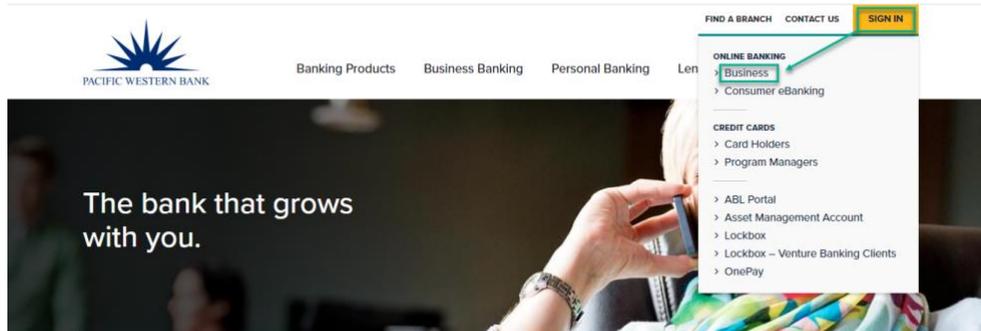


ONLINE BANKING USER GUIDE | GETTING STARTED

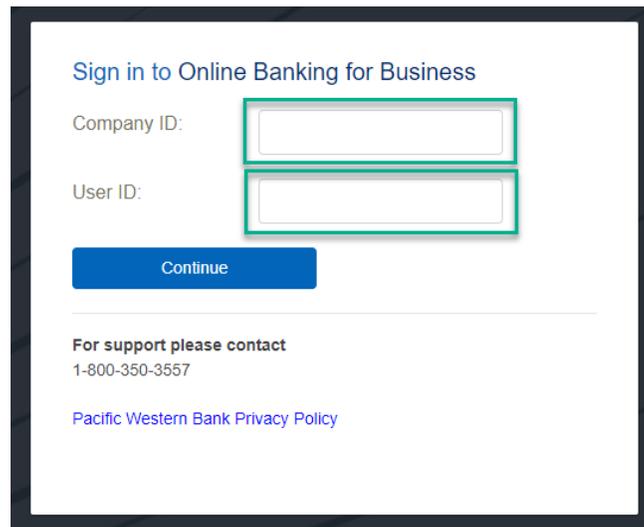
HOA PLATFORM ACCESS

1. To access the HOA Services Platform, log in to online banking at pacwest.com. In the upper right-hand corner, hover over **SIGN IN**. A drop-down menu will appear. Click **Business**.



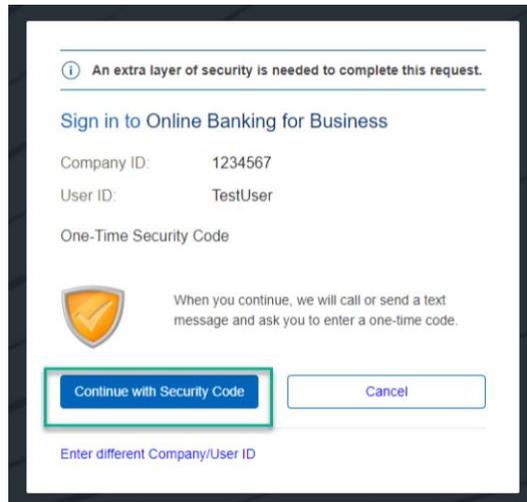
2. Enter your **Online Banking** user credentials.

NOTE: You may be required to complete a step-up verification process utilizing a one-time security code sent to you via phone or text message. This is required for a first-time user or if your device is not recognized.



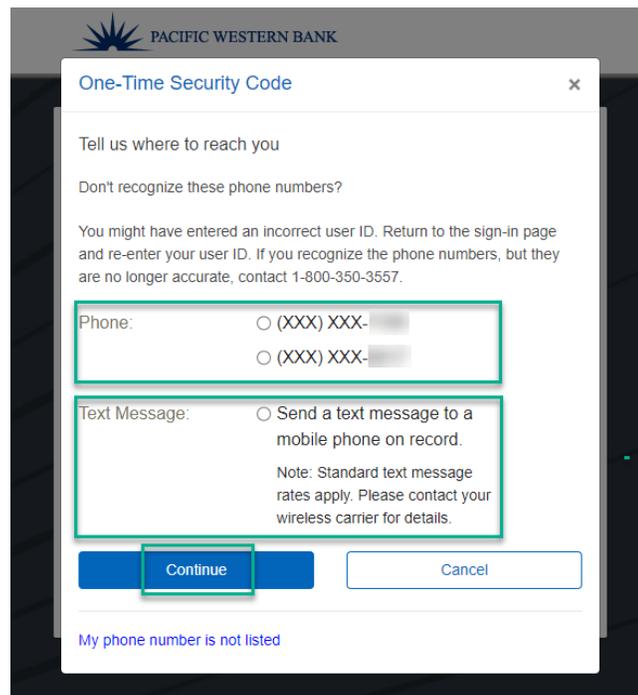
The screenshot shows the login page for 'Sign in to Online Banking for Business'. It features two input fields: 'Company ID:' and 'User ID:'. Below the fields is a blue 'Continue' button. At the bottom, there is contact information: 'For support please contact 1-800-350-3557' and a link to the 'Pacific Western Bank Privacy Policy'.

3. Select **Continue with Security Code**.

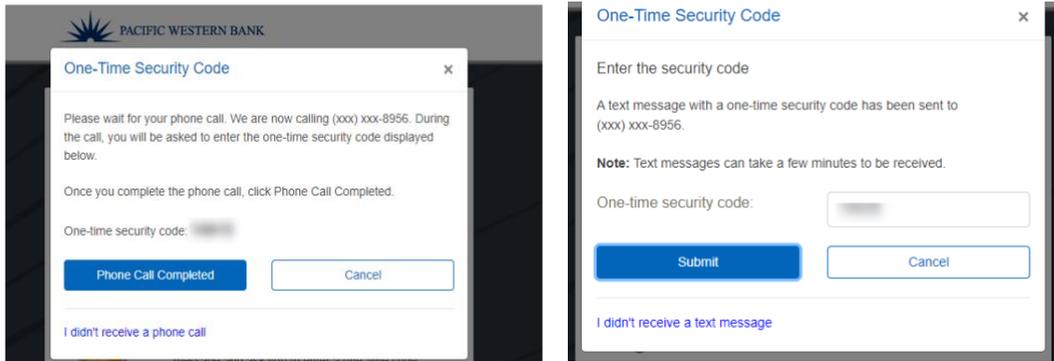


4. Your registered phone numbers will appear. Select the method in which you want to receive the security code. If you select Text Message, you will be prompted to enter the entire 10-digit phone number.

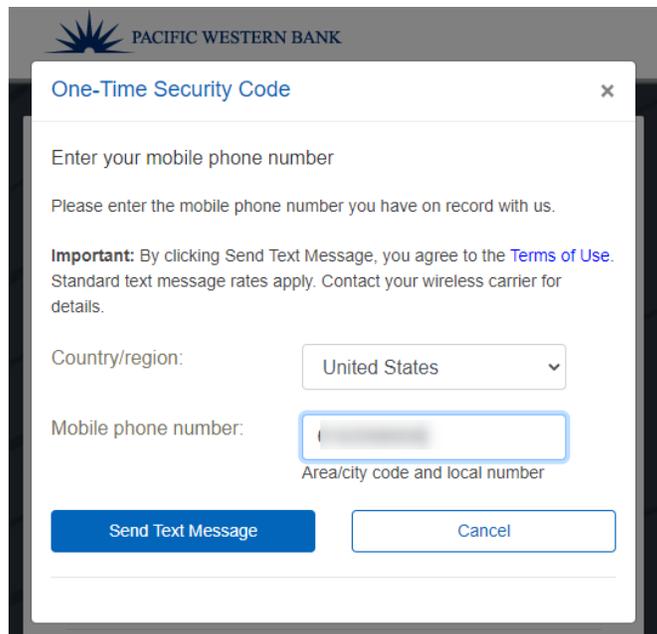
NOTE: If your phone numbers are incorrect, please verify your Company ID and User ID are correct. If so, please contact your Company's Administrator to update your contact information.



5. Click **Continue**.
6. If you select Phone, you will be required to input the security code from the screen by keying it into the phone and selecting **Phone Call Completed**. You will then be prompted to input your password.



- If you selected Text Message, you will receive a text message with the security code. You will be required to enter the security code into the page and select **SUBMIT**. You will then be prompted to input your password.



- Once logged in, hover over **Account Services** and then click **HOA Services** to access the HOA Platform.

NOTE: If you cannot see HOA Services, reach out to your Company's Administrator(s) to gain access.



ADMINISTRATOR | CREATE A USER

NOTE: Administrators can use the **Save as draft** link to save user profiles at any point in the setup process and complete the setup later. Draft user profiles remain saved until the setup is complete or they are deleted.

1. Hover over **Administration** and click **Company Administration**.
2. Under **Manage Users**, click **Create New User**.

Company Administration

Manage Users Account Information Express Account Management A

User Administration

Review the options listed below for available user administration tasks. To quickly entitle a new

New User

You will have an opportunity to copy an existing user during the process.

Create New User

3. Enter a **User ID**, temporary **Password**, **First Name**, **Last Name**, **Email Address**, and **Telephone Number**. The phone number will be used the first time the user logs in to authenticate them via a mobile or voice code. Click **Continue**.

| | |
|-----------------------------|--|
| User ID | At least four alphanumeric characters but no more than 26. Spaces and special characters are not supported. |
| Password | A temporary password the user only uses once at their first login. The password must be at least eight characters but no more than 12 and include two of the following character types: letters (a-z or A-Z), numbers (0-9), or special characters (# \$ @). |
| Extension (optional) | Required when an extension is needed to reach the user within an office phone system. Up to 16 numeric characters are allowed. |

Some phone systems require entry of additional characters, often referred to as control codes, to reach an extension. The following control codes are allowed:

- Pound (#)
- Star (*)
- Comma (short pause - approximately 2 seconds)
- Period (long pause - approximately 5 seconds)

Multiple commas and periods can be placed before or after an extension to add pause time during system-generated calls made to users to validate their information.

For example, ..12345. This example extension has a 10-second pause before the extension and a 5-second pause after. During a system-generated call, the system waits 10 seconds before dialing the extension and waits 5 seconds after it dials before playing an affirmation message such as "Hello. This is Example Company. Please press 1 to...".

- On the next screen, under **Copy Existing User (optional)**, you can copy an existing user or select **Do not copy user**.

Roles

Copy Existing User (Optional)

- Do not copy user.
- Copy User: [Select User](#)

- Choose the **User Role (Optional)**.

Allow this user to set up templates: Allows user to set up and approve templates for services and accounts to which user is entitled.

Allow this user to approve transactions: Allows user to approve transactions for services and accounts to which user is entitled.

Grant this user administrative privileges: Allows user to add, modify, copy and delete users, as well as modify their roles, services and account access, rename accounts, and modify the number of approvers required for requests.

- Click **Continue**.
- On the next page, select the **Add** icon for **HOA Services** to enable access for the user.

Services & Accounts (Optional)

To enable a service and assign accounts, click the appropriate link. To disable all services and accounts, click "Clear All".

0 of 1 services enabled

[Clear All](#)

| Service |
|--------------|
| HOA Services |



[Continue](#) [Save as Draft](#)

- Click **Continue**.
- Verify the new user's details and click **Continue**.
- Click **Create User**.

ADMINISTRATOR | CHANGE A USER'S TELEPHONE NUMBER OR EMAIL ADDRESS

1. Hover over **Administration** and click **Company Administration**.
2. Under **Manage Users**, click the link in the **User ID** column that is associated with the user.
3. Under **Contact Information**, click the **Edit** icon.

User Profile

To edit the user's profile, click the appropriate edit link. To delete the user, click "Delete User". To modify the user's system access, click the edit link. To view a different user profile, return to [User Administration](#).

User Information

Name:
User ID:
User Status:
Token Device Fulfillment Date:
Token Device Serial Number:

Contact Information

Primary E-mail Address:
Secondary E-mail Address:
Telephone Number:

4. Change the contact information as needed.
5. Click **Save changes**.

ADMINISTRATOR | CHANGE A USER PASSWORD

1. Hover over **Administration** and click **Company Administration**.
2. Under **Manage Users**, click the **System access** link associated with the user.
3. Type a password in the **Password** field.
4. Type the password again in the **Confirm password** field.
5. Click **Save changes**.

Company Administration

Manage Users Account Information Express Account Management Approval Settings User Setup Report Invalid Login Report ACH

< Back System Acce

Edit User Info

Edit user information and click "Save Changes".

[Return to User Profile](#)

User: [blurred]

User Information

Password (Optional) 

Confirm Password (Optional) 

First Name
Daniela

Last Name
flores

Additional Information (Optional)

User Locked (Optional)

[blurred text]

ADMINISTRATOR | UNLOCK A USER

1. Hover over **Administration** and click **Company Administration**.
2. Under **Manage Users**, click the **System access** link next to the user you want to lock/unlock.
3. Select the **User Locked checkbox** to lock/unlock the user. A checkmark indicates the user is locked.
4. Click **Save changes**.

ADMINISTRATOR | DELETE A USER

1. Hover over **Administration** and click **Company Administration**.
2. Under **Manage Users**, click the **User ID** for the user you want to delete.
3. Click the delete user icon.

User Profile

To edit the user's profile, click the appropriate edit link. To delete the user, click "D

To view a different user profile, return to [User Administration](#).

User Information



Name:

User ID:

User Status:

Token Device Fulfillment Date:

Token Device Serial Number:

Contact Information



4. Review the user information as needed and then click **Delete user**. The user profile is not removed until all required approvals are received.