

Electronic Statement and Notice Enrollment GUIDE



PROUD TO BE YOUR BANK, SINCE 1920 | [CITIZENS-BANK.COM](https://citizens-bank.com)



Table of Contents

Introduction2

Enrolling2

Authorizing Users to Electronic Documents4

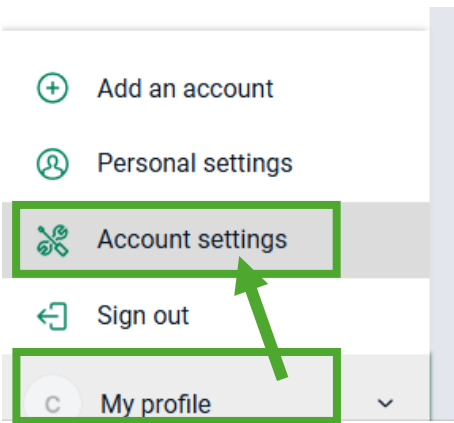
Introduction

This document explains the steps to enroll in eStatements and/or notices for your Citizens Bank & Trust accounts.

Note: The enrollment must be done by a Company Administrator.

Enrolling

- 1. Sign on to Citizens Bank & Trust Online Banking.
- 2. In the lower left-hand corner, select **My Profile | Account Settings**



3. **Select one of the accounts**, then scroll to the bottom of the next screen and select **Advanced settings**.

< Citizens Bank and Trust

TM Demo Checking 1

x7601

Display options

Display in online and mobile banking ☒

Display activity and transactions ☒

- This account will be visible on the dashboard and account pages
- You may set up and receive alerts for this account

Alerts and cards

Balance Transaction

You do not have any alerts saved.

+ Add alert

Documents

Enrolled >

Advanced settings >

4. From the *Documents* page, select **Enroll/Change**.

Documents

eStatements/Notes **Enroll/Change** Email Settings Disclosures

Instructions: Below is a list of accounts and document types that are available for enrollment in electronic delivery. You may place a check next to any document you wish to enroll or place a check next to any account(s) in which you wish to enroll all documents. If you uncheck any document or account, you will be unenrolled in electronic delivery for those applicable documents and/or accounts. No selections will be saved until you select the "Save Settings" button.

☒ Enroll All Available Accounts and Document Types Shown

Enroll Accounts

▼ ☒ TM Demo Checking 1

Enroll Available Document Types

- ☒ Deposit Statements
- ☒ Charge Back Notices
- ☒ Incoming Wire Transfer Notice
- ☒ TN7218P 1099-INT TaxMaster Reporting Form
- ☒ Repurchase Agreement Assignment Notice
- ☒ 1099-DIV TaxMaster Reporting
- ☒ 1099-MISC TaxMaster Reporting
- ☒ 1099-SA TaxMaster
- ☒ 5498-SA TaxMaster

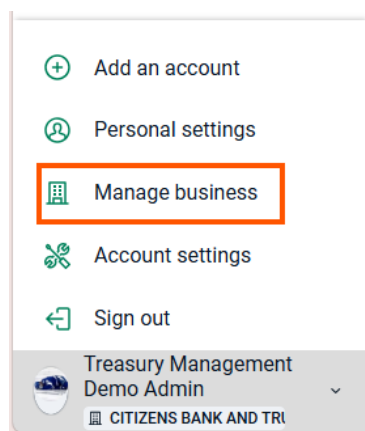
Select **Enroll All Available Accounts and Document Types Shown** if you would like all available documents delivered electronically.

If you would like to select which documents to receive electronically, expand the account(s) and select the box next to each document.

When done, select the **Save Settings** button to save the changes.

Authorizing Users to Electronic Documents

1. From the *Dashboard User Menu*, select **Manage business**:
2. Select **Users | CM Users List** from the menu.
3. In the *Select Option* drop-down for the user, select **Account Settings**



4. Select the User. Under Additional services, ensure the **eStatements/Notices** is enabled. Then, for each account the user has permission to, ensure **View all documents** is enabled:

