

24-Hour Phone Teller Menu Guide

To use as a wallet guide, print this page, then cut and fold where indicated.

HERITAGE
credit union



24-HOUR PHONE TELLER

Toll-Free: 877-24TELLER/877-248-3553

In Madison: 608-241-2192

Para español oprima **2**

The default is **Voice Response**

Press **1** to use **Touch Tone**

At any time, press **3*** for **Main Menu**

To repeat an option, press **#**

For the previous menu, press *****

MENU OPTIONS

1. Account Balance & History

Account Balance > Press or say **1**

Account History > Press or say **2**

2. Activate a Card

Enter card number and follow prompts

3. Funds Transfer

Transfer Funds > Press or say **1**

Schedule a Funds Transfer > Press or say **2**

Hear Existing Scheduled Transfers > Press or say **3**

Delete an Existing Transfer > Press or say **4**

4. Interest Rates (when available)

5. Stop Payments

Stop a Payment > Press or say **1**

Stop Payment Inquiry > Press or say **2**

6. Share or Loan Withdrawal

Checking Account > Press or say **1**

Savings Account > Press or say **2**

Loan Account > Press or say **3**

7. Pending Transactions

Enter your member number and account ID, and follow prompts to hear pending ACH transactions

8. Change My (Phone Teller) PIN

Enter your new 4-digit Phone Teller PIN

Entering Member Number & PIN

When asked, enter your member number (account number), then **wait** for the prompt to enter your PIN

Account ID Numbers

Your account ID number is the two-digit number following your member number that identifies each savings or loan account

Prime Share	_____	Checking	_____
Certificate	_____	Savings	_____
Home Equity	_____	Loan	_____
Mortgage	_____	Loan	_____

Account Balance

The account balance and history option provides the current balance and available balance (current balance minus any pending transactions) > Go to **Main Menu**,

press **1** for account balance and history, then press **1** again for account balance

Checks & Deposits

You can search for transactions by **date(s)**, **amount/range** or **check number** > Go to **Main Menu**, press **1** for Account Balance & History, then press **2** for account history and follow prompts

24-Hour Phone Teller PIN

You can change your PIN using Menu Option 8, but it must be a **new** number — you cannot reuse a PIN. If you haven't used 24-Hour Phone Teller before, the system will prompt you to select a PIN the first time you call.

Questions? Call us during business hours at 888-432-8496.

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