Website and On-line Services: Sheffield Credit Union

At Sheffield Credit Union, you can now manage most of your everyday account needs through the on-line area of our website. This guide tells you how to apply for a loan whether you are a member or not, and how to join and apply for a loan if you are not a member already.

🔞 🚳 Sheffield Credit Union	🖋 Customize 📮 0 🕂	New 🧳 Edit Page				-		Howdy, Jackie Hallewell 🖂 🔍
	Home	About News	Contact us	Find us	🏭 Join us	APPLY FOR A LOAD	N: ONLINE SERVICES >	
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	people a Yorkshir	cross So e.	outh	Riter.		Great value loans	Dans from £100 to £10,000	
	Making a Differe	nce View all >	Latest N	Vews	View	LOAN CALCULATO	on> oll Membership	

Even if you are not yet a member, you can join and apply for a loan this way.

If you know you would like to apply for a loan, click on "Apply for a Loan" – if you are not a member, it will take you through the joining process first. Have your passport or driving licence ready, if you have one. You are less likely to have to provide more information to the office if you have either of these. Use the "Join us" link instead if you simply want to join to save.

Home About News	Contact us Find us Join us APPLY FOR A LOAN ONLINE SERVICES
Sheffield Credit Union	Savings Y Loans Y Other Services Y
How	to Apply
Applying	for our personal loans is quick and easy.
If you are alr personal loa loan at the s	ready a member of Sheffield Credit Union you can apply for a an online 24/7. Not a member yet? You can join and apply for a same time on the link below.
Apply for informat	r a Loan Online: (click here after reading the tion below)
It will take a you have fin that we can	round 10 minutes to complete your loan application and once nished you will just need to send us your bank statements so begin assessing your application.
• If this is 2 years, and pro show o	s your first loan with us (or if you have not had a loan in the last) we will require your most recent 3 months bank statements sof of any other income which you have stated which doesn't n your bank statements.

When you have clicked to apply for a loan online, you will be taken to a screen where you need to indicate if you are a member already. If yes, you will need to provide your member number. If no, you will need to provide your National Insurance Number. If you do not know your member number, please ring the office on 0114 2760787 or email <u>admin@sheffieldcreditunion.com</u>.

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If you are not already a credit union member, select 'No' to apply to join the credit union.	
If you are over 18 you can apply for a loan at the same time as joining if you want to.	
Adults over the age of 16 can join as full members, but you must be 18 to apply for a loan.	
Are you currently a member of Sheffield Credit Union Ltd ?	~ ·
Next	
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If you are a member, you will be able to progress straight to the loan application

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Step 1 - Loan information	
Loan amount:	•
Loan term:	select ~
Loan purpose:	select V
If other, please state:	
	Next

You will need to work through each step, and click on "next" when you have completed that page. You can click back if you realise you need to amend anything through the process. If you aren't sure about anything – such as the loan term or loan amount, please enter the values you feel would be most suitable for you.

Step 2 - Personal Information		
Household status:		Owner Occupied 🗸
Home address:	House number / name:	1 🗸 •
	Flat number:	if applicable
	Street name:	Flat Street 🗸
	Town:	Sheffield
	District:	
	Post code	S1 2AA
Time at address:		yy × years mm × months this field required
Home telephone number:		
Mobile telephone number:		
Dependants: (under 16)		Select × this test is required
	Back	Next

You will need to complete all of the required fields, or you will not be able to progress to the next step.

In the income and expenditure section, you will need to enter something in each box, even if this is zero. Whichever column you choose to fill, the other columns should auto-fill with the equivalent amounts.

Step 4 - Income and Expenditure				
Income	Weekly	Fortnightly	4 Weekly	Monthly
Wages:	120			
Partner's wages:	0			
Tax credits:	75.00			
Child benefit:	20.70	41.40		
Pension:	0			
other (specify)	0			
other (specify)	0			
Totals	215.7	431.4		
Expenditure	Weekly	Fortnightly	4 Weekly	Monthly
Mortage/Rent/Board:	100			
Council tax:	20			
Buildings & contents insurance:	10			

Where you are ticking to agree to terms and conditions, you will see a link to click to read the guide or information that is being referred to before ticking .

DECLARATION	
I confirm that the information I have provided for this loan application with Sheffield these details are due to change in the near future, and that should they change, I reference checks and other enquiries in accordance with the data use condense information on our computer files. •(please tick to acknowledge)	I Credit Leter in two and accurate. I confirm to the best of my belief that none o in keep Sheffield Credit Uniter informed. I also authorise you to make any credi & full guides available here in relation to this application, and to hold your
If we need to contact you for any reason regarding your application, what is the best number to phone ?	

Please make sure that you follow the instructions to email, send or drop in your bank statements and proof of income, as we cannot assess your loan without this information.



If you are not already a member, you will need to follow the instructions to join as a member before completing the loan application shown above.

When you have applied, you will receive an email receipt for your application and an email showing the information you have submitted. Please check your junk box if you do not see these.

JOINING AS A MEMBER TO ACCESS SAVINGS, LOANS AND OTHER SERVICES

Please note, the membership fee must be paid in order to apply for any of our products and services, including loans.



Enter your Driving Licence number or Passport number <u>very</u> carefully. If this passes the ID check, you will not need to bring further ID to the office. If you would rather join in the office and bring your ID and proof of address, this can be done, and the joining fee will then be only £2 plus £1 savings deposit.

Step 2 - IDV					
Although optional, w (If you do not hold a with proof of your na	e recommend that you h valid driving license or p ame and address at a lat	nave a valid driving licence or passport, we will attempt to ve er date.)	passport so that we can o rify your identity without th	heck your identity electroni his information. Please be a	cally. ware you may need to provide us
Driving licence num	ber				
	MORGA	5. MO 657054	RGABS7054SM9U 36	IJ	
Passport number					
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Next of kin is required – this should be somebody who you would wish to leave your savings to should anything happen to you.

Step 3 - Next of KIN		
Next of kin full name:		
Relationship to you:		
Next of kin address:	House number / name:	
	Flat number:	if applicable
	Street name:	
	Town:	
	District:	
	Post code:	
Contact telephone number:		
	THIS PERSON WILL BE REGISTERED	AS YOUR BENEFICIARY ACCOUNT

The additional information is useful to us. If you select "do" accept marketing and wish to have statements by email, we will only send this from Sheffield Credit Union. We do not send marketing from other companies. This helps us to keep you informed, and reduces the damage to the environment.

Step 6 - Additional information	
Landlord (if none please write n/a) *	SCC
How did you hear about us? •	radio advert \sim
If other, please state ·	n/a
Do you consider yourself to have a disability/limiting long term illness that may affect your ability to access our services?	no v
Do you have any mental health or mental capacity issues that you believe may affect your ability to manage your money or understand the terms and conditions of your account ? $\ \cdot$	no v
Marketing & Taxation	
Choose if you wish to receive annual statements from the credit union via email. Statements not sent via email will be sent via post.	do 🗸
Choose if you wish to receive promotional information from the credit union via email. $\ \star$	do 🗸
Do you pay tax outside of the United Kingdom ? *	No

Once you have completed your application, you will be invited to apply for a loan straight away. Please complete all the fields and follow the instructions, or simply close the screen if you simply wish to join and save at this point.

Again you will receive a receipt for your membership application and a copy of what you have submitted in an email, along with reminder instructions of how to pay your membership fee. Please check your junk box if you do not receive these.

On-line Services: A Guide to your 24-7 account access

So, you are a member and you want to access your balances, make withdrawals and see your transactions on-line. How do you do this? Click on "ONLINE SERVICES"



Click to "Register Here" if it is the first time you have visited the on-line area.

Sheffield Credit Union	O	NLINE SERVICES
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Membership Number:	â	Not yet registered?
PIN:	₫ Φ	It's free & easy to register. 24/7 access to your account.
Date of Birth:	dd v / mm v / yy v	check your balances view a mini statement transfer money
TO USE TH	E ONLINE AREA YOU MUST BE A MEMBER	apply online for a loan amend personal details request or print forms send an online enquiry
AND HAVE REC	SISTERED FOR IT: REGISTER HERE / JOIN HERE	bontact the credit union

Complete all parts of the simple registration form and click the blue button at the bottom to register.

Please cor	mplete this f	form to register for the	It's easy to register free.	and it's
	Membe	ers' Area	You can access you	r account
Fields marked with an " *" an	e mandatory.		24/7 keeping you ri date.	ght up to
Membership number:		•		
Full name:		*	→ check your balance	es
First line of address and post	code:	Address line 1 Postcode	→ view a mini staten	nent
Date of birth:		dd ✔ / mm ✔ / yy ✔ *	→ transfer money	
NI number:		*	→ apply online for a	loan
Home phone number:		Enter without spaces	amend nersonal d	otaile
Mobile phone number:		Enter without spaces		
E-mail address:		*	··· request or print to	rms
Your 'PIN' is required each tin	me you want to login to	the members' area	→ send an online end	quiry
Enter your preferred 4-digit P	PIN	*		
Confirm your PIN		*		
Your 'login password' is requir	red each time you want	to login to the members' area		
Note: This password is case s	sensitive, please use sor	nething memorable.		
Enter your login password		*		
Contirm your login password	ord' is required each the	*		
Your share withdrawal passwo	ord must be between 6	and 12 characters with at least one digit, one u	pper	
case letter, one lower case let	tter and one special syn	nbol ("!@#\$%").		
Share Withdrawal Password:		*		
Confirm your Share Withdraw	val Password:	*		
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Once you receive your email confirmation, you can go back to "ONLINE SERVICES" and log on by entering your details. Make sure you keep your passwords and PIN number safe, and do not tell these to anybody else.

AND REGULATED BY THE PRUDENTIAL REGULATION AUTHORITY AND THE FINANCIAL CONDUCT AUTHORITY. FRN X00000X, FOR DETAILS VISIT: WWW.FCA.ORG.UK/REGISTER

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	400	Not yet
Membership Number:		registered?
PIN	•••• <u>ā</u> ©	It's free & easy to register.
		24/7 access to your account.
	01 • / 01 • / 80 •	check your balances
Date of Birth:		view a mini statement
	NEXT	transfer money
		apply online for a loan
		amend personal details
TO USE THE	E ONLINE AREA, YOU MUST BE A MEMBER	request or print forms
AND HAVE REGI	STERED FOR IT' REGISTER HERE / JOIN HERE	send an online enquiry
Forgotten your PIN	? - click here Forgotten your Login Password ? - click here Forgotten both ? - c	ontact the credit union

Complete your details on the screen, clicking NEXT and entering your password at the next screen, then "LOGIN". If you have forgotten either your password or your PIN, follow the instructions on the screen.

Sheffield Credit Unio	n	ONLINE SERVICES
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Password: Forgotten your F	Please enter your login password	Not yet pegistered? Its free & easy to register. 24/7 access to your account. check your balances view a mini statement transfer money apply online for a loan amend personal details request or print forms send an online enquiry

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At the summary, click to continue.

You are now in your secure area. On the right is a list of what you can do here. Click on each one to explore your account and the functions that are available.

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	BALANCE ENQ	Balance enquiry Contact Us Downloadable for Loan application	ms
Shares & Savings	Balance	Loan calculator	
Christmas Account	£60.00	View Statemen	
Main Share Account	£116.51	My 'Inbox'	0
		My 'Documents'	•
		Withdrawal reques	st
Loans	(Loan ba Balance	Iances do not include any accrued interest)	
Loan 1	£181.58	View Statement	
You currently have 1 missed payments o The total of your arrears is £20.43, please	n your Loan 1 account. e contact the office on 0114 252 ⁻	932.	
	Last updated: 18 April 2016	at 15:24	

From the Balance Enquiry screen, you can click on "View Statement" to see your transactions. The following sections will take you to another part of our website, where you can find the information or form or make the application you require:

- Downloadable forms
- Loan application
- Loan calculator

Contact Us will bring up a separate box for you to send a secure enquiry to us. We will contact you in response as soon as we can.

Withdrawal request			Contact Us	
			Downloadable forms	
Select account to transfer from:	Select	*	Loan application	
			Loan calculator	
How much would you like to transfer?	£	*	My information	
			My 'Inbox'	
Bank details of receiver			My 'Documents'	
			Withdrawal request	
	Select from your stored accounts (if any)		Logout	
Sort code:		*		
Account number:		*		
Building society roll number or reference:				
S	ecurity			
Please confirm your share withdrawal password:		*		
If you have forgotten your share withdrawal password you	must contact the credit union office on (0114) 276 0787			

The most popular use of the on-line area is "Withdrawal request".

You can withdraw from your Share 1 and Share 2 accounts. You must enter the bank sort code and account number very carefully as we will send your money to the details you enter here. Do not enter a reference unless you have a Building Society roll number. Any other reference will be regarded as a bill payment and you will be charged £2. If you have registered a bank account with us, this will appear in your "stored accounts" box.

We hope you find the on-line area easy to use. If you need any further help or information, please call 0114 2760787 or email <u>admin@sheffieldcreditunion.com</u>.