



How to Remove Account View Access from User Quick Guide

Introduction

This quick guide explains how to remove account view access from a user. Once removed, the user will not be able to view account transactions and history.

Remove Access

1. At the top of the homepage, click on **Administration**.
2. Under the Administration section, click on **Employee Profile & Permissions**.
3. Under **Select User Criteria**, select **Change Employee**, and select **Codes** under the **Go To** drop-down:
4. Click **Submit**.

The screenshot shows the top navigation bar with 'Administration' selected. Below it, the 'Administration' section contains four buttons: 'ACH Template', 'Wire Template', 'Employee Profile & Permissions' (highlighted), and 'Employee Accounts'. The 'Employee Profile & Permissions' section has a 'Select User Criteria' header. Under this header, there are radio buttons for 'Inquire Employee', 'Change Employee' (selected), 'New Employee', 'New Employee Using Existing Employee', and 'Delete Employee'. A 'Go To...' dropdown menu is set to 'Codes'. There are input fields for 'Name:' and 'Username:'. At the bottom of the form are 'Submit' and 'Clear' buttons.

5. Under the **Employee List**, select the employee you wish to remove account view access.
6. Under the **Accounts** section, locate the account in which you want to remove view access. Click on the **green hyperlink**.

The screenshot shows the 'Accounts' section with a table of account access. The table has columns for 'Access', 'Account Number', 'Account Nickname', and 'ACH Permission'. The 'Access' column has checkboxes, and the 'ACH Permission' column has dropdown menus. The 'Account Number' column contains green hyperlinks. The first row has a checked checkbox, account number 'XXXXX2661', and 'Full ACH Access'. The second row has a checked checkbox, account number 'XXXXX8570', and 'No ACH Access'. The third row has a checked checkbox, account number 'XXXXX4324', and 'Full ACH Access'. A 'Select None' link is visible above the table.

Access	Account Number	Account Nickname	ACH Permission
<input checked="" type="checkbox"/>	XXXXX2661		Full ACH Access
<input checked="" type="checkbox"/>	XXXXX8570		No ACH Access
<input checked="" type="checkbox"/>	XXXXX4324		Full ACH Access

7. Once the **Inquire Employee Account** screen appears, click on the **Change** icon.

The screenshot shows the 'Employee Profile & Permissions' section with a sub-section titled 'Inquire Employee Account'. At the bottom right of this section, there is a 'Change' icon (a square with a diagonal line) highlighted by a red box.

8. Under the **Account Options** section, change all options to **No**.



The screenshot shows a panel titled "Account Options" with a close button in the top right corner. It contains five rows, each with a label and a dropdown menu. The labels are "Inquiry Detail:", "Presentments:", "Transactions:", "Exports:", and "Account Number Display:". All five dropdown menus are currently set to "No" and are highlighted with an orange border.

9. Under the **Fund Transfer Options** section, change all options to **No**.



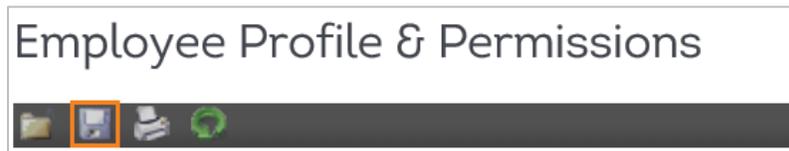
The screenshot shows a panel titled "Fund Transfer Options" with a close button in the top right corner. It contains six rows. The first row is "Overdrafts Allowed:" with a dropdown menu set to "No". The second row is "Loan Payment:" with a dropdown menu set to "All". The third row is "Tax Payment:" with a dropdown menu set to "No". The fourth row is "Bill Payment:" with a dropdown menu set to "No". The fifth row is "Internal Transfer In:" with a dropdown menu set to "No". The sixth row is "Internal Transfer Out:" with a dropdown menu set to "No". All dropdown menus are highlighted with an orange border.

10. Under the **Stop Payments** section, change all options to **No**.



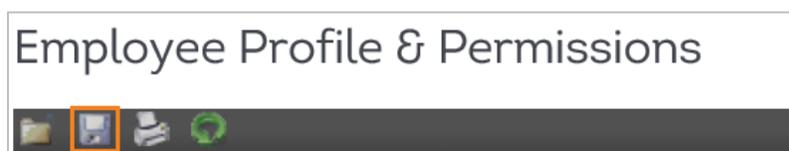
The screenshot shows a panel titled "Stop Payments" with a close button in the top right corner. It contains two rows. The first row is "Inquiry:" with a dropdown menu set to "No". The second row is "Add:" with a dropdown menu set to "No". Both dropdown menus are highlighted with an orange border.

11. Scroll to the top of the page and click the **Save** icon.



View capability is now removed, from the user, on that specific account. Repeat the steps above for each desired account.

12. Once the user screen appears, scroll to the top of the page, and click the **Save** icon. No further action is required.



Contact

Contact your Treasury Representative for any questions or assistance. You may also contact the Treasury Support Department at 855-342-3400 or treasury.solutions@fib.com.

09/08/2021



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