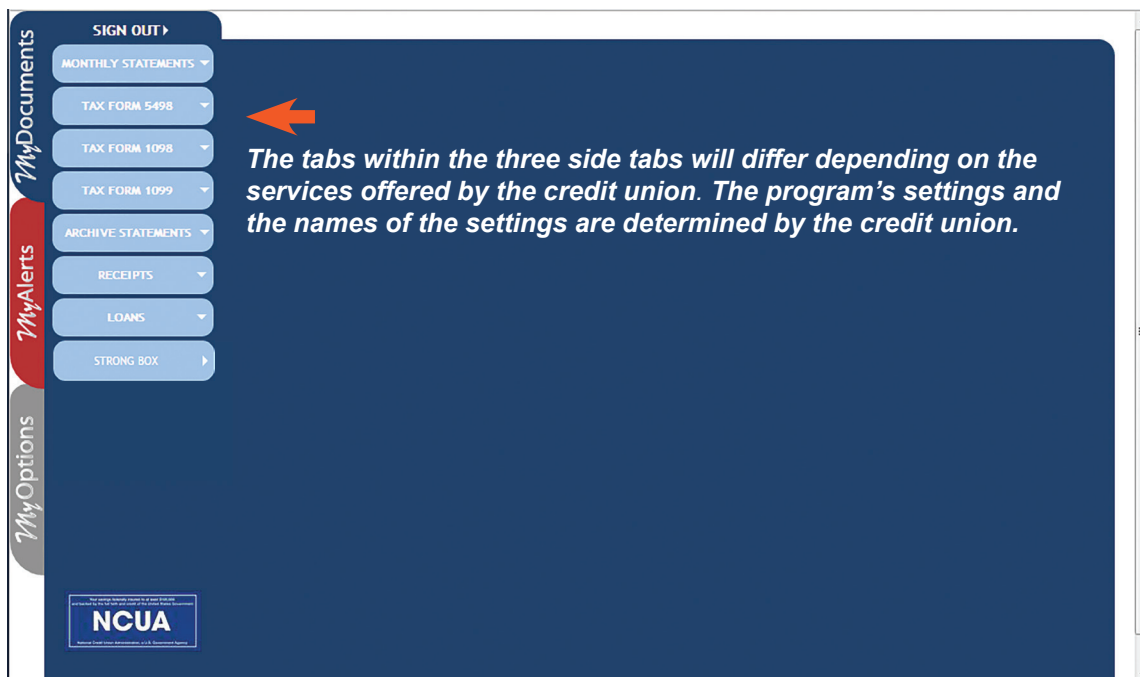
Enter the answer and click on **Answer**.



To continue, please answer the following question:
 What is the name of the first street you lived on?

ANSWER ▶

After signing in, the portal will open to display the main page with three work areas: **My Documents**, **My Alerts** and **My Options**. *Be aware that the tabs within these three categories differ depending on the services offered by the credit union.* If using a remote deposit service, such as eDOC Innovations' Mobile or Merchant RDC, an additional tab, MY DEPOSITS, may be available to view and check the status of mobile deposits.



The screenshot shows a dark blue sidebar with three main categories: **My Documents**, **My Alerts**, and **My Options**. Under **My Documents**, there are tabs for SIGN OUT, MONTHLY STATEMENTS, TAX FORM 5498, TAX FORM 1098, TAX FORM 1099, and ARCHIVE STATEMENTS. Under **My Alerts**, there are tabs for RECEIPTS, LOANS, and STRONG BOX. Under **My Options**, there is a tab for STRONG BOX. A red arrow points to the TAX FORM 1098 tab. A text box on the right states: *The tabs within the three side tabs will differ depending on the services offered by the credit union. The program's settings and the names of the settings are determined by the credit union.* At the bottom of the sidebar is the NCUA logo.

MY DOCUMENTS

The **My Documents** tab opens to a list of sub tabs determined by the institution. These tabs will open windows that allow access to documentation information.

Statements

One or more **STATEMENT** tabs may be available for each account a member may have. Click on the statement tab to show a list of statement dates for that account. Click on a date to display that statement.

STATEMENT OF ACCOUNT

Member No.	Statement Period	Page
2020-0-0	08/01/11 08/31/11	1

John Does
2425 Hilldale Road
California, TX 77101-2425

eDOC INNOVATIONS
380 East Main St
Midway, UT 84049

Send Inquiries To:
380 East Main St * Midway, UT 84049
800-425-7766 * www.edoclogic.com


Transaction Date	Effective Date	Description of Transactions	Transaction Amount	Balance
08/01	ID 0000	MOON CLUB SAVINGS Beginning Balance		33499.56
Joint Owner: Jane Does				
08/28		Ending Balance		33499.56
		Dividends Paid Year to Date	25.32	
08/01	ID 0010	MOON CLUB CHECKING Beginning Balance		55398.15
Joint Owner: Jane Does				
08/01		Deposit Dividend 0.200%	5.03	55403.18
Annual Percentage Yield Earned 0.20% from 08/01/11 through 08/31/11				
Based on Average Daily Balance of 14,122.85				
08/01		Deposit ACH TEXAS COMPTROLLER	4939.42	60342.60
TYPE: TRSANNUITY ID: 187234560 CO: Wilma Smith				
08/01		Check 001053 Tracer 0000000000	130.35	60092.60
08/02		Withdrawal Debit Card Debit Signature	17.18	60075.42
08/02		08/02 003326126849005809 5912 CVS PHARMACY #1254 Q03 Bedrock Lanes TX	25.00	60050.42
08/02		Withdrawal Debit Card Debit Signature		57550.42
08/02		08/02 003329126849005816 5912 CVS PHARMACY #1254 Q03 Bedrock Lanes TX	654.60	56895.82
08/02		Withdrawal Debit Card Debit Signature		56241.22

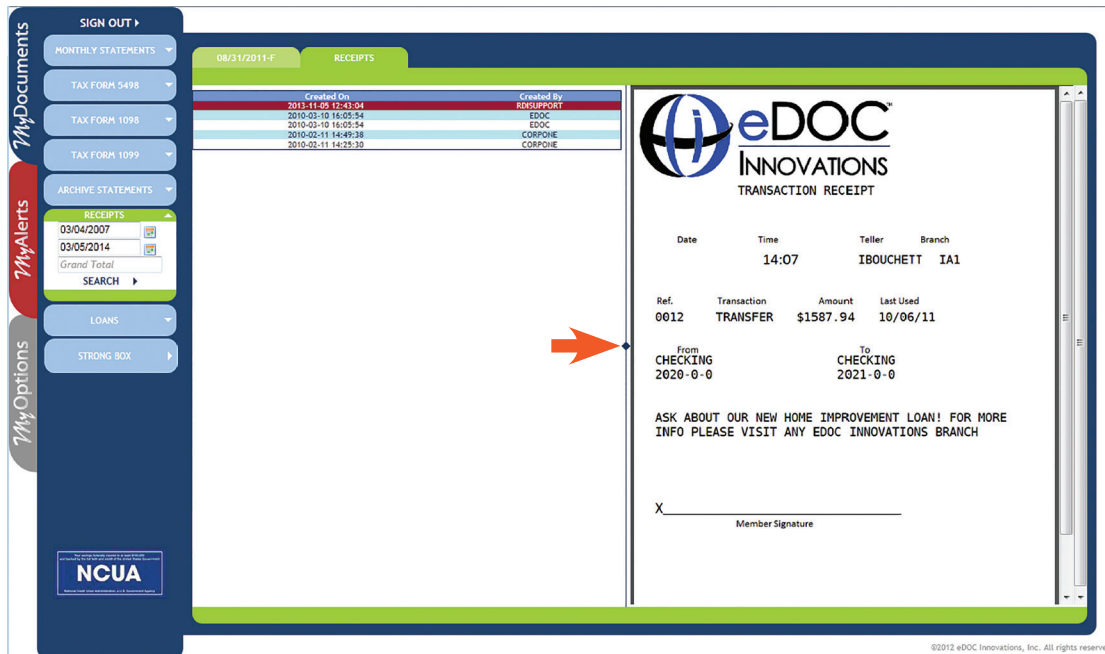
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There are three pages to the statement above, shown as [1] [2] [3]. Clicking on the bracketed number will take the member to that page. Members may view pages as a pdf file [PDF], rich text [TXT]. The email [EMAIL] link is optional and requires specific configuration and member prerequisites. If this is an option, statement can be emailed by clicking on the [EMAIL] button.

Receipts

The **RECEIPTS** tab will search documents with date criteria. Enter the dates to be searched and click **Search**. The list of items that match the search criteria will display in the right window. Double clicking on an item in the left column will open that item in the right hand column.

Clicking on the arrow symbol in the center of the two windows  will open either side in full view.



MyDocuments

SIGN OUT ▾

MONTHLY STATEMENTS ▾

TAX FORM 5498 ▾

TAX FORM 1098 ▾

TAX FORM 1099 ▾

ARCHIVE STATEMENTS ▾

MyAlerts

RECEIPTS

03/04/2007

03/05/2014

Grand Total

SEARCH ▶

LOANS ▾

STRONG BOX ▶

MyOptions

NCUA

08/31/2011-F RECEIPTS

Created On	Created By
2013-11-09 12:43:04	RDRSUPPORT
2010-03-10 16:05:54	EDOC
2010-03-10 16:05:54	EDOC
2010-02-11 14:49:38	CORPONE
2010-02-11 14:25:30	CORPONE

eDOC INNOVATIONS
TRANSACTION RECEIPT

Date: 10/06/11 Time: 14:07 Teller: IBOUCHETT Branch: IA1

Ref.	Transaction	Amount	Last Used
0012	TRANSFER	\$1587.94	10/06/11

From: CHECKING 2020-0-0 To: CHECKING 2021-0-0

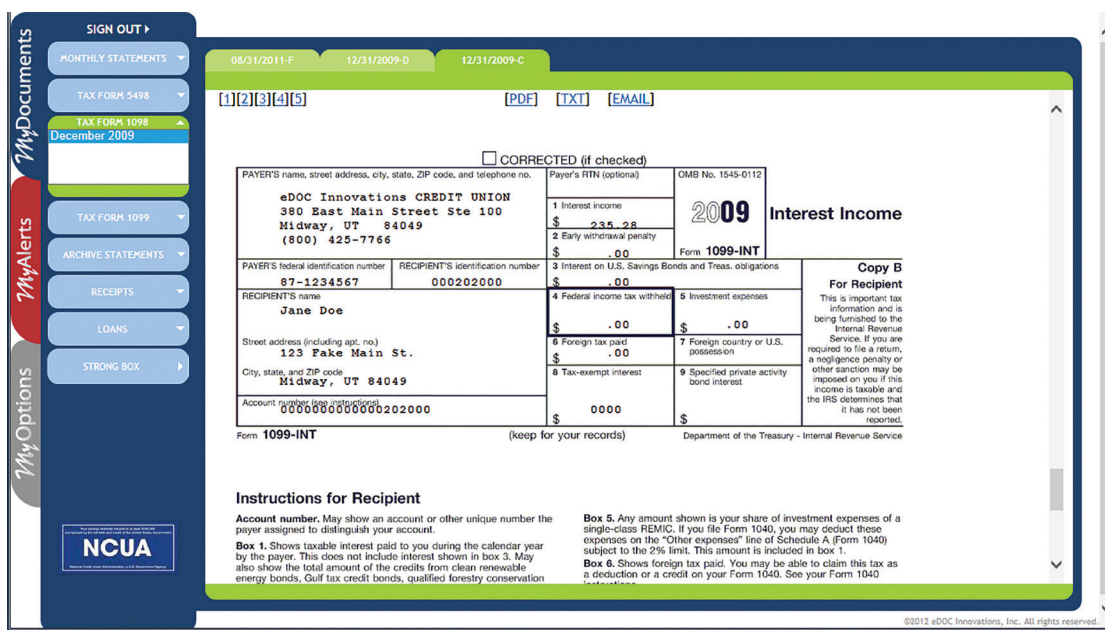
ASK ABOUT OUR NEW HOME IMPROVEMENT LOAN! FOR MORE INFO PLEASE VISIT ANY EDOC INNOVATIONS BRANCH

X _____
Member Signature

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Tax Forms

Like Statements, if available, there may be more than one tab for **TAX FORMS**.



MyDocuments

SIGN OUT ▾

MONTHLY STATEMENTS ▾

TAX FORM 5498 ▾

TAX FORM 1098 ▾
December 2009

TAX FORM 1099 ▾

ARCHIVE STATEMENTS ▾

MyAlerts

RECEIPTS

LOANS ▾

STRONG BOX ▶

MyOptions

NCUA

08/31/2011-F 12/31/2009-D 12/31/2009-C

[1] [2] [3] [4] [5] [PDF] [TXT] [EMAIL]

CORRECTED (if checked)

PAYER'S name, street address, city, state, ZIP code, and telephone no.
eDOC Innovations CREDIT UNION
380 East Main Street Ste 100
Midway, UT 84049
(800) 425-7766

Payer's RTN (optional)
1 Interest income \$ 235.28
2 Early withdrawal penalty \$.00

OMB No. 1545-0112
2009 Interest Income
Form 1099-INT

PAYER'S federal identification number: 87-1234567
RECIPIENT'S identification number: 000202000

3 Interest on U.S. Savings Bonds and Treas. obligations \$.00

4 Federal income tax withheld \$.00
5 Investment expenses \$.00

RECIPIENT'S name: Jane Doe
Street address (including apt. no.): 123 Fake Main St.
City, state, and ZIP code: Midway, UT 84049

6 Foreign tax paid \$.00
7 Foreign country or U.S. possession

8 Tax-exempt interest \$ 0000
9 Specified private activity bond interest

Account number: 0000000000000202000

Form 1099-INT (keep for your records) Department of the Treasury - Internal Revenue Service

Copy B For Recipient
This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Instructions for Recipient

Account number. May show an account or other unique number the payer assigned to distinguish your account.

Box 1. Shows taxable interest paid to you during the calendar year by the payer. This does not include interest shown in box 3. May also show the total amount of the credits from clean renewable energy bonds, Gulf tax credit bonds, qualified forestry conservation


Box 5. Any amount shown is your share of investment expenses of a single-class REMIC. If you file Form 1040, you may deduct those expenses on the "Other expenses" line of Schedule A (Form 1040) subject to the 2% limit. This amount is included in box 1.

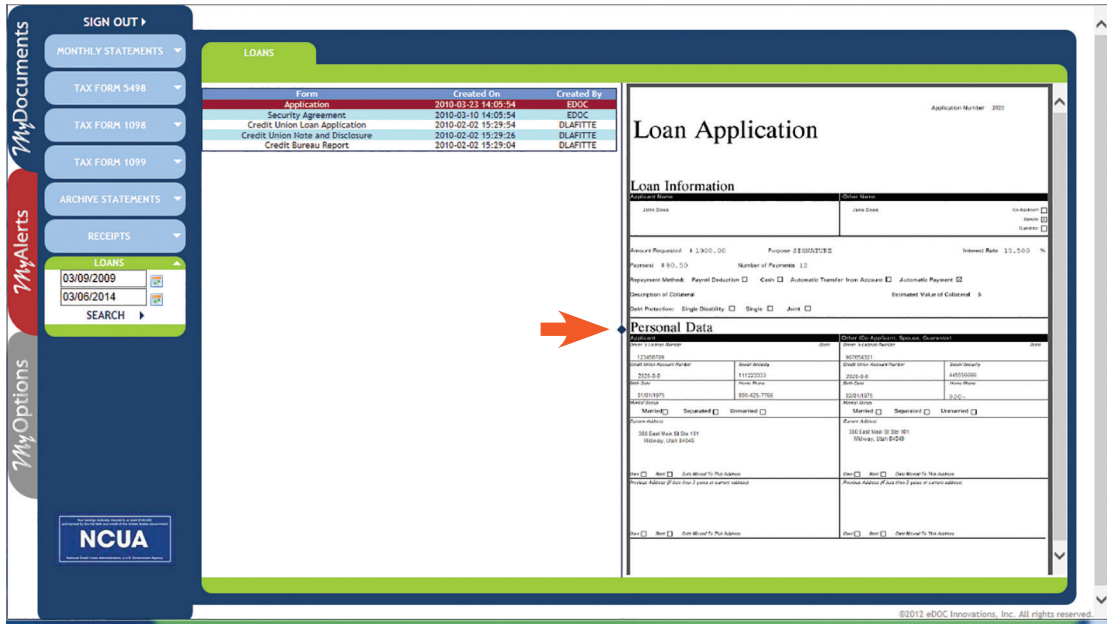
Box 6. Shows foreign tax paid. You may be able to claim this tax as a deduction or a credit on your Form 1040. See your Form 1040.

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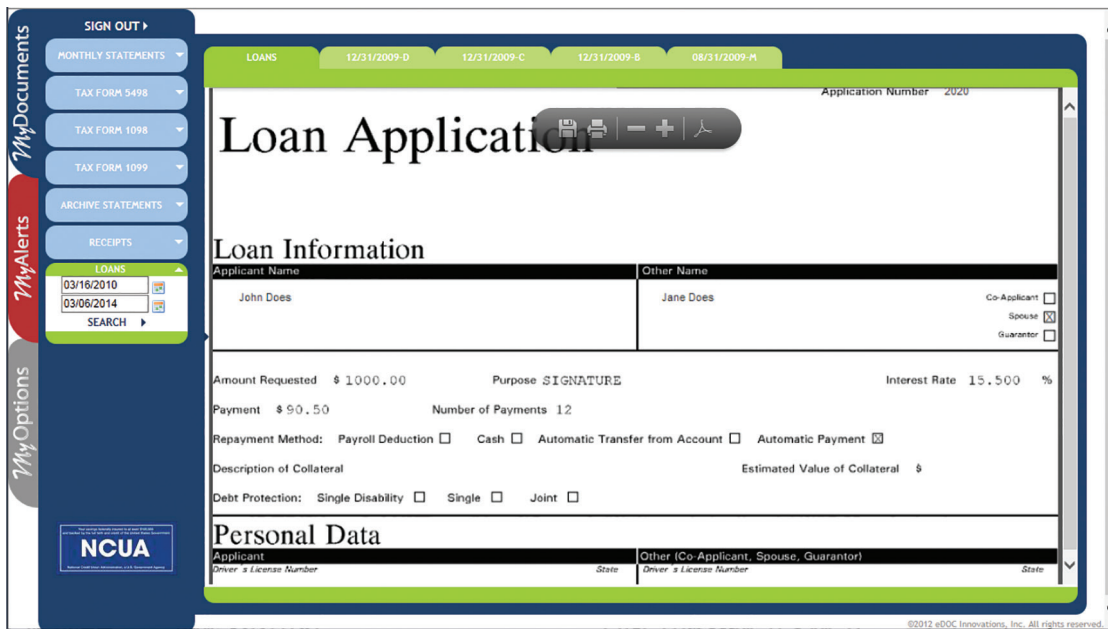
Loans

The **LOANS** tab will take the member to any loan documents the CU has allowed for online viewing. The window will open with a list of these loans to the left. Clicking on a loan on the left will open that loan in the right hand side of the window.

Clicking on the arrow symbol in the center of the two windows  will open either side in full view.



Hovering over the top center of the document will show PDF controls where member can print, save, and zoom in or out of the document.



Remote Deposit Tabs

If a member is depositing checks via one of eDOC Innovations' remote deposit services (Mobile or Merchant RDC), the **MY DEPOSITS** tab will be available to check and view the status of remote deposits.

My Deposits

Clicking on **MY DEPOSITS** displays a list of daily deposit totals from the date range at the top of the page. The default range is the current day and the day before. Enter the dates in the boxes to be searched and click **GO**. The screen will display the daily deposits for that date range.

The screenshot shows the 'My Deposits' section of the portal. At the top, there are search filters: 'Retrieve Daily Totals from 03/07/2010 to 03/05/2014' with a 'GO' button. Below this is a list of dates with corresponding deposit completion counts:

Date	Deposits Completed
Jan 29, 2014	0/6 Deposits Completed
Dec 23, 2013	0/2 Deposits Completed
Oct 17, 2013	0/1 Deposits Completed
Sep 06, 2013	0/1 Deposits Completed
Aug 28, 2013	0/1 Deposits Completed
Jun 01, 2013	0/1 Deposits Completed
May 22, 2013	0/3 Deposits Completed
May 09, 2013	0/2 Deposits Completed
May 06, 2013	0/1 Deposits Completed
May 02, 2013	0/7 Deposits Completed

On the left side, there is a navigation menu with categories: MyDocuments, MyAlerts, and MyOptions. The 'MY DEPOSITS' option is highlighted. The NCUA logo is visible at the bottom left.

Click on **Retrieve Deposit Information** in the middle of the page to view the deposited items in the selected date range.

This screenshot shows the same 'My Deposits' page, but with a detailed status table for the date 'Jan 29, 2014'. The table has three columns: Status, Count, and Amount.

Status	Count	Amount
Not Reviewed	0	5.00
Rejected	0	5.00
Not In Batch	0	5.00
In Process	6	\$1,923.36
Completed	0	5.00
Total	6	\$1,923.36

Below the table is a link labeled 'Retrieve Deposit Information' with a right-pointing arrow. A red arrow from the right side of the page points to this link. The rest of the page layout, including the search filters and the list of dates, remains the same as in the previous screenshot.

Clicking on any item in the list will display the front and back images of the item in the right window. Hover the mouse over the check image and PDF functions will be available.

Members who have CheckLogic Lite Merchant RDC (remote deposit capture) will have a **Make a Deposit** tab as seen in the figure below. To download a Checklogic Lite Merchant RDC user manual go to: <http://edoclogic.com/wp-content/uploads/Merchant-RDC-User-Guide1.pdf>

08/31/2011-F RECEIPTS MyDeposits

Retrieve Daily Totals from 03/07/2010 to 03/05/2014 GO

(Click on a date to view detailed information for that day's Deposits)

Jan 29, 2014

Status	Count	Amount
Not Reviewed	0	\$0.00
Rejected	0	\$0.00
Not In Batch	0	\$0.00
In Process	6	\$1,923.36
Completed	0	\$0.00
Total	6	\$1,923.36

Check #	Amount	Status	Reject Reason	Reject Explanation
4017	\$50.00	Submitted		
4153	\$18.00	Submitted		
4154	\$420.11	Submitted		
0000154	\$40.00	Submitted		
4152	\$7.48	Submitted		
4214	\$777.77	Submitted		

Dec 23, 2013	0/2 Deposits Completed
Oct 17, 2013	0/1 Deposits Completed
Sep 06, 2013	0/1 Deposits Completed
Aug 28, 2013	0/1 Deposits Completed
Jun 01, 2013	0/1 Deposits Completed
May 22, 2013	0/3 Deposits Completed
May 09, 2013	0/2 Deposits Completed

Check Status Definitions

Uploaded	The check was successfully uploaded.
Valid_Acct	The check came from a valid account.
Valid_Img	The check image is the correct size and type and is ready for automated amount recognition and image quality analysis.
Valid_IQA	The check passed image quality analysis.
Rdy_Review	The check is ready for review by a teller.
Dat_Repair	The check MICR has been repaired by a teller.
Rdy_Batch	The check has been approved by a teller and is ready for submission into a check batch.
In_Batch	The check has been put into a Check 21 batch.
Imported	The check batch has been successfully imported.
Batch_Rvw	The check has exceeded certain security requirements and must be reviewed by a manager.
Rdy_Submit	The check is waiting to be prepared for Check 21 electronic clearing.
Assembling	The check is being prepared for Check 21 electronic clearing.
Submitted	The check has been submitted to the Check 21 network for clearing.
ICL_Reject	The check has been rejected by a member of the Check 21 clearing network.
Completed	The check has been successfully submitted to the Check 21 network for clearing. NOTE: The check may still be returned by the paying institution for reasons such as Insufficient Funds.
Img_Repair	The check failed image processing and will be rejected or corrected and resubmitted for image processing.
Rejected	The check has been rejected. Please see the reject reason for more information.

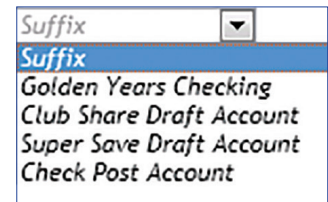
Reasons for Rejection

Duplicate	The check appears to be a duplicate of a previously scanned check.
Invalid_Account	The check was submitted for a non-existent account or one that does not have remote deposit authority.
Invalid_MICR	The magnetic ink on the bottom of the check was not read properly. The check needs to have the magnetic ink characters repaired or entered manually.
Over_Max_Amount	The check amount exceeds the permitted amount to be deposited remotely without a Bank Secrecy Act security review.
Zero_Amount	The check has a zero amount. The courtesy and/or legal amounts were incorrect read or the check has an invalid zero dollar amount.
Invalid_Image_Size	The image is too large or too small to be a valid check.
File_Not_Found	The check image file is missing.
CAR_LAR_Failed	Check courtesy and legal amount automated recognition failed. A financial institution staff member will need to manually enter the correct legal amount.
IQA_Failed	The check image quality analysis failed.
Not_USA_Check	The check does not appear to be a check drawn from a U.S. Institution. It is either a foreign check or the magnetic ink on the bottom of the check was read incorrectly.
Bad_Image	The check image is bad. The check will need to be re-scanned with a better quality image.
Forgery	The check has been flagged as a possible forgery.
Other	The check was rejected for a reason other than those listed above. Additional information should be available in the reject explanation.

Checks

The **CHECKS** tab, if available, allows a member to search for checks based on check number, amount, or date range.

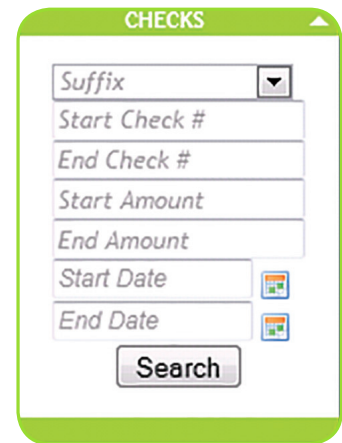
If the financial institution uses multiple sub-accounts, or suffixes, the **Suffix** dropdown selection box will appear. Choose the suffix for the search criteria.



When performing the **Search**, if the message below appears it means the wrong sub-account from the dropdown list has been selected. Select the correct check type and perform the **Search** again.

Account number not found – sub-account selection may be incorrect

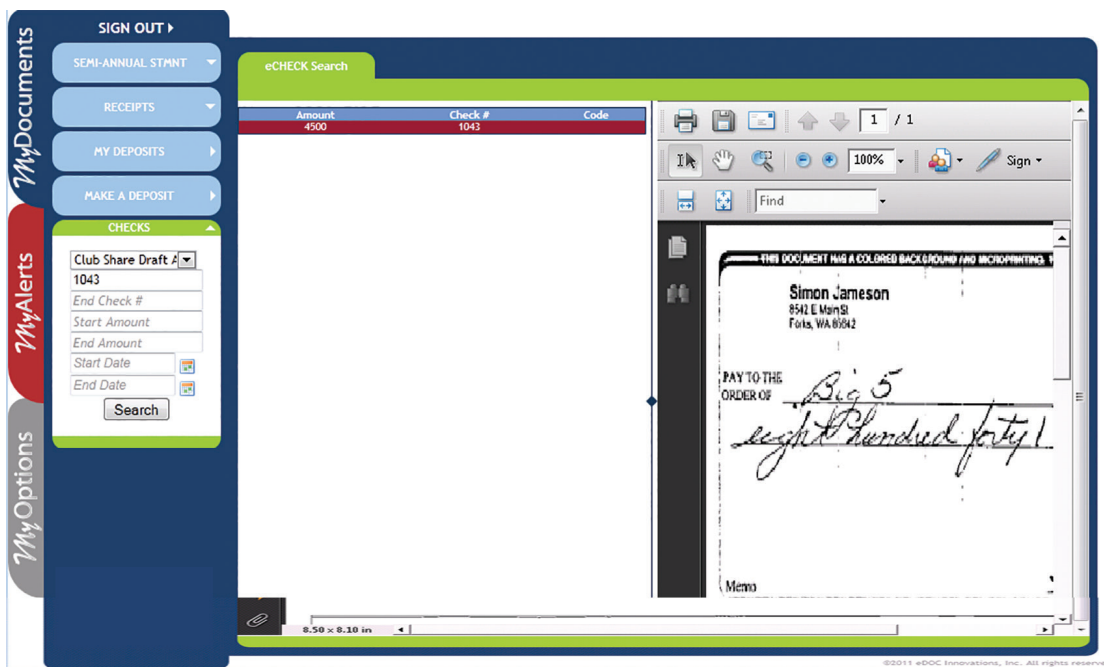
Searches for checks can use any combination of check number, amount, or date. Items matching the search criteria display in a list on the left. The selected item displays on the right.



If searching by check number, enter the low and high check numbers in the **Start Check #** and **End Check #** fields respectively. If searching for a single value, enter it in either field.

If searching by amount, enter the low and high amounts in the **Start Amount** and **End Amount** fields respectively. If searching for a single value, enter it in either field.

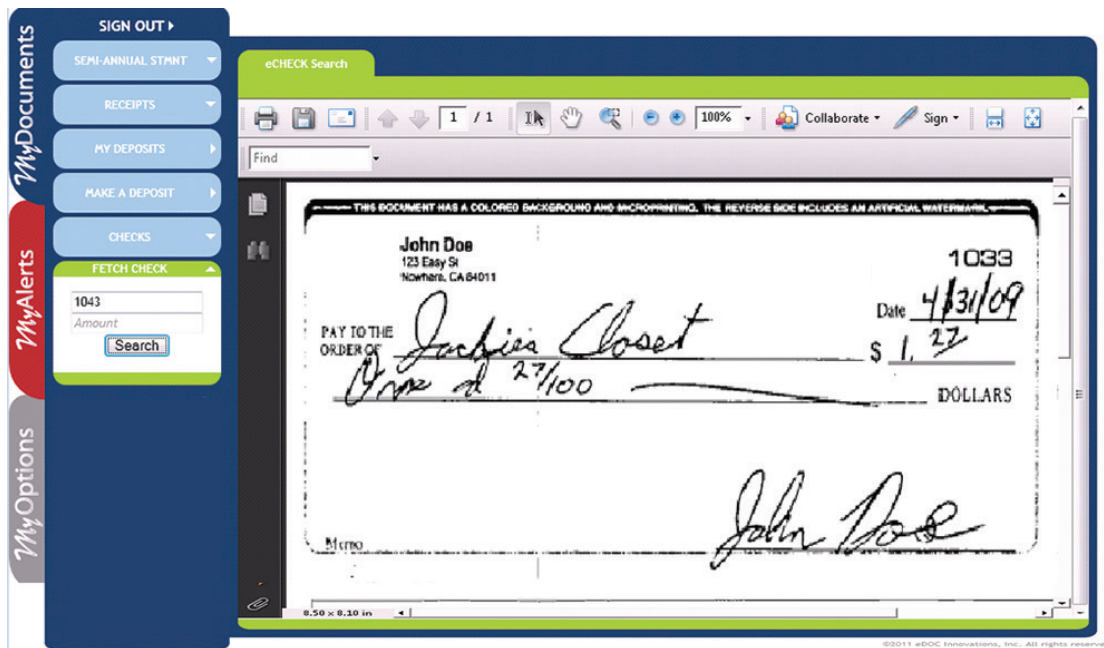
If searching by date range, enter the oldest and newest dates in the **Start Date** and **End Date** fields respectively. If only a Start Date is entered, the End Date will default to today's date.



Fetch Checks

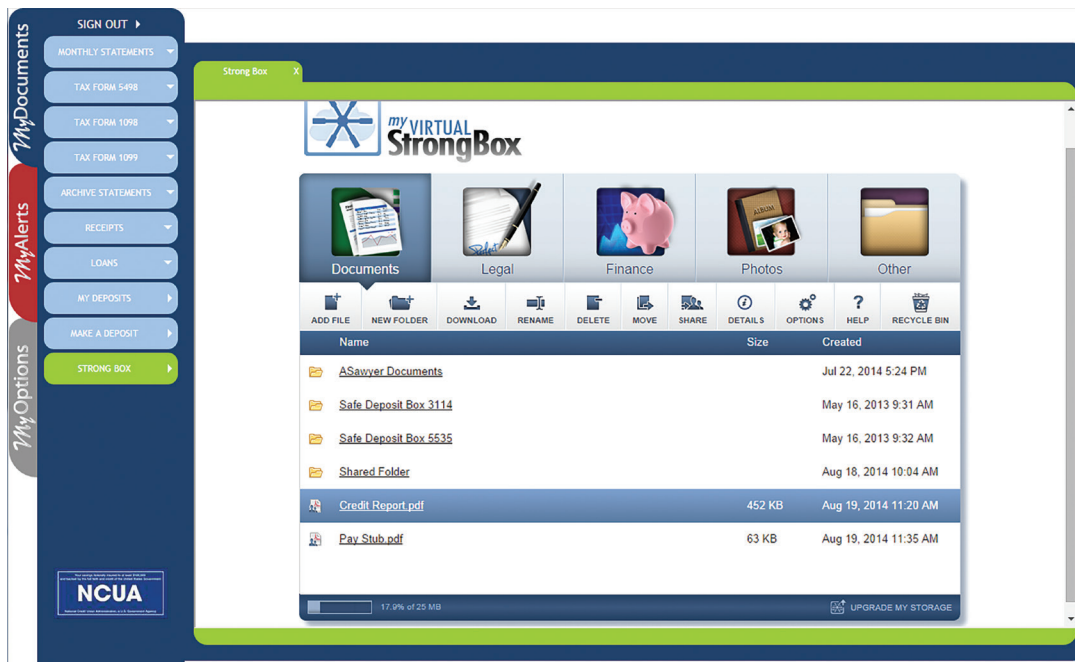
Some financial institutions will not have the capability to search for check items, but may have the ability to retrieve and display items if the item number, amount, date, etc. is known. The specific information required will depend on the financial institution.

Click on the **Fetch Check** tab, if available, and enter the required data and click **Search**. It may take several seconds to retrieve the item.



My Virtual Strongbox

My Virtual Strongbox is a simple online application that safely stores important files, such as wills, mortgages, tax documents, insurance policies and more. The application is more practical than a safe deposit box and safer than a cloud storage service. My Virtual StrongBox is the perfect blend of online convenience and safe deposit security.

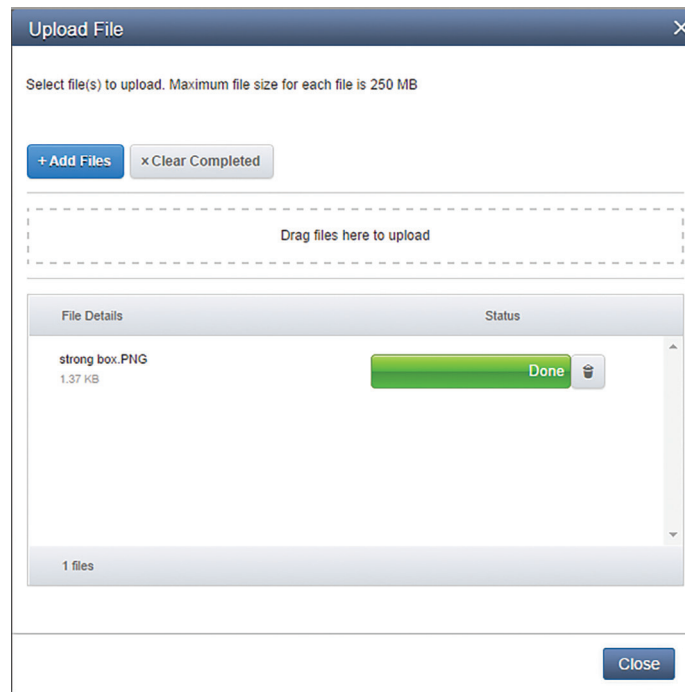


The My Virtual StrongBox toolbar includes the following options:

- **ADD FILE:** Upload files from computer to the currently selected folder.
- **NEW FOLDER:** Creates a new sub-folder with a custom name in the currently selected folder.
- **DOWNLOAD:** Download files from the currently selected folder onto your computer.
- **RENAME:** Change the name of a file that was previously uploaded.
- **DELETE:** Move one or more items from the current folder into the Recycle Bin. Files in the Recycle Bin still count against available space until they are removed permanently.
- **MOVE:** Move one or more items from their current folder to a different folder or sub-folder.
- **SHARE:** Share file(s) by sending a link to that file via e-mail.
- **DETAILS:** View detailed file information for a selected file.
- **OPTIONS:** View or Change Settings and Security.
- **HELP:** Displays the User's Guide.
- **RECYCLE BIN:** This folder contains all deleted items. Deleting folder and files from the Recycle Bin will remove them permanently from My Virtual StrongBox.
- **RESTORE:** This option is only available from the Recycle Bin and restores folders and files to their previous location.

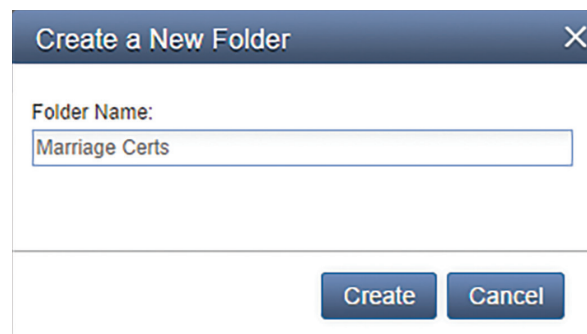
Add Files

Choose a folder locations from Documents, Legal, Finance, Photos, or Other to add files. Click the **Add Files** button. In the **Upload File** window, click **Add Files** and choose the file to upload or **Drag files here to upload**. A status bar will show the progress of the upload. When finished, click **Close** and the file will upload to the selected folder. To delete the uploaded file, click on the trash can next to the **Status** bar. To view the contents of a file, click the file or click **Download** and follow the prompts.



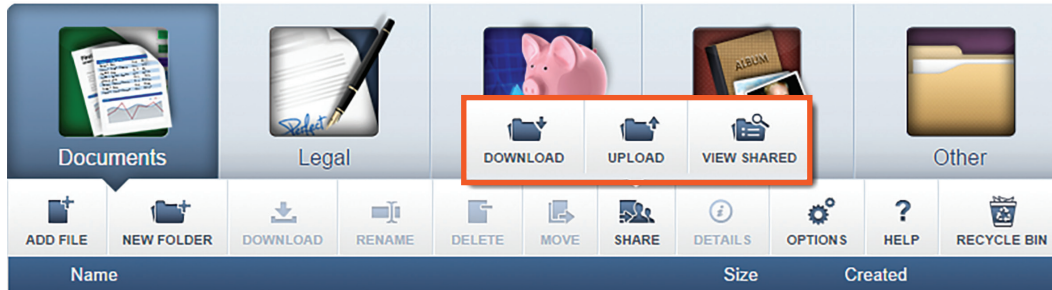
Create New Folders

Choose a folder locations from Documents, Legal, Finance, Photos, or Other for the New Folder. Click on **New Folder** from the toolbar. **Create a New Folder** window will pop up. Name the folder and click **Create**. The new folder is now added to that destination.



Share Files

To share a file from the currently selected folder, select the file and click **Share** from the toolbar. A pop up window will display the File Share Link options.



Create File Upload Link

Folder Name: Legal

Add Upload Link

Upload Options: One-Time Multiple

Expiration Options: 1 days (0 = Never expires)

Upload Code: (Optional)

Create Upload Link

Active Upload Links

Remove Link

Upload Link: <https://handlers.myvirtualstrongbi> Copy Link

Upload Type: One-Time

Expiration: Expires Oct 3, 2014 9:29 AM

Upload Code: (Not required)

Activity: 0 uploads

Done

Create Folder Download Link

Documents

Add Download Link

Expiration Options: 1 days (0 = Never expires)

Download Code: (Optional)

Create Download Link

Active Download Links

Remove Link

Share Link: <https://handlers.myvirtualstrongbi> Copy Link

Download Type: Multiple

Expiration: Link has expired

Download Code: 1234

Activity: 0 downloads

Done

One-time: The file share link is good for only one download before the expiration date/time is reached.
Multiple: The recipient(s) of the file share link may download the file multiple times until the expiration date/time is reached.

Expiration sets the number of days the share link will be available for the recipient(s) to retrieve the shared file. The default is 1 day; however, the number may be changed from 0 - 365. The file will not be available for download after the last day selected from the time it was created.




NOTE: A value of zero (0) will make the file always available for download. If the multiple download option are selected, the file share link will always be valid until it is manually removed from the system.

The file share link can be sent to anyone by selecting **Copy Link** (or swipe and copy) and then pasting the URL into an email. To remove an Active Share Link once it has been created, click on **Remove**.





NOTE: Once a file share link is created it cannot be edited. To adjust options for the active share link, remove the current link and generate a new one. For added protection, password protect or encrypt the file before uploading to My Virtual StrongBox..

View All Shared Items
✕

Upload Share Links

Name	Type	Uploads	Expiration Date	
 Documents	One-Time	0	Aug 17, 2013 3:26 PM	Remove
 Documents	One-Time	0	Oct 3, 2014 9:24 AM	Remove
 Up to parent folder	One-Time	0	Aug 2, 2013 12:16 PM	Remove

Download Share Links

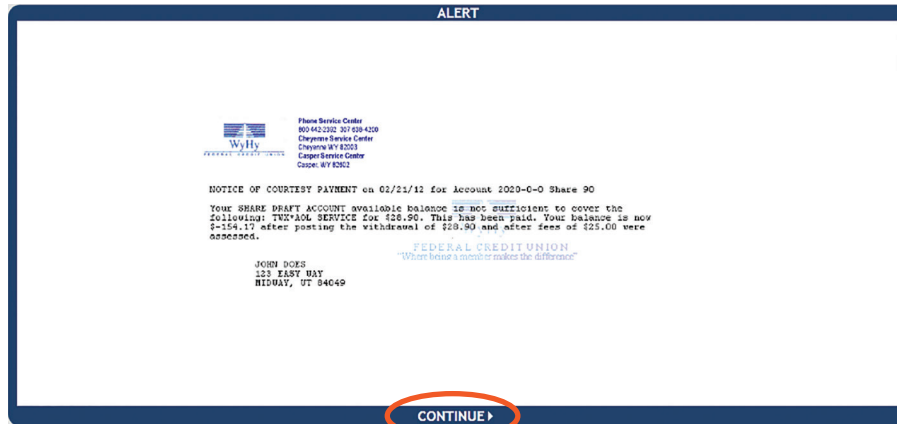
Name	Type	Downloads	Expiration Date	
 Documents	Multiple	0	Aug 19, 2014 10:05 AM	Remove
 Credit Report.pdf	Multiple	0		Remove
 Credit Report.pdf	One-Time	0	Aug 28, 2014 10:26 AM	Remove
 mgccapp.zip	One-Time	1	Jul 30, 2014 3:48 PM	Remove

Done

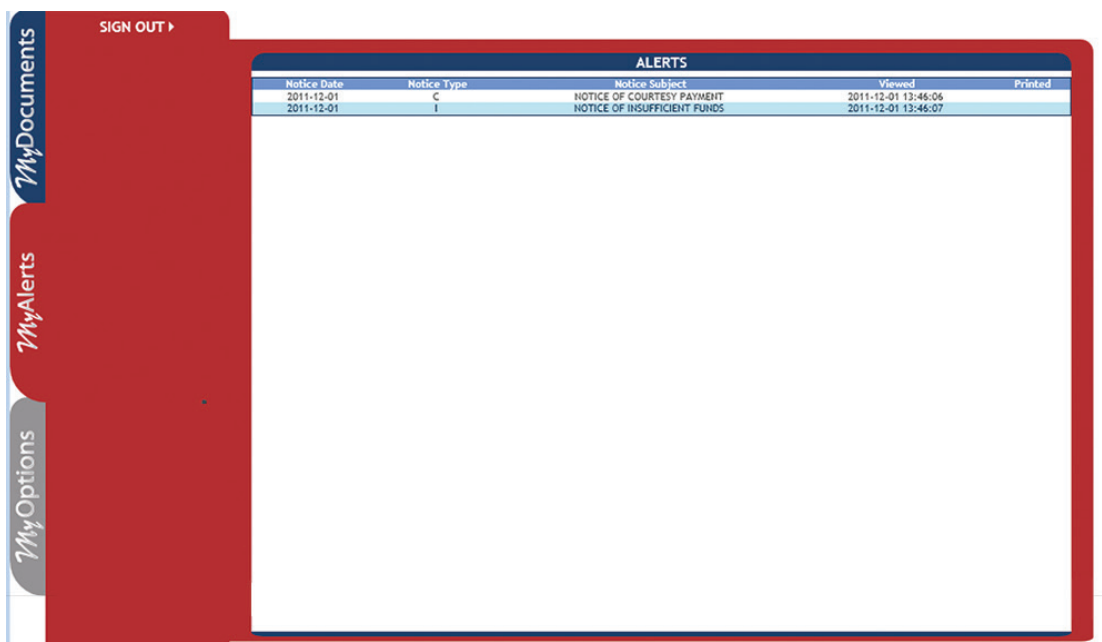
MY ALERTS

Alerts notify members of important information about their account (ie, late fees, non-sufficient funds, etc.) If there are new alert messages, they will display immediately after logging in.

After reading the message, click **CONTINUE** at the bottom of the screen.



To view previous alert messages, click on the **My Alerts** tab. The tab will display the alerts for the last 30 days. Click on an item to view the message.



MY OPTIONS

The My Options tab stores personal information and allows the member to change information about their account, such as an email address, PIN, and preferences relative to receiving statements and messages. The fields that appear will depend on the services offered by the financial institution. If two email address fields appear, only one is required. If a member wants their statements and notices sent to more than one email address, fill in both address fields.

My Profile

Click **Unenroll** to unenroll. Once the member clicks this button, the member will be logged out of the system, and will not be able to log back in until re-enrolled.

The screenshot displays the 'MY PROFILE' page with the following fields and options:

- First Name:** John
- Last Name:** Smith
- SSN:** 111-22-2020
- Address:** 1197 Exchange Street
- Apt/Building:** (empty)
- City:** Middlebury
- State:** VT
- Zip:** 05753 - (empty)
- PIN:** (masked with six dots)
- Email:** (empty)
- Email2:** (empty)

Communication preferences (checkboxes):

- Include information about products and services
- Only send me a notice when my statement is ready to view on-line.
- Only send me a paper statement.
- Send me a paper statement in addition to my electronic statement.
- Include check images with my statement.

Buttons: Update, Unenroll

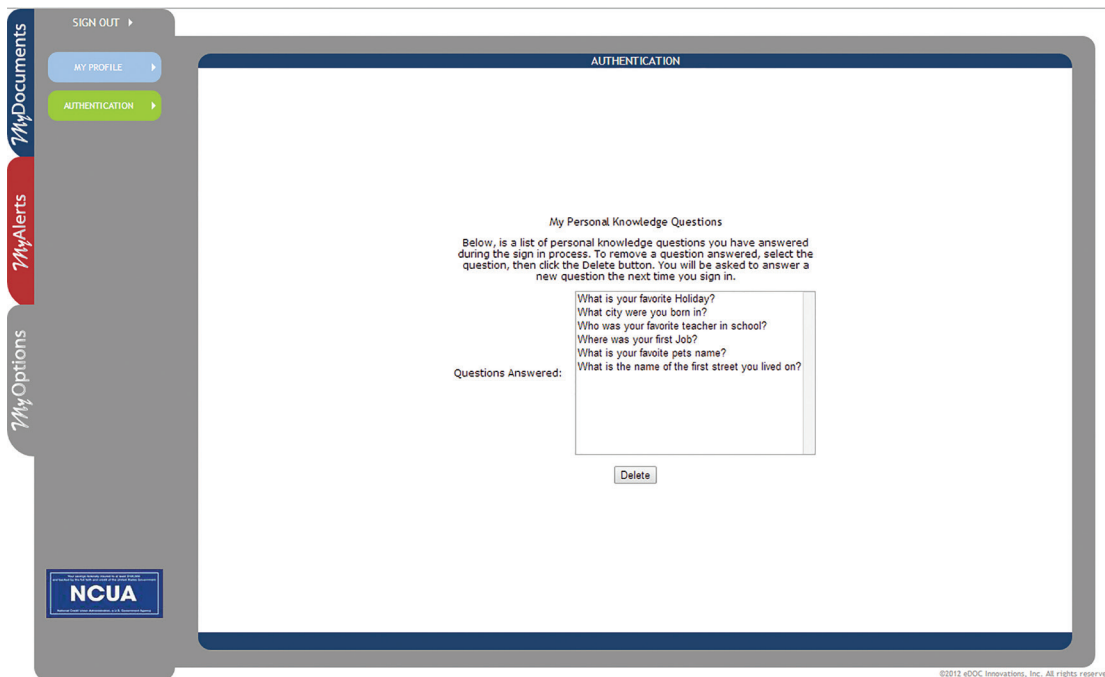
Text: Unenroll From Online Documents. If you choose to unenroll, you will no longer be able to access online documents.

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Authentication

The Authentication tab contains personal knowledge questions that are asked at enrollment and log in. The financial institution will choose the number of security questions maintained in the database. If there are fewer questions than required, members will be asked to add new questions at log in. These newly answered questions will then be added to the database.

When logging in for the first time, the member will continue to be asked to add new security questions until the minimum number has been reached (typically three or four). A specific question also may be removed by highlighting the question and clicking **Delete**.



Sign Out

To log off, click on **SIGN OUT** from any tab in use. Signing out will return the member back to the landing page. Sign back in or exit the program.



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