

Telephone Teller FAQs



TRUE NORTH
FEDERAL CREDIT UNION

Why did you change the Telephone Teller system?

Unfortunately, this was a system that we had to change. The old one was proprietary to the old core system, and additionally they were no longer supporting it.

What Features are offered?

Our new Telephone Teller system has all the features you are used to using. You can check balances, transfer funds, pay loans, request check stop payments and more. However, there are some great enhancements with the new platform:

- If you can't find the answers you are looking for, during regular hours you can transfer directly to our Member Contact Center!
- You can enroll in the service on the phone - no need to stop by the branch or sign paperwork!
- If you have multiple accounts, you can access them all through one login!

How do I first access Telephone Teller?

The first time you access the new system, Press 1 to access your account information. You will be prompted to enter information to establish login credentials, verify information, and create up your PIN. You will be prompted to enter your:

- Member Number
- Last 4 digits of your Social Security Number
- Your Date of Birth (MMDDYYYY)
- Your Full Social Security Number (SSN)
- A new six digit PIN

The next time you login, you'll again press 1, but after you enter your account number and last 4 digits of your SSN, you will be prompted for your PIN.

Why do I enter my full Social Security Number after the last 4?

When registering for the service, the system will prompt you for the last 4 digits of your SSN, and then later your full SSN. The first prompt, for the last 4 of your SSN, is part of your regular login information. After you enter

that, when the system doesn't recognize you as an established user, it then begins the registration steps which include Date of Birth and your full SSN.

What will I need to login after the first login?

Once your registration is set up, you'll only need your member number, last 4 digits of your SSN, and your PIN. The last four digits of your SSN are part of the registration process to differentiate your access from that of a joint member that shares your member number but might have access to different accounts.

I have more than one Member Number with True North. Which do I use?

If you have multiple Member Numbers and aren't sure which to pick, we recommend that you pick the one that you are most likely to remember, as it will become part of your logon ID to use the service. With one login, you'll be able to obtain information on any account on which you are an owner or borrower.

Once you are logged in, if you have multiple accounts you'll be prompted to pick an account after you enter the Account Access Menu (see below).

What does the system mean by Account Number and ID Number?

When the system asks for your Account Number, it's referring to your member number, which is 4 to 6 digits long. The ID Number is the identifier for your individual products, and will be 4 digits long. Your Primary Share, an S1 in the old system, will be 0001. An Express Checking, formerly S78, will be 0078. You'll know your ID Numbers from looking at your statements or home banking, or asking a True North branch or contact center staff member.

Can I still transfer money to other True North members?

Yes, like with the prior version of Telephone Teller, you can transfer funds to other holders of True North accounts. You will need their member number and the ID of the account to which you would like to deposit the account, as well as their last name.

Do I have to press “#” after each entry?

No. The system will operate whether you press pound or not, but you do have that option.

What are the Menu Options?

Once logged in to Telephone Teller, the main menu options are laid out below. For deposit accounts, you will be able to hear recent activity, research check numbers, transfer funds, request a stop payment, request a check up to \$10,000, hear Year to Date information and connect with the Member Contact Center. For Loan accounts you will be able to hear recent payments, make a payment, hear payoff information and Year to Date information, and connect with lending departments.

- A. Account Access
 - 1. Checking Account
 - 2. Share Savings or Money Market Account
 - 3. Loans
 - 4. Transfer funds
 - 5. Credit Cards
 - 7. Certificates
 - 8. Change PIN
 - 0. Transfer to Member Contact Center
- B. Lost/Stolen Card support
- C. Merchant Check Verification

Here's some tips about moving around the system:

- If you have more than one member number, you'll be prompted to input or select the appropriate account, or you can listen to a list and select the appropriate account.
- Once your member number is selected, if you have more than

one of the product type selected, you will be given a list of those to select from as well.

- While the system may not prompt it, you can press “#” after entering data to move more quickly through the prompts.
- From most locations, you can press “*” to return to the Member Main Menu.

How will I know the right account given the new account number structure?

The previous Telephone Teller system required you to enter your account and loan suffix (S1 or L14, for example). The new system will prompt you to choose the account category (Checking, Savings, Certificates or Loans). If you have more than one member number under that category, you will be asked to enter the last 4 numbers of your Account number. Then, if you have more than one product of that type (such as 2 loans) you will be asked to pick the correct loan from a list. Remember that account identifiers will be changing, although you'll still recognize them. For instance, an S1 savings account will now be listed as 0001.

Why does the system sometimes automatically try to transfer me to the Contact Center?

If you try to do a transaction that the system cannot complete, the system will automatically transfer you to the contact center so that they can help you resolve your issue. For example, this would happen if you were trying to transfer to or from a dormant account.