Key Organizational Contacts in Premier View
Frequently Asked Questions

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Questions About Contact and Premier View Administrators

What is the difference between a Contact Administrator and a Premier View Administrator?
A Contact Administrator (a new role) is someone that has the limited authority to add, modify or delete contacts and their responsibilities on your Key Organizational Contact List (Manage Key Organizational Contact Authority). All Premier View Administrators with Add or Edit functions have been granted the authority to manage Key Organizational Contacts as a Contact Administrator.

Why is the Lead Contact Administrator responsibility grayed out?
The user must have the Manage Key Organizational Contacts authority in Premier View to be assigned the Lead Contact Administrator responsibility. Any user with this responsibility can add/edit or remove contacts from this list. Generally Premier View Administrators and Contact Administrators will have this authority.

Can there be more than one Lead Contact Administrator?
Yes, more than one user can be assigned the Lead Contact Administrator Responsibility. However, this user must have the Manage Key Organizational Contacts authority in Premier View. In addition, all Lead Contact Administrators will receive the pop-up notification to review/confirm Key Organizational Contacts until the process is completed.

Is the Lead Contact Administrator responsibility able to be reassigned?
Yes, a Premier View Administrator and/or a Contact Administrator can reassign the Lead Contact Administrator responsibility to another Premier View user with the Manage Key Organizational Contacts authority.

What if the only user with the Contact Administrator responsibility is deleted from Premier View, or if we want to add additional Contact Administrators?
Alloya will be monitoring credit unions that do not have this responsibility assigned. Your Premier View Administrators can assign another user the Manage Key Organizational Contacts Authority. If you have no Premier View Administrators, your credit union can submit a Premier View Authority form requesting that a user be assigned the Manage Key Organizational Contacts authority.

Questions About Adding/Updating Key Contacts

Is there a fee associated with adding a user to the Organization's Key Contact List?
No, there is no fee associated to adding a contact that is not a Premier View User to the Organization's Key Contact List. These individuals will be set up in Premier View as contact only, will not be authorized to access Premier View and the credit union will not be charged to have them included in the Key Organization Contacts list.

How often will my credit union be prompted to update contact information?
The Lead Contact Administrator(s) will receive the pop-up notification to review and confirm key organizational contacts every 180 days.

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Who will receive the pop-up notifications?
Only Contact Administrators assigned to the Lead Contact Administrator Responsibility will receive the pop-up notification to review and confirm key organizational contacts in Premier View.

How often should I review key organizational contacts?
It's recommended that you review and update the list of key organizational contacts any time there are changes to key personnel at your credit union or changes to email addresses.

Can I update contact information at any time?
Yes, Premier View Administrators and/or Contact Administrators can access the Key Organizational Contacts page and update contact preferences at any time.

Can I add a group email as a key contact?
No, it's recommended that only individual emails are added as key contacts. Group emails should only be utilized for Premier View notifications regarding transactions, such as wires and loans.

Questions About the Key Organizational Contacts Page

Where do I go to access the Key Organization Contacts page?
The Key Organizational Contacts page is located on the left-side toolbar of Premier View under Administration > Organization Administration > Key Organization Contacts.

What Premier View users can access the Key Organizational Contacts page?
Only Premier View Administrators and/or Contact Administrators at your credit union can access the Key Organizational Contacts page.

Is there reporting available for key organizational contacts?
There is the ability to print the list of your key organizational contacts. For additional reporting, please contact Member Services at (800) 342-4328 or email memberservices@alloyacorp.org.

Questions About Key Contacts

Does every responsibility need an assigned key contact?
Yes, each responsibility needs to have at least one contact assigned. If a responsibility does not have an assigned contact, a message will be displayed indicating which responsibility is missing an assigned contact. ***Please Note: You cannot Confirm Key Organizational Contacts until all responsibilities have at least one contact assigned.***

Can I associate more than one responsibility to a key contact?
Yes, a key contact can have multiple responsibilities assigned to them.

Can I associate more than one key contact to a responsibility?
Yes, most responsibilities can have more than one key contact assigned to it. Only one key contact can be assigned the Lead Manager and Designated Voting Representative responsibility.

Will contact-only users added as key organizational contacts receive transactional messages?
No, users added as contact-only will not receive Premier View notifications regrading transactions. Additionally, contact-only users will not be authorized to access Premier View.

Questions About Premier View Users

What if an existing user is added again as Contact Only?
When the system recognizes that a duplicate user has been added, a message will be displayed notifying you that a user already exists and has Premier View authorizations and cannot be added as Contact Only. An individual should only be added as Contact Only if they do not have any Premier View authorities.

Does deleting a key contact from the Key Organizational Contacts page delete the user from Premier View?
No, deleting a key contact from the Key Organizational Contacts page will only remove the contact from the Key Organizational Contacts listing.

What happens if a user that is assigned a responsibility is deleted from Premier View?
The administrator initiating the change will be prompted with a message notifying you that the user about to be deleted has an assigned responsibility in Key Organizational Contacts and to assign a new or existing contact to that responsibility.