

Chase Account Management

06/25/2025 11:20 am PDT

Add New Users to your Chase Account

1. Review Specified User Information to use in Account Creation:

Name: **Wesley Lindquist**

Phone Number: **(619) 940 6526**

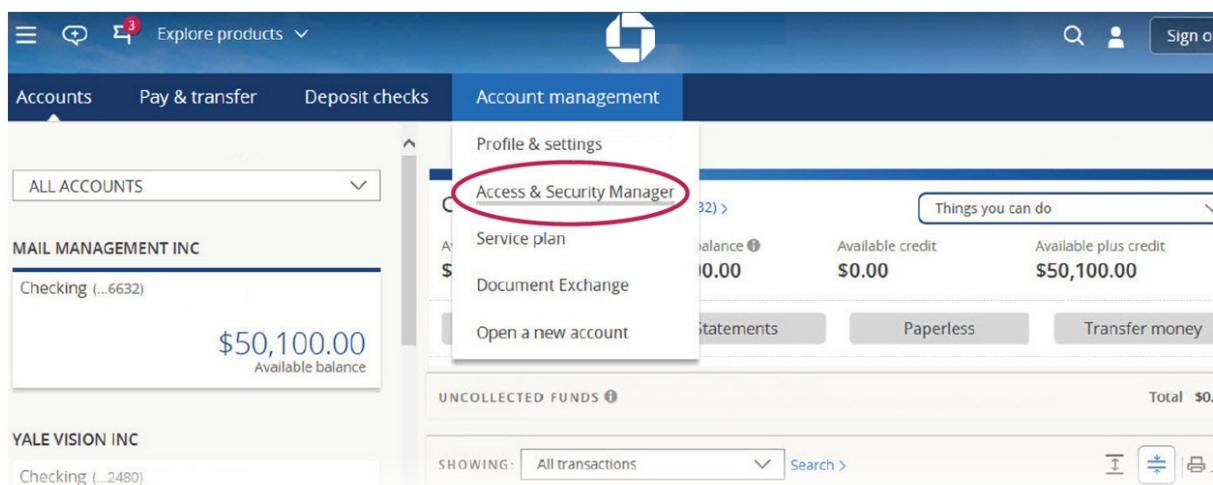
Email Address: **This is specified in the email you received from us to initiate this new access request.**

Username: **This is specified in the email you received from us to initiate this new access request.**

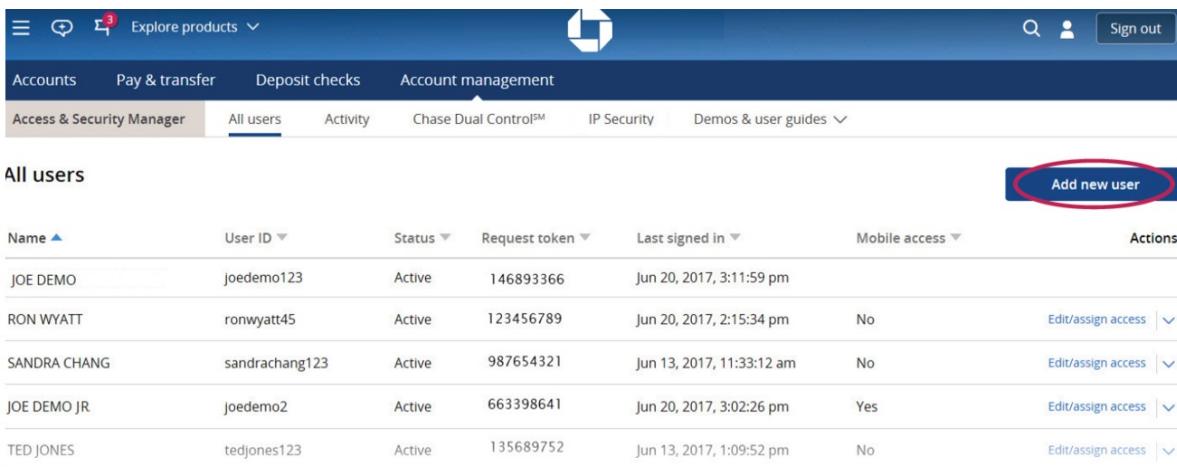
2. Access the System:

Log in with your Chase Account

Navigate to Account Management → Access and Security Manager

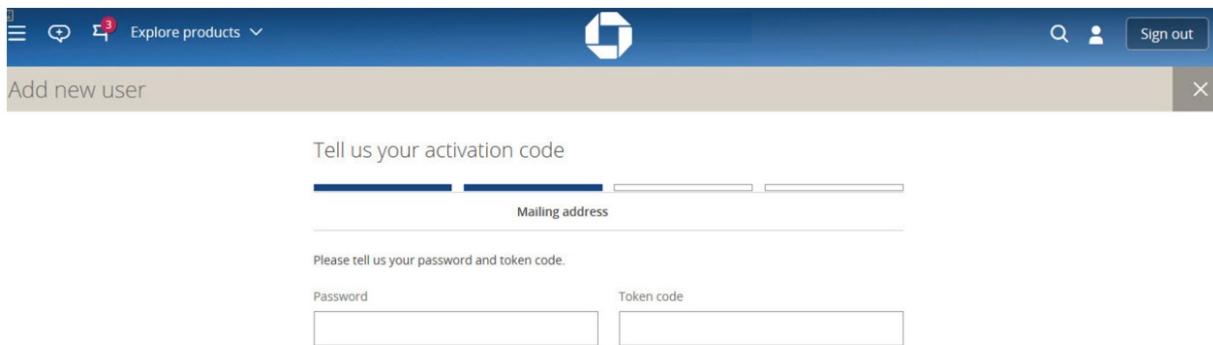


3. Add a new user.



All users						
Name	User ID	Status	Request token	Last signed in	Mobile access	Actions
JOE DEMO	joedemo123	Active	146893366	Jun 20, 2017, 3:11:59 pm		
RON WYATT	ronwyatt45	Active	123456789	Jun 20, 2017, 2:15:34 pm	No	Edit/assign access
SANDRA CHANG	sandrachang123	Active	987654321	Jun 13, 2017, 11:33:12 am	No	Edit/assign access
JOE DEMO JR	joedemo2	Active	663398641	Jun 20, 2017, 3:02:26 pm	Yes	Edit/assign access
TED JONES	tedjones123	Active	135689752	Jun 13, 2017, 1:09:52 pm	No	Edit/assign access

4. Password and Token Code (if applicable) will need to be provided to access the next steps.



Tell us your activation code

Mailing address

Please tell us your password and token code.

Password	Token code
<input type="text"/>	<input type="text"/>

5. Fill in the required information for your new user, you will need to create a Username and fill out the following details using the specified credentials below and in our account access request email to you:

First Name: **Wesley**

Last Name: **Lindquist**

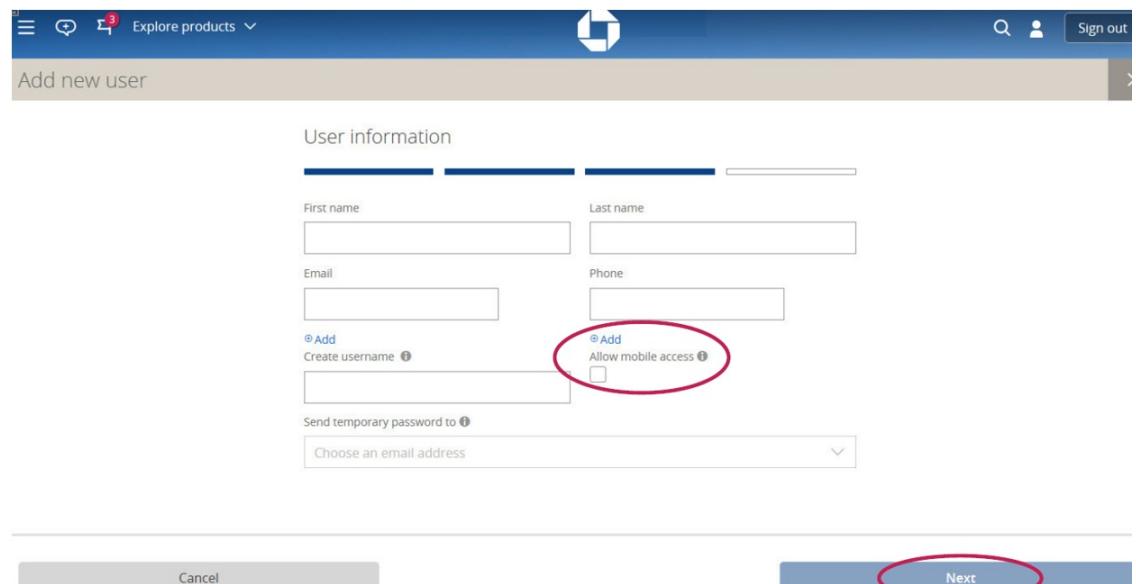
Email Address: **Specified in our email to you**

Phone Number: **(619) 940 6526**

Username: **Specified in our email to you**

Allow mobile access: **Unselect**

Send the temporary password to: **Specified in our email to you**



The screenshot shows a user interface for adding a new user. At the top, there are navigation icons and a 'Sign out' link. Below that, a 'User information' section is displayed with a progress bar. The form includes fields for First name, Last name, Email, and Phone. There are two radio buttons for 'Create username': one for 'Add' (selected) and one for 'Add' (unchecked). A red oval highlights the 'Allow mobile access' checkbox, which is also unchecked. Below the form, there are 'Cancel' and 'Next' buttons, with 'Next' also circled in red.

6. Create Username, uncheck "Allow Mobile Access, click "Next".

⊕ Add
Create username 

Send temporary password to 

Choose an email address

7. Assign User Access Level:

Accounts Pay & transfer Collect & deposit Account management

Access & Security Manager All users Account activity Chase Dual ControlSM IP Security Help & support ▾

 You've added an authorized user 

Be sure to give this username to JOE DEMO and tell him or her to expect an email with a temporary password to sign in for the first time.

We'll ask new users to tell us some personal information the first time they sign in.

Manage account access

JOE DEMO

Username	Status	Mobile access
joedemojr456	SUSPENDED	YES
Phone number(s)	Email address(es)	
555-555-5555	joedemojr@yalevision.com	

Important! If you've turned on Chase Dual ControlSM, please be sure you have at least one other user who can review and approve those transactions.

[Learn more about statements >](#)

▼ YALE VISION INC

Access level  

▼ YALE VISION INC

Checking (...6268)	Assign access > 
Checking (...7035)	Assign access >
Savings (...9917)	Assign access >
Savings (...5095)	Assign access >

8. When you click Assign access, you should choose the access level for each account we need and select **See Activity Only and Allow Access to See Statements & View Check Images**, for all other accounts that Precision Financial LLC does not need please select **No Access**.

- **No access.** Leave the drop-down list alone. Your authorized user won't have access to this account. Every account is automatically at this level until you assign one of the other options.
- **See activity only.** Your authorized user can see account information but can't initiate transactions. In addition to online activity, Precision Financial will need access to see statements, & view check images. We do not need access to approve transactions initiated by other users.