Editing / Managing Secondary (Sub) Users

Primary users can make changes to the records for a secondary user, including disabling or restoring all access for a user.

1. From any page in online banking, click **settings**.
2. Expand the **Users** section.
3. To change user information, click **Edit**, make your edits, click **Save** and then follow the prompts to save your changes.

   Note: Settings can be disabled if a change would disrupt a user workflow currently in process, such as a pending approval.

4. To delete a user, click **Delete** and then follow the prompts to save your changes.

   Note: Use caution in deleting a secondary user, as any processes created by that user, such as a scheduled or recurring transfer, will also be deleted.

5. To disable a user, click **Edit** and then select the **Disabled** option. Click **Save** and follow the prompts to save this change.

6. If a newly created secondary user does not successfully create a password and the enrollment process must be restarted, do the following:
   a. First make sure that the email for the secondary user is correct. Click **Edit** and verify or change the secondary user's email.
   b. Click **Resend Enrollment**.
      A Resend Enrollment lightbox opens.
   c. Verify that the email address and other information is correct for the secondary user.
   d. Click **Resend Enrollment**.

The secondary user enrollment process sends an email with an enrollment link that expires in a configurable amount of time. For security purposes, the expiration time should be relatively short. Before the link expires, the secondary user must use the link to create a password, after which the link no longer functions. After creating a password, the user can begin the enrollment process. The primary user must make sure the secondary user knows his or her user ID. Secondary users must enter their user ID in order to complete the enrollment process.

Note: If the email is received on the primary user's computer, the primary user's online banking session must end before the secondary user enrollment process begins.

7. To reset the secondary user password, inform the secondary user that he or she must use the forgotten password feature on the PS Bank Online Banking login page. To protect the security of passwords, this is the only method for secondary user password reset. Online Banking does not allow a primary user to create a secondary user's password.

8. Either:

   o Enter a summary of your action(s) in the **Description of changes** text box, and then click **Save to Staging**.

   - or -

   o Move to another section or tab and make additional changes.

   For best results, save your changes before working on additional configuration tasks.

The PS Bank Customer Care is available to assist with any questions about the online banking system, and how to successfully transition your current processes to the new platform.

You may reach out any time during business hours by calling:

1-866-746-1011

You may also e-mail at:

ebanking@psbanking.com