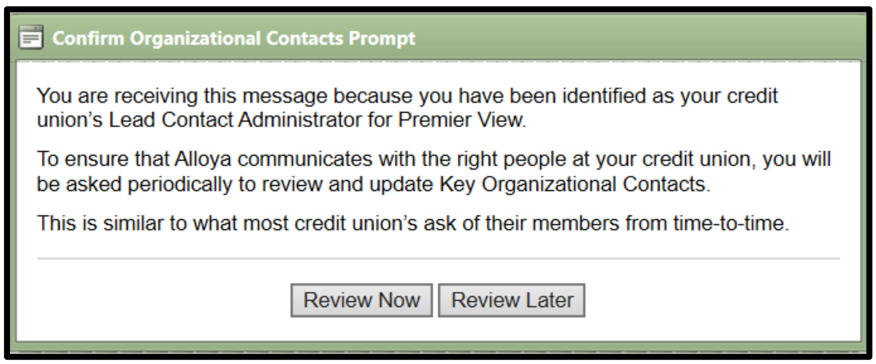
Procedures for Member Credit Unions
Key Organizational Contacts

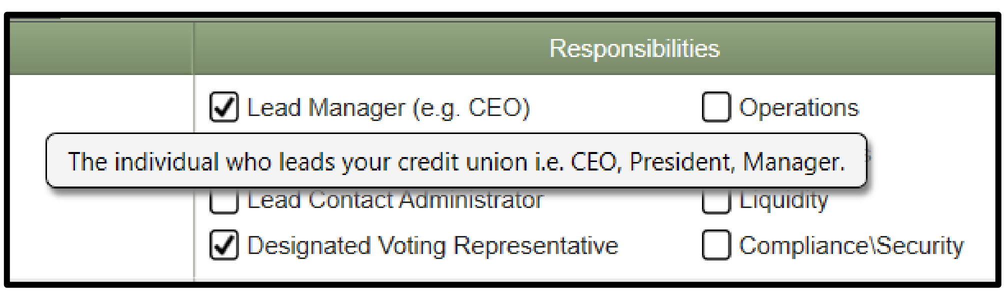
Alloya directs messages to key individuals at your credit union based on their area of responsibility. The Key Contact screen is where you can manage this list. Note that the same person can be assigned to more than one responsibility, and most responsibilities can be assigned to more than one person (e.g. your Chief Financial Officer and Chief Operations Officer may both want communications about daily operations). The Lead Manager and Designated Voting Representative can only be assigned to one contact each. You can choose from users already established in Premier View, or you can add new “contact only” users as necessary.

A user must have the Manage Key Organizational Contacts authority in Premier View in order to add/remove or modify the Key Contact list. Member Administered credit unions can refer to the Premier View Administration manual for instructions on adding an authority to a user.

This pop-up message will display each time the user(s) assigned with the Lead Contact Administrator responsibility logs into Premier View until the contacts are confirmed. Once confirmed Alloya will ask that this list be reviewed every 180 days.

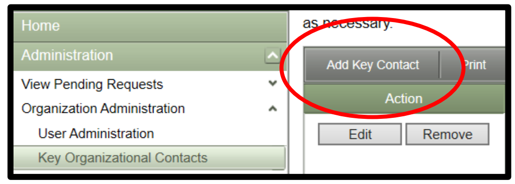


Not sure which responsibility to assign? Hover over each responsibility for more information.



Create a Key Organizational Contact

1. Administration → Organization Administration → Key Organizational Contacts
2. Click Add Key Contact
3. Choose Select existing user or Create new user. *The Create new user option is for a Key Contact only individual who does not need to access Premier View online or call in and has no authorizations assigned to them.*



If you Select existing user:

- Choose the user from the drop-down

If you choose Create new user:

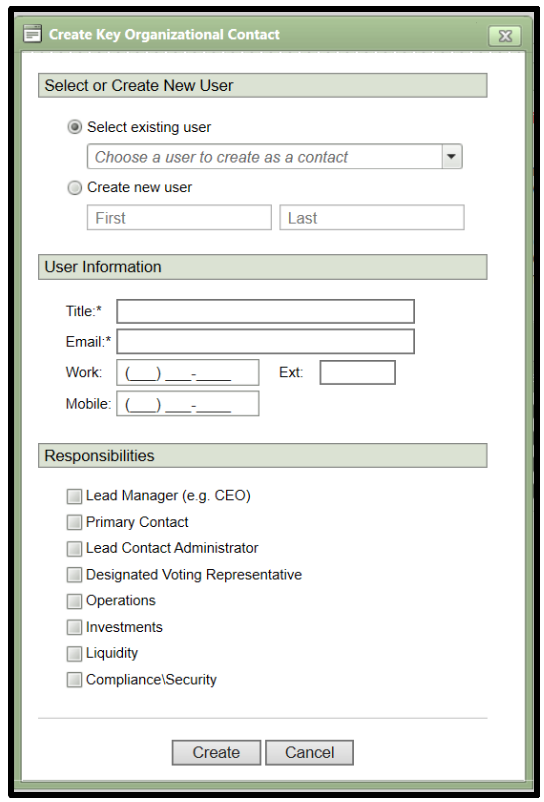
- Type in First and Last name

4. User Information – If these fields do not auto populate add the information. Asterisk (*) are required fields.

5. Responsibilities – Select one or more

   Only users with Manage Key Organizational Contacts authority can be assigned a Lead Contact Administrator.

6. Click the Create button



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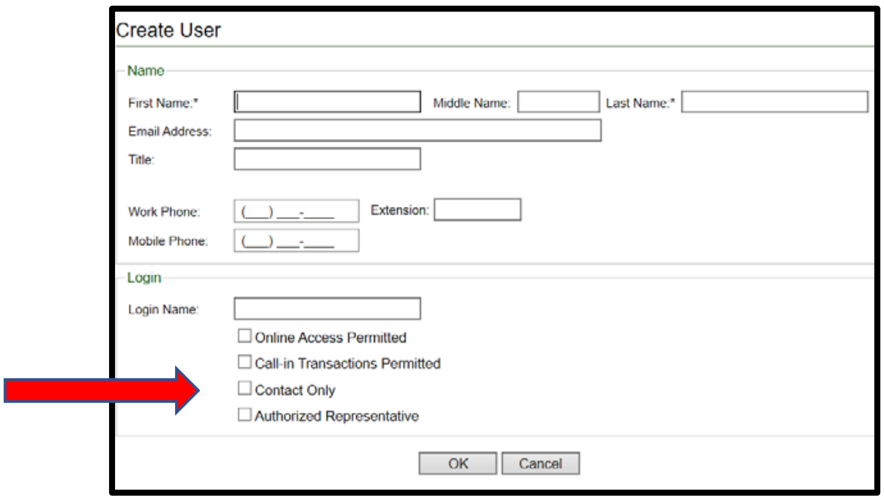
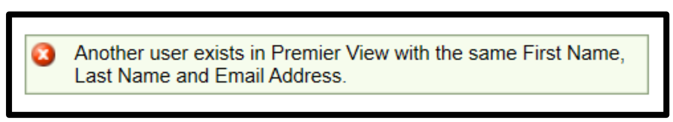
Member Administered Credit Union - A Contact only user can also be created in Premier View under Administration → Organization Administration → User Administration.

Refer to the Premier View Administration manual or Quick Reference Guide for Creating a User for detailed instructions. A Contact Only does not need a Login Name and will not have any Premier View authorities.

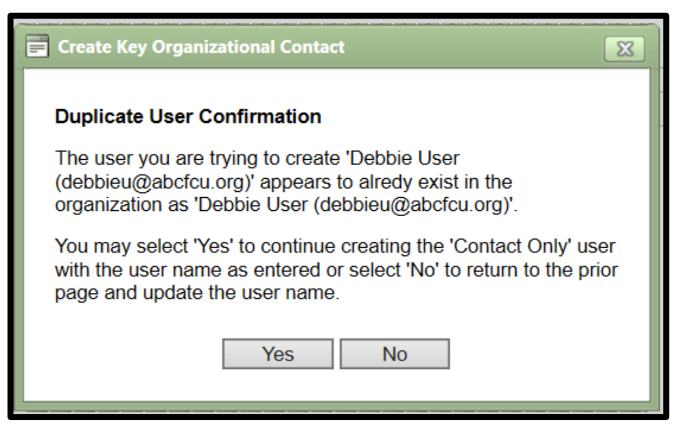


Duplicate Users

If you create a Contact only user and there is already an existing user with the same name you will get one of two messages depending on their email address.



It is possible there are two users with the same name but they should have unique email addresses.

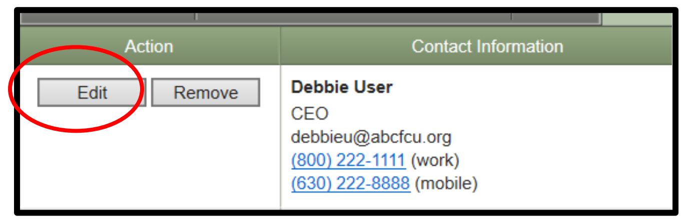


The Lead Manager and Designated Voting Representative can only be assigned to one contact each. An error will appear if you try to assign these responsiblities to another user.

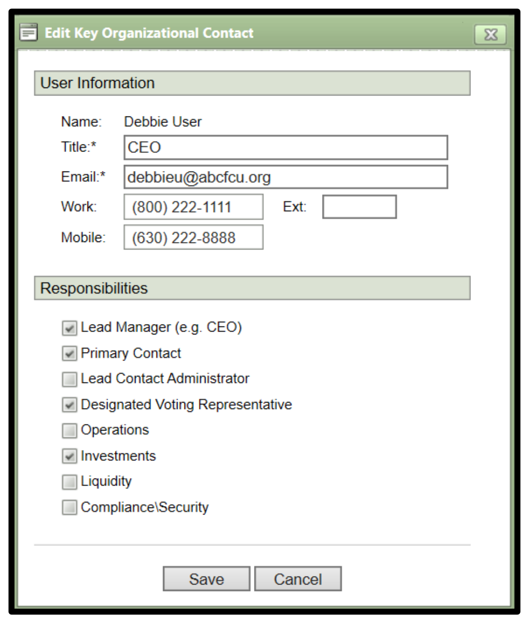
Edit a Key Contact

From the Key Organizational Contacts screen

1. Click on the Edit button under the Action column next to the individual you want to update.



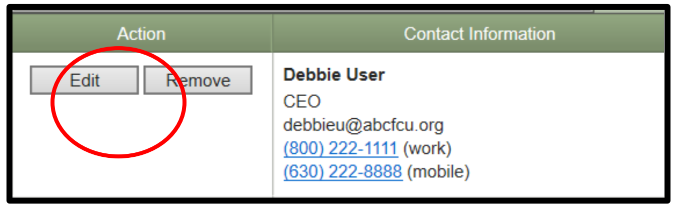
2. Update the User information and/or Responsibilities
3. Click the Save button



Remove a Key Contact

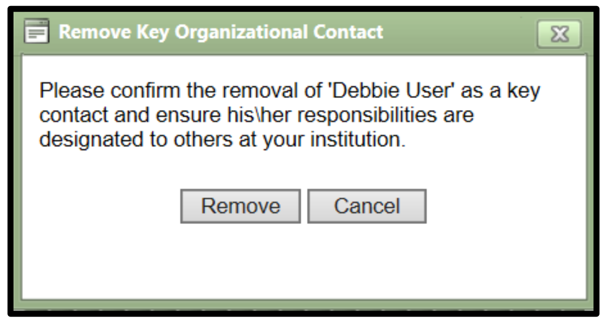
From the Key Organizational Contacts screen

1. Click on the Remove button under the Action column next to the individual you want to remove.



2. A pop-up message displays to ensure there are other contacts assigned to this responsibility.

3. Click the Remove button to continue to remove the user.

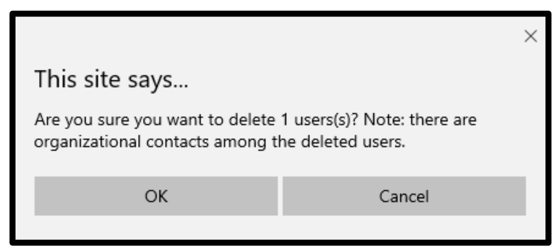


Removing a user from this list does not delete the user in Premier View. Remember to assign another contact to the responsibility.

Deleting a User - For Member Administered Credit Unions

Administration → Organization Administration → User Administration

Deleting a user under the user administration screen will remove them from the contacts once the deletion is approved. A pop-up message will display notifying you when you initially delete them.



Confirm Key Organizational Contacts

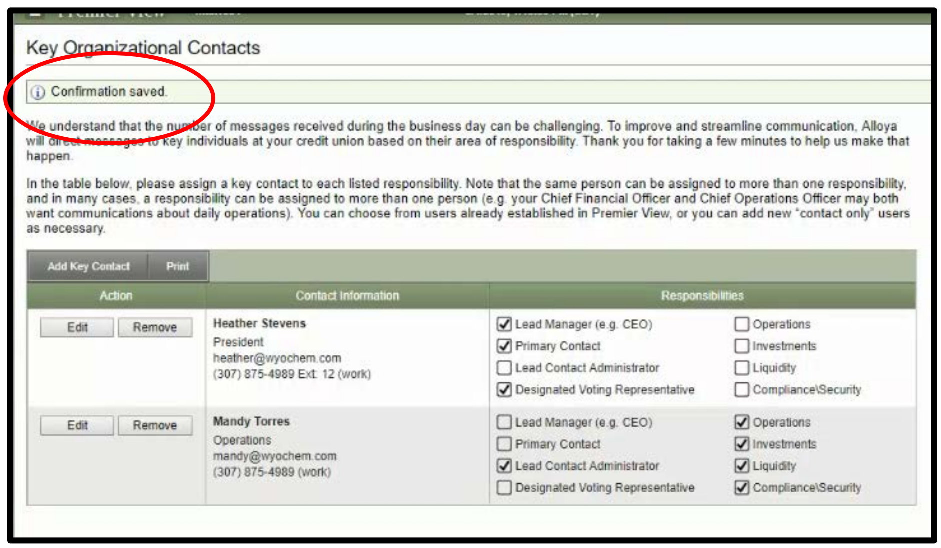
From the Key Organizational Contacts screen

1. Click the Confirm Key Organizational Contacts button once the list is accurate.

If you do not see this button it means you are missing assignment of one or more of the responsibilities.

Refer to the top of the screen for a message in red. Sample below:

Please assign the following responsibilites to a key contact: **Primary Contact**



Print

Click the Print button to print a list of the key contacts.