



CUA'S NEW

ONLINE & MOBILE
BANKING

The better way forward

COMING
AUGUST 16, 2024

In May, we advised you that CUA is moving to a new online and mobile banking system during the weekend of August 16 - 18, 2024. There are things you need to do **before** August 16 for a seamless transition. Please review our Member Action List below.

All Members

1. Check that your email address and mobile number are correct by using our [step-by-step guide](#). You will not be able to access the new online and mobile banking system without this information.
2. Record any *Interac* e-Transfer contact information you'd like to use in the new system. These contacts will not be automatically transferred. Please follow our [step-by-step guide](#).
3. Download and save or print any bank statements or transaction details (e.g., cheque images) that you wish to keep for easy access. You can follow our [step-by-step guide](#). You will not be able to see these items within the new online and mobile banking system. If needed, CUA can provide you with this information.
4. Download and save or print any of your previous tax receipt slips (such as your T4RSP, T5 or RRSP receipts) that you wish to keep for easy access. You can follow our [step-by-step guide](#). You will not be able to see these items within the new online and mobile banking system. If needed, CUA can provide you with this information.
5. Record any banking alerts that you currently have set up and would like to continue receiving. You will need to set these up again in the new system.
6. For any Request Money via *Interac* e-Transfer transactions that you have initiated, cancel any that are still not fulfilled prior to 6:00 p.m. on Friday, August 16. This transaction will not transfer and will need to be redone in the new system.
7. Confirm that you don't need to change or cancel any pending *Interac* e-Transfers that you have sent prior to 6:00 p.m. on Friday, August 16. You will not be able to see or change these once you access the new system.
8. Complete any banking activities or transactions by 6:00 p.m. on Friday, August 16 that are needed to be performed before 8:30 a.m. on Monday, August 19, or 8:30 a.m. on Tuesday, August 20 if the transaction is an *Interac* e-Transfer.

Small Business Members

1. Make note of any appointed delegates. You will need to re-appoint these in the new online and mobile banking system.
2. Ensure any transactions that require approval from a second signor have been completed by 6:00 p.m. on August 16. Initiated but not approved transactions will need to be redone in the new system.
3. Record any CRA account profiles and payment history that you wish to keep. These will not be transferred to the new system, but you can always access them through your MyCRA account.

REMINDER: Online banking and the mobile app will be unavailable from Friday, August 16, at 6:00 p.m. until Monday, August 19, at 8:30 a.m. *Interac* e-Transfer service will resume on Tuesday, August 20, at 8:30 a.m.