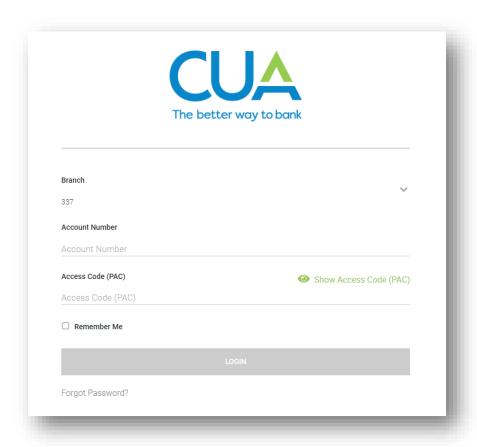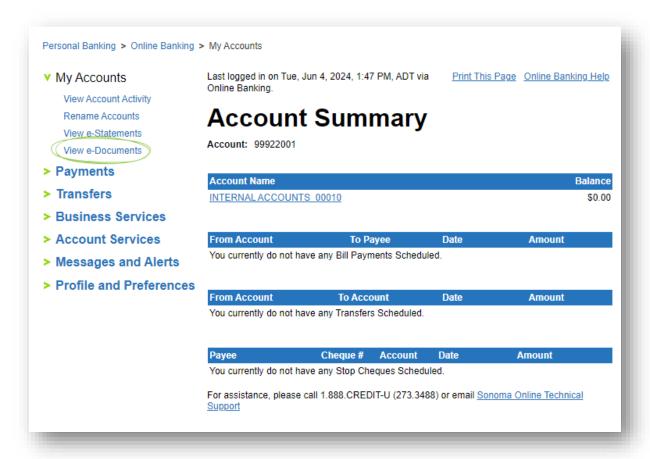**MEMBER WALKTHROUGH GUIDE**

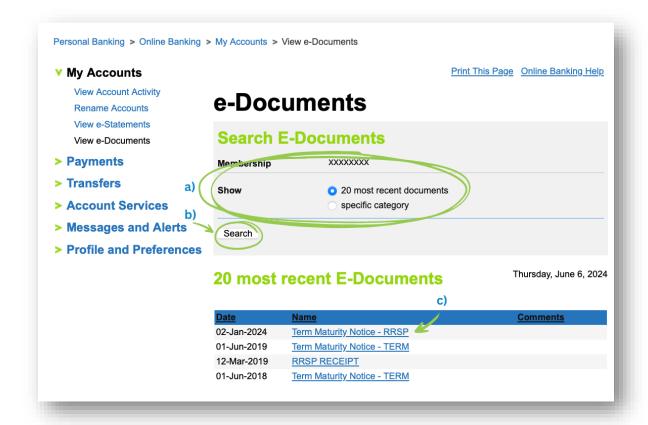## GUIDE 6: SAVE PAST TAX RECEIPT SLIPS

1. Login to your Online Banking at https://cua.com/Home/OnlineBanking/.

2. Once you've logged in, you will be brought to the 'Account Summary' page. To view and download your tax information, select 'View e-Documents' beneath 'My Accounts' at the top of the lefthand menu.

Personal Banking > Online Banking > My Accounts

∨ My Accounts
 View Account Activity
 Rename Accounts
 View e-Statements
 View e-Documents

> Payments

> Transfers

> Business Services

> Account Services

> Messages and Alerts

> Profile and Preferences

Last logged in on Tue, Jun 4, 2024, 1:47 PM, ADT via Online Banking.

Print This Page   Online Banking Help

Account Summary

Account: 99922001

Account Name	Balance
INTERNAL ACCOUNTS 00010	$0.00

From Account	To Payee	Date	Amount
You currently do not have any Bill Payments Scheduled.

From Account	To Account	Date	Amount
You currently do not have any Transfers Scheduled.

Payee	Cheque #	Account	Date	Amount
You currently do not have any Stop Cheques Scheduled.

For assistance, please call 1.888.CREDIT-U (273.3488) or email Sonoma Online Technical Support

3. On the 'e-Documents' page, within the 'Search e-Documents' tool you can choose to a) view your 20 most recent e-Documents or select a specific category. To view the results b) select the 'Search' button. Your e-Documents will now appear in a reverse chronological (most recent first) list. Now you can c) select the hyperlinked title of the document you'd like to download from the list.

4. Once you've been redirected to the next page, select 'Download' and a PDF file will begin downloading.

Note: This PDF file will be saved to your 'Downloads' folder, found on the lefthand menu of File Explorer (Windows) or Finder (macOS). You can also access your downloads from your browser by simultaneously pressing 'Ctrl' + 'J' (Windows) or 'Command' + 'Shift' + 'L' (macOS). From there you can choose to relocate your file to a secure location or print a physical record.