



# Online & Mobile Banking Enrollment Guide

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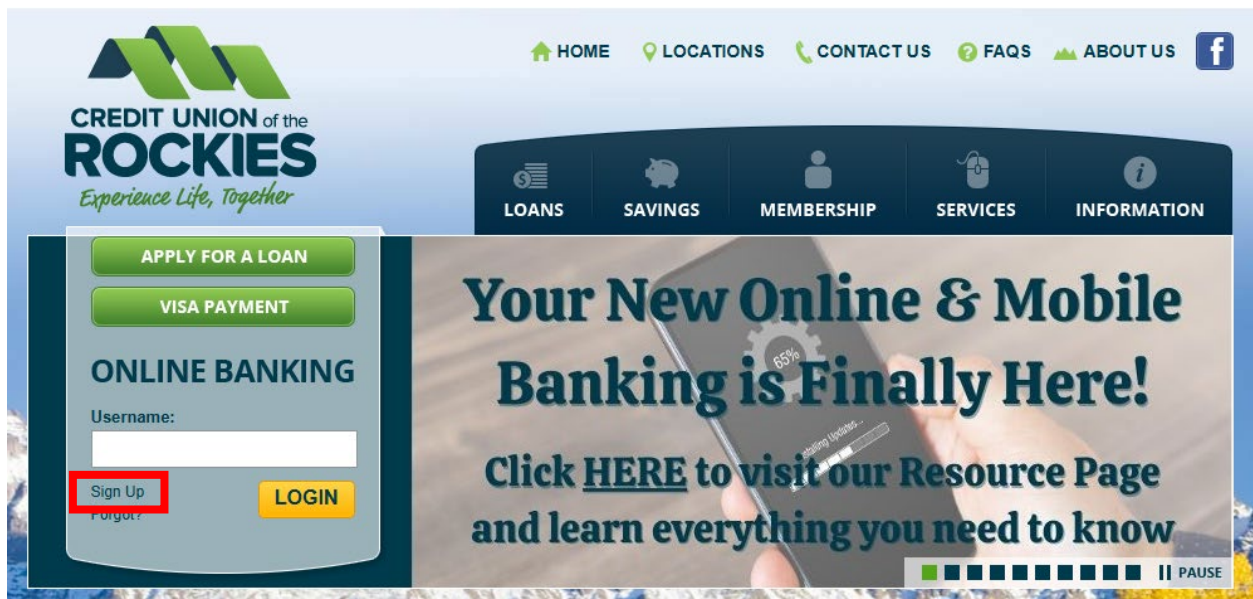
## Online Banking Enrollment Guide

New to Online Banking?

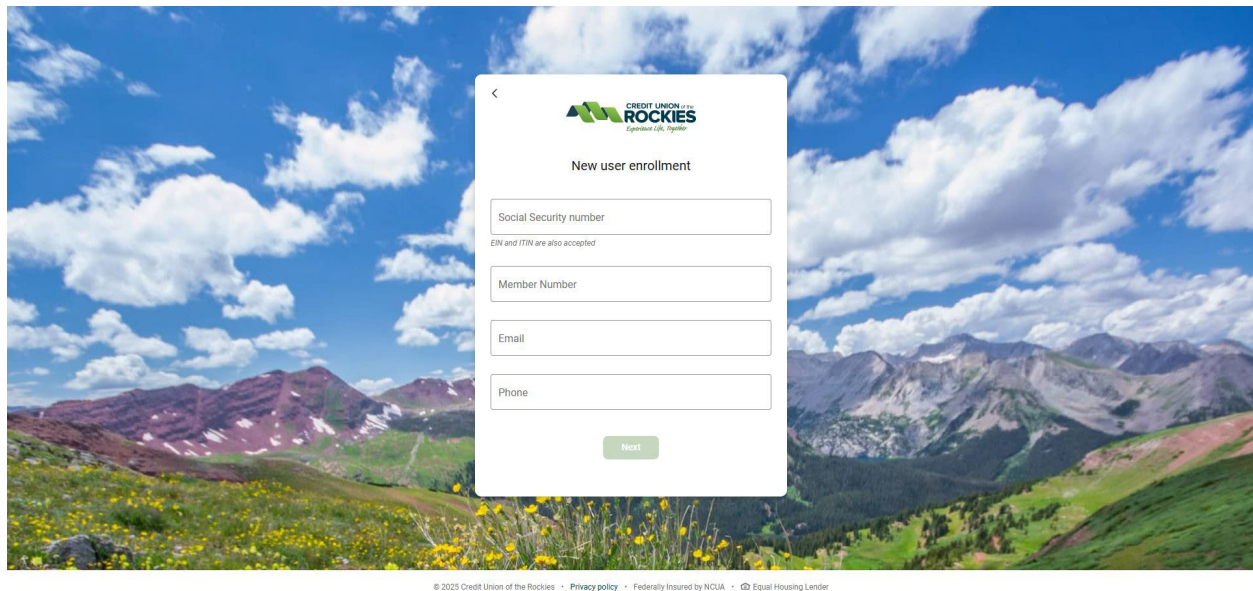
To begin, visit [www.cu-rockies.org](http://www.cu-rockies.org) and navigate to the Online Banking window.

Select “Sign Up.”

Or visit <https://my.cu-rockies.org/enroll>



Fill in the **primary** member's social security number, member number (account number), email address, and phone number.



The image shows a 'New user enrollment' form overlay on a scenic mountain landscape. The form is white with a green 'Next' button. It includes fields for Social Security number, Member Number, Email, and Phone. A note indicates that EIN and ITIN are also accepted for the Social Security number field.

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New user enrollment

Social Security number  
EIN and ITIN are also accepted

Member Number

Email

Phone

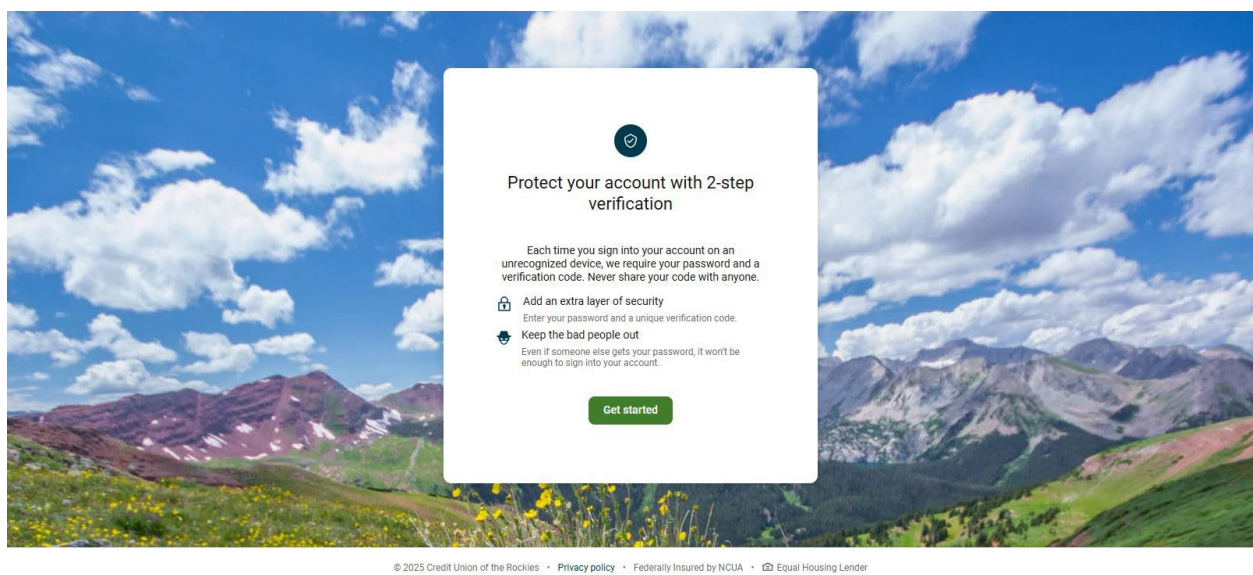
Next

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Our upgraded security setting will now require 2-step verification.

Each time you sign in to your accounts on an unrecognized device, we require your password and a verification code.


This update will add an extra layer of protection to your account, ensuring you have complete control over who can access your information.




The image shows a 'Protect your account with 2-step verification' screen overlay on the same mountain landscape. The screen is white with a green 'Get started' button. It explains the requirement for 2-step verification and lists two options: 'Add an extra layer of security' and 'Keep the bad people out'.

Protect your account with 2-step verification

Each time you sign into your account on an unrecognized device, we require your password and a verification code. Never share your code with anyone.

 Add an extra layer of security  
Enter your password and a unique verification code.

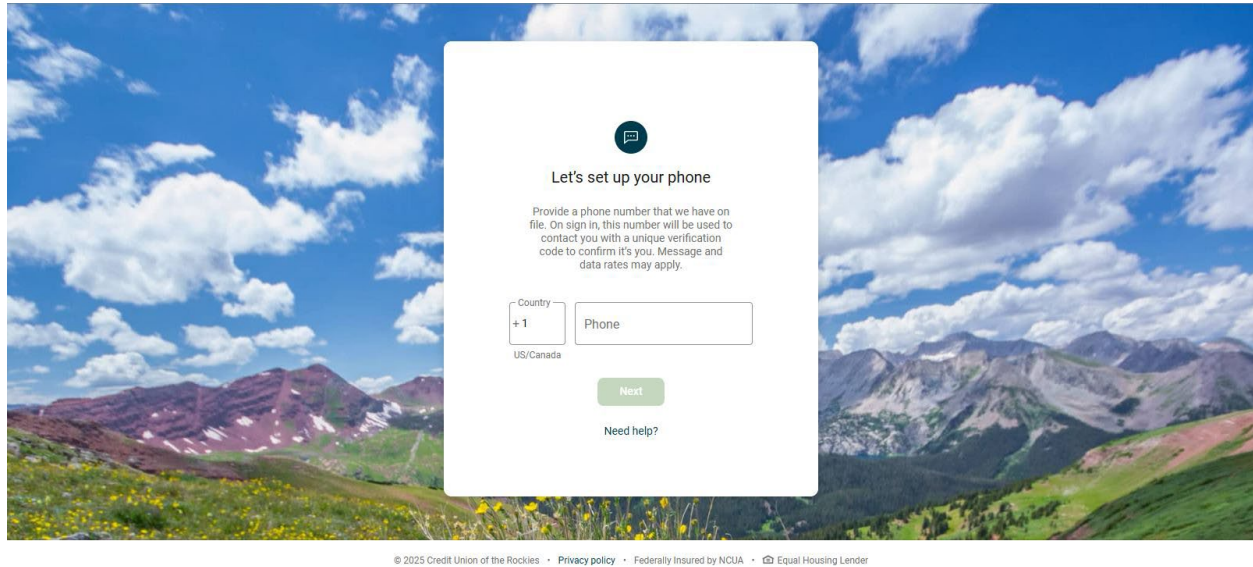
 Keep the bad people out  
Even if someone else gets your password, it won't be enough to sign into your account.

Get started

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Enter the phone number you wish to use for 2-step verification.

This phone number will need to receive a verification code each time you log in to an unrecognized device.



Let's set up your phone

Provide a phone number that we have on file. On sign in, this number will be used to contact you with a unique verification code to confirm it's you. Message and data rates may apply.

Country  Phone

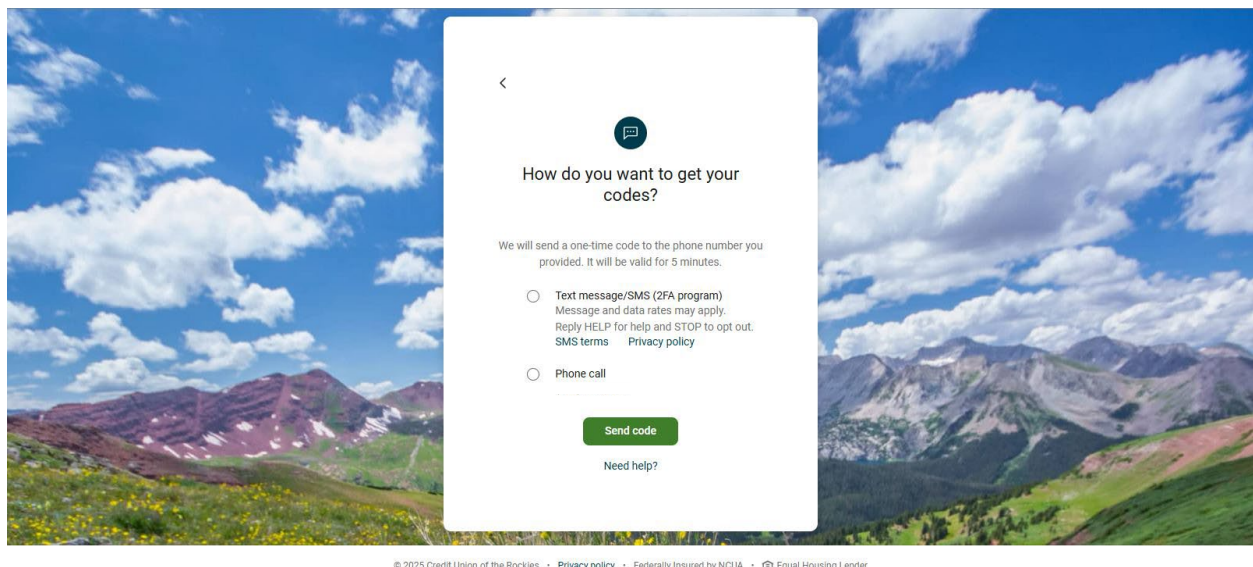
US/Canada

Next

Need help?

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Next you will choose how you wish to receive your verification code by phone number (Text Message/SMS or Phone Call).



<

How do you want to get your codes?

We will send a one-time code to the phone number you provided. It will be valid for 5 minutes.

☐ Text message/SMS (2FA program)  
Message and data rates may apply.  
Reply HELP for help and STOP to opt out.  
SMS terms Privacy policy

☐ Phone call

Send code

Need help?

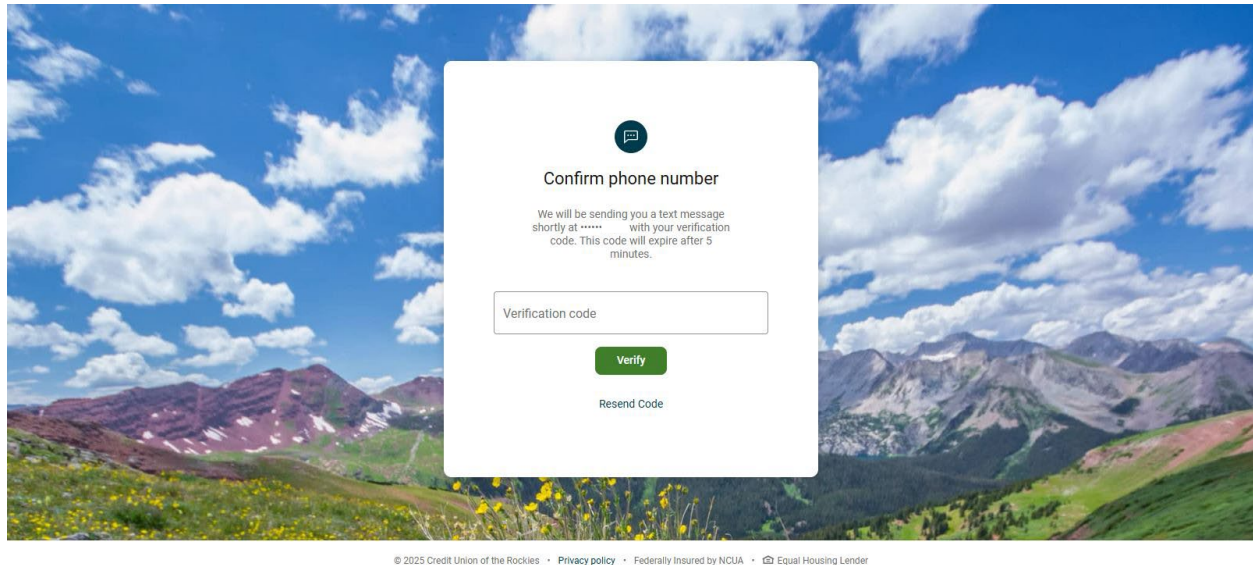
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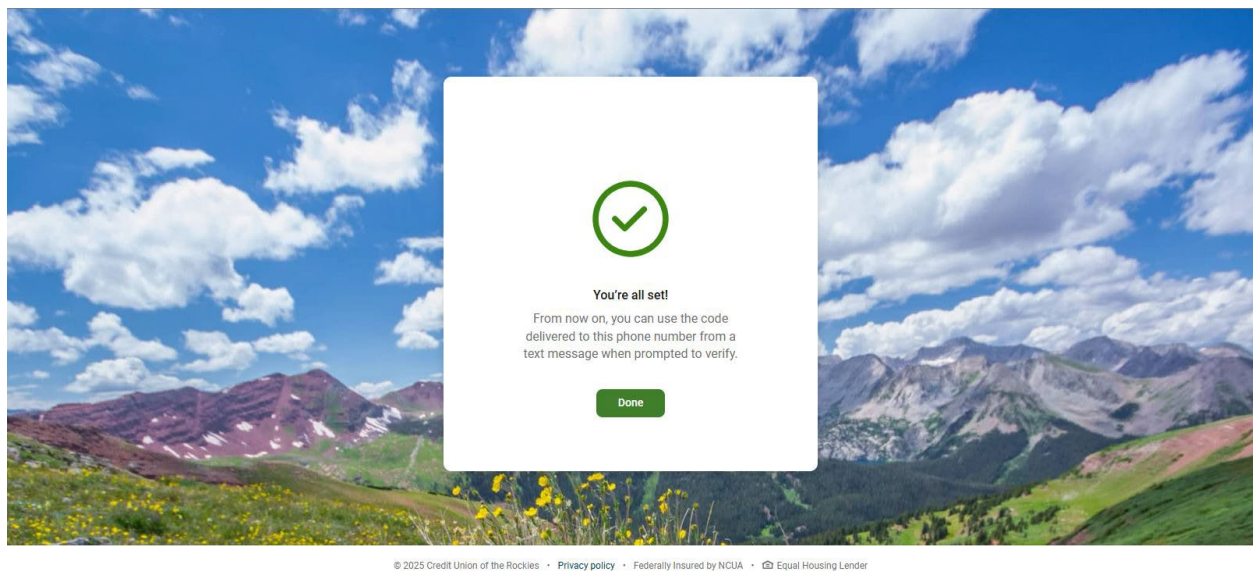
Enter the verification code received by call or text.

If your code has expired or you've missed your call, click the "Resend Code" option below the verify button.

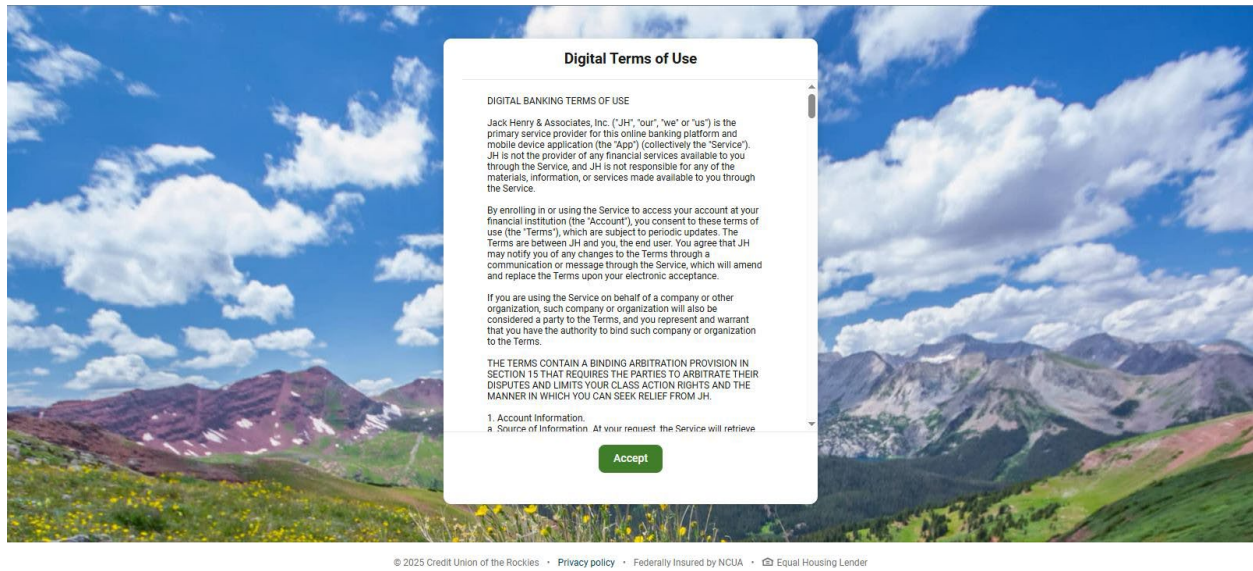
Codes will still be required for other browsers on the device, as well as when logging in to unrecognized devices.



You will receive a confirmation message when your verification is set up successfully.



Review and Accept the User Agreement if you wish to continue.

A screenshot of a mobile application interface showing the 'Digital Terms of Use' screen. The screen is overlaid on a scenic background of a mountain range with green hills and yellow wildflowers in the foreground, under a blue sky with white clouds. The 'Digital Terms of Use' modal is white with a green 'Accept' button at the bottom. The text inside the modal includes the title 'Digital Terms of Use', a section header 'DIGITAL BANKING TERMS OF USE', and several paragraphs of legal text. At the bottom of the modal, there is a small section titled '1. Account Information' with a sub-point 'a. Source of Information' stating 'At your request, the Service will retrieve'.

**Digital Terms of Use**

DIGITAL BANKING TERMS OF USE

Jack Henry & Associates, Inc. ("JH", "our", "we" or "us") is the primary service provider for this online banking platform and mobile device application (the "App") (collectively the "Service"). JH is not the provider of any financial services available to you through the Service, and JH is not responsible for any of the materials, information, or services made available to you through the Service.

By enrolling in or using the Service to access your account at your financial institution (the "Account"), you consent to these terms of use (the "Terms"), which are subject to periodic updates. The Terms are between JH and you, the end user. You agree that JH may notify you of any changes to the Terms through a communication or message through the Service, which will amend and replace the Terms upon your electronic acceptance.

If you are using the Service on behalf of a company or other organization, such company or organization will also be considered a party to the Terms, and you represent and warrant that you have the authority to bind such company or organization to the Terms.

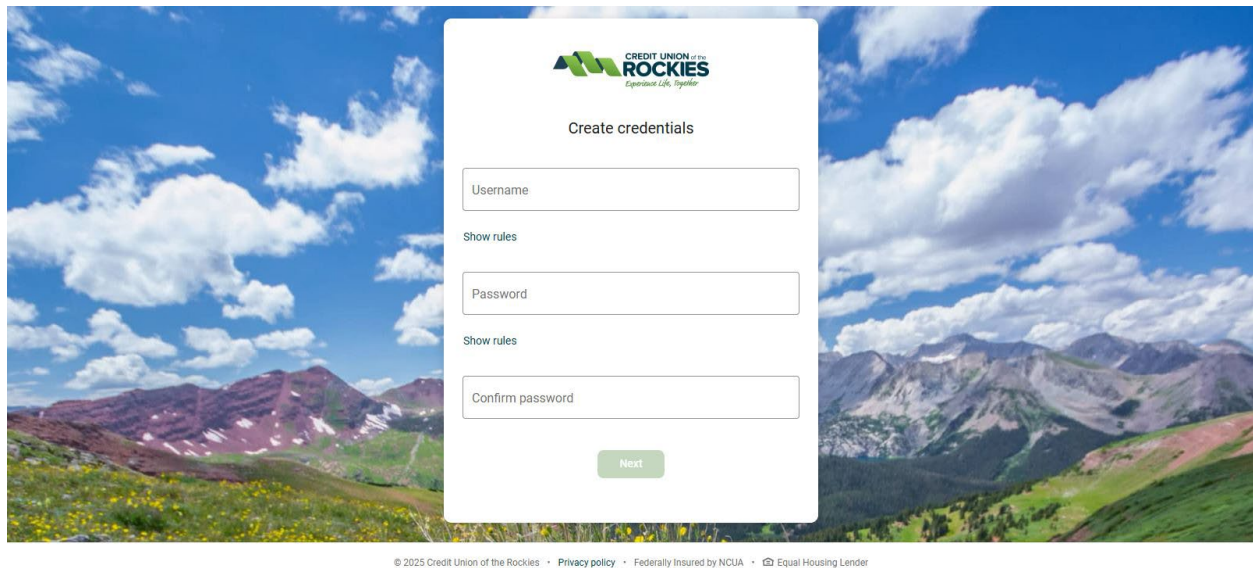
THE TERMS CONTAIN A BINDING ARBITRATION PROVISION IN SECTION 15 THAT REQUIRES THE PARTIES TO ARBITRATE THEIR DISPUTES AND LIMITS YOUR CLASS ACTION RIGHTS AND THE MANNER IN WHICH YOU CAN SEEK RELIEF FROM JH.

1. Account Information  
a. Source of Information At your request, the Service will retrieve

**Accept**

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Create your username and password for **both** Online and Mobile Banking.

A screenshot of a mobile application interface showing the 'Create credentials' screen. The screen is overlaid on the same scenic background as the previous screen. The 'Create credentials' modal is white with a green 'Next' button at the bottom. It features the Credit Union of the Rockies logo at the top, followed by the title 'Create credentials'. Below the title are three input fields: 'Username', 'Password', and 'Confirm password'. Each input field has a 'Show rules' link below it. The 'Next' button is green and located at the bottom of the modal.

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**Create credentials**

Username

Show rules

Password


Show rules

Confirm password

**Next**

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You're all set! Welcome to your home screen!



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**ROCKIES**  
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Dashboard

Messages4

Accounts

Transfers

Deposit check

Bill pay

Support

Hi, Michael

Accounts

Checking  
x1234\$1,175.01  
Available

Savings  
x4321\$2,423.25  
Available

Loan  
x2345\$6,712.37  
Balance

Transfer

Deposit

Pay a bill

Pay a person

Message

Transactions

YOUR TOWN CINEMA  
Nov 25, Checking\$7.50

GEORGE'S BBQ & PUB  
Nov 25, Checking\$37.25

ATM DEPOSIT  
Nov 25, Checking+\$128.52

YOUR TOWN UTILITIES  
Nov 25, Checking\$76.46

EL GRAN RESTAURANTE  
Nov 25, Checking\$13.98

HOMETOWN PASTERIES  
Nov 25, Checking\$1.57

See more


Payments

Pay a bill

Pay a person

Your Town Utilities x1234  
Scheduled\$291.00

Student Loans x1234  
Paid\$324.91



CREDIT UNION of the  
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Call

Message

Info

Remote deposits

0 Processing

9 Accepted

Messages

Holiday Hours  
Our branches will be closed on Thursday. We extend...8hr ago

Low funds Checking  
Available balance is low on CheckingNov 25

Jennifer and Amy  
No problem! We'll send a new card out first thin...Nov 25

Deposit to Savings  
A deposit over \$200.00 was made to your Saving...Nov 22

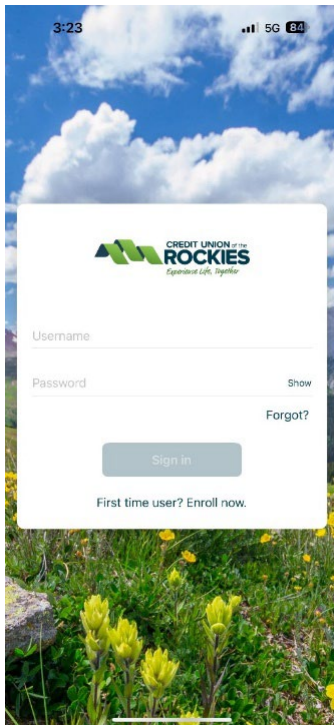
See more

Transfers

Michael



# Mobile Banking Enrollment Guide

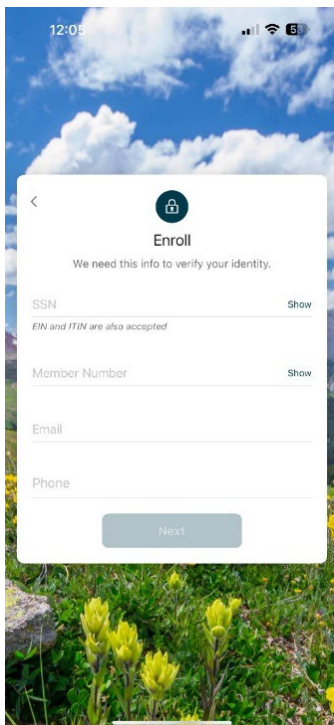


## New to Mobile Banking?

To begin, download the upgraded Credit Union of the Rockies mobile app from your app store.

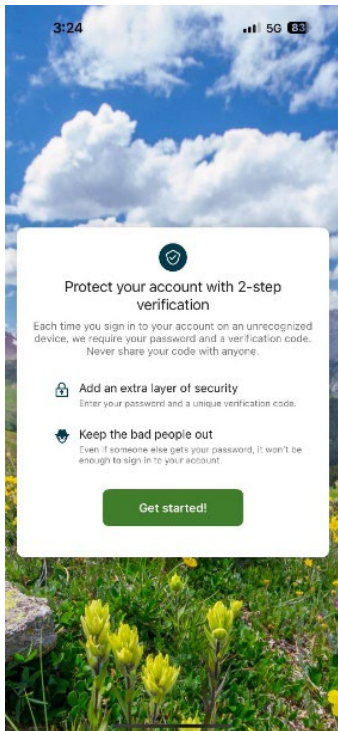
- [App Store](#) (Apple)
- [Google Play](#) (Android)

Open the app and select “First time user? Enroll now.”



Fill in the **primary** member’s social security number, member number (account number), email address, and phone number.

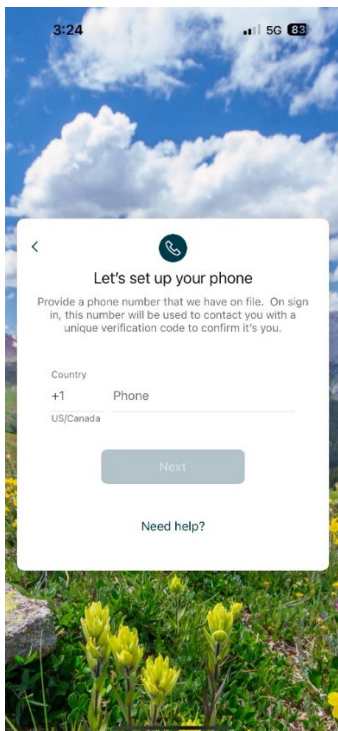




Our upgraded security setting will now require 2-step verification.

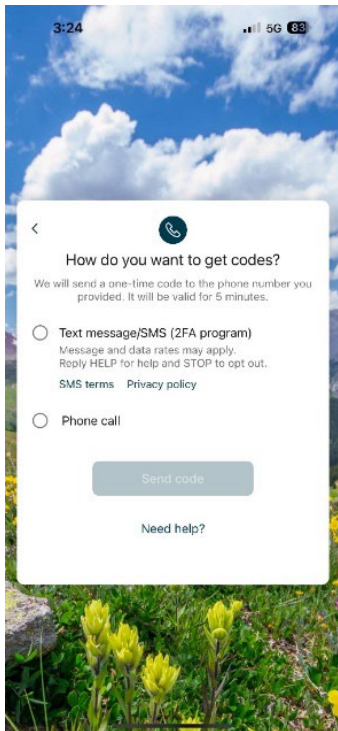
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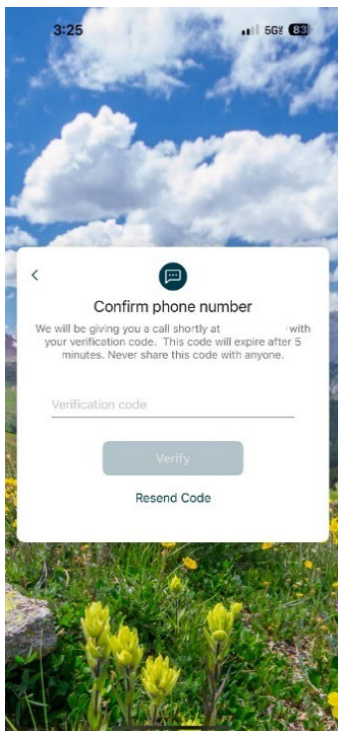


Enter the phone number you wish to use for 2-step verification.

This phone number will need to receive a verification code each time you log in to an unrecognized device.

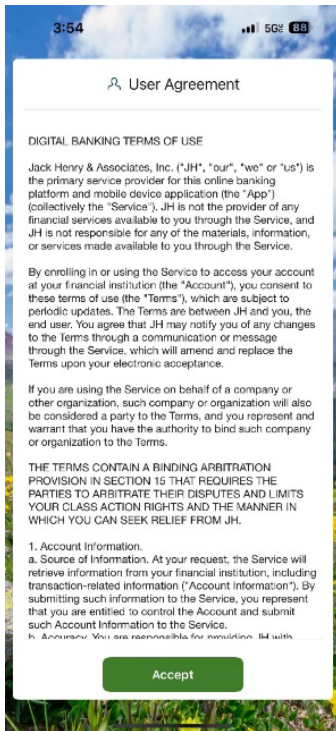


Next you will choose how you wish to receive your verification code by phone number (Text Message/SMS or Phone Call).



Enter the verification code received by call or text.

If your code has expired or you've missed your call, click the "Resend Code" option below the verify button.



3:54 56% 88

User Agreement

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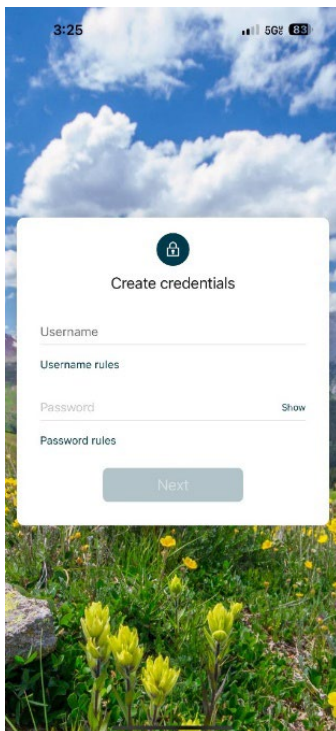
1. Account Information.

a. Source of Information. At your request, the Service will retrieve information from your financial institution, including transaction-related information ("Account Information"). By submitting such information to the Service, you represent that you are entitled to control the Account and submit such Account Information to the Service.

b. Accuracy. You are responsible for providing it with

Accept

Review and Accept the User Agreement if you wish to continue.



3:25 56% 88

Create credentials

Username

Username rules

Password Show

Password rules

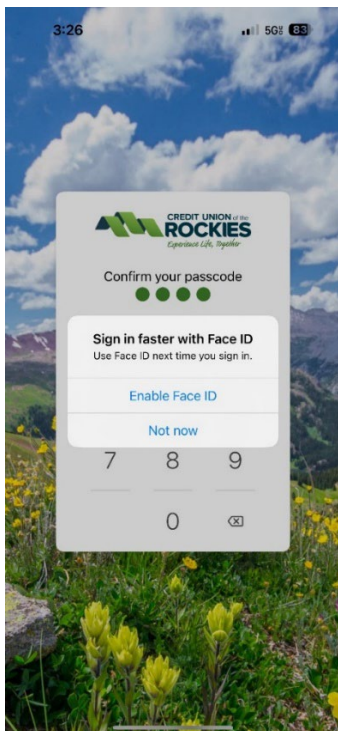
Next

Create your username and password for **both** Online and Mobile Banking.



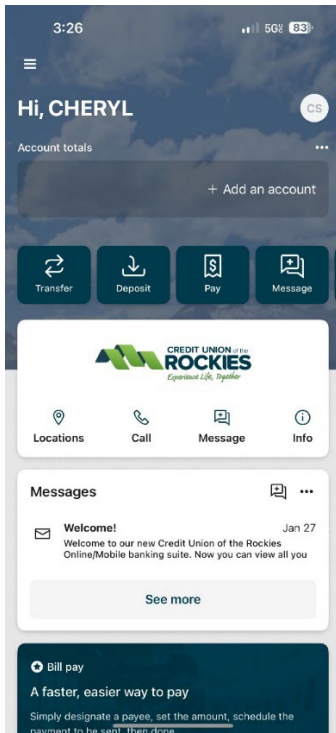
Create a passcode for your account on this device.

Select your desired passcode and reenter to confirm the code.



Finally, choose whether you would like to enable Face ID.





You're all set! Welcome to your home screen!