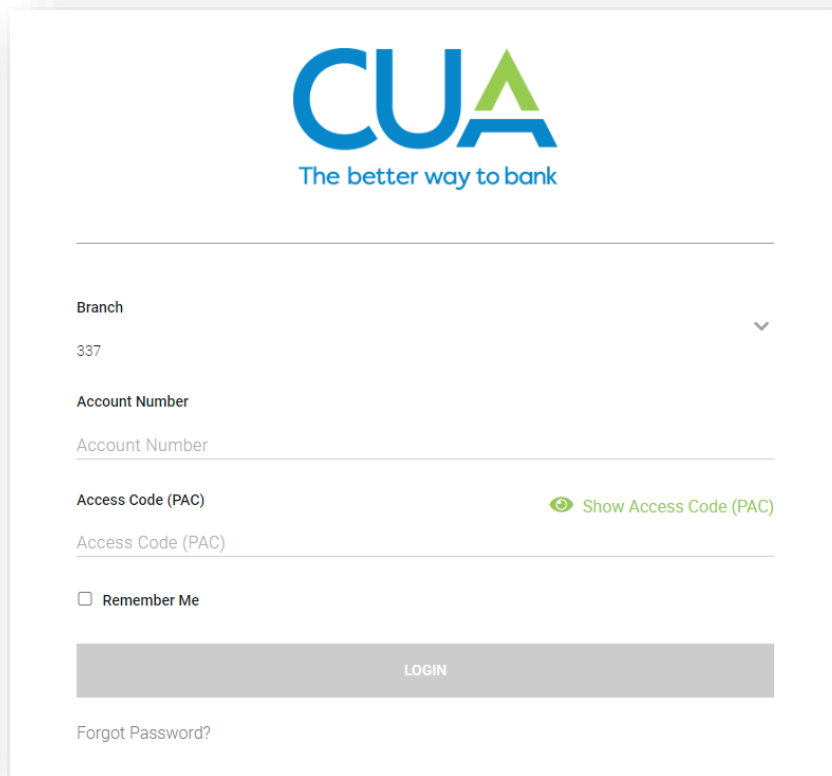


MEMBER WALKTHROUGH GUIDE

GUIDE 6: SAVE PAST TAX RECEIPT SLIPS

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



The screenshot shows the CUA Online Banking login interface. At the top, the CUA logo is displayed with the tagline "The better way to bank". Below the logo, there is a horizontal line. The form contains the following elements:

- Branch:** A dropdown menu with the value "337" and a downward arrow.
- Account Number:** A text input field with the placeholder text "Account Number".
- Access Code (PAC):** A text input field with the placeholder text "Access Code (PAC)". To the right of the field is a green eye icon and the text "Show Access Code (PAC)".
- Remember Me:** A checkbox followed by the text "Remember Me".
- LOGIN:** A grey rectangular button with the text "LOGIN" in white.
- Forgot Password?:** A link located below the LOGIN button.

- 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

Last logged in on Tue, Jun 4, 2024, 1:47 PM, ADT via [Print This Page](#) [Online Banking Help](#)
Online Banking.

Account Summary
Account: 99922001

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

Account Name	Balance
INTERNALACCOUNTS_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.

Personal Banking > Online Banking > My Accounts > View e-Documents

[Print This Page](#) [Online Banking Help](#)

My Accounts

- [View Account Activity](#)
- [Rename Accounts](#)
- [View e-Statements](#)
- [View e-Documents](#)

Payments

Transfers

Account Services

Messages and Alerts

Profile and Preferences

e-Documents

Search E-Documents

Membership: xxxxxxxx

Show

20 most recent documents

specific category

Search

20 most recent E-Documents

Thursday, June 6, 2024

Date	Name	Comments
02-Jan-2024	Term Maturity Notice - RRSP	
01-Jun-2019	Term Maturity Notice - TERM	
12-Mar-2019	RRSP RECEIPT	
01-Jun-2018	Term Maturity Notice - TERM	

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.

