



# MemberDirect Small Business Information

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## Creating / Adding a Delegate

Each MemberDirect Small Business signer can create up to three delegates. Once all three have been created, the Add Delegate link will no longer be displayed on the Delegate Manager Page.

1. Login to Online Banking
2. On the Left-Hand Navigation, select “Business Services”
3. The following options will be displayed
  - a. Manage/Consolidate Accounts
  - b. Add/Modify Delegates

Click Add/Modify Delegates

4. Select Add Delegate
5. Fill in the following information
  - a. Personal Information
  - b. Create a temporary password (password will automatically be sent to the delegate)
  - c. Contact Method
  - d. Confirm the Consent Box
  - e. Choose the accounts to be shared with the Delegate

Click Submit

\*\*\*There will be a short delay of 5 minutes between receiving the username and password for your delegate.

6. Add Delegate Confirmation – Choose from the following options:
  1. Cancel – redirects back to the Delegate Manager page
  2. Edit – redirects back to the Add Delegate page
  3. Submit – displays the Add Delegate receipt page