



## Desktop External Account Transfers

External Account Transfers allow you to securely move money between your Credit Union account and accounts at other financial institutions.

### External Account Transfers Step-by-Step

Use the following steps to set up an external transfer.

Step	Action
1	Click the <b>Make a Transfer</b> menu at the top of the screen.
2	Click the <b>Add External Account</b> hyperlink at the top of the screen.
3	Click to select the <b>Verification Method</b> (Text, Voice, or Email) using the drop-down arrow.
4	Click and enter either a <b>10-digit Phone Number</b> or an <b>Email Address</b> using the drop-down arrow to receive a verification code.
5	Optional: Click the <b>Cancel</b> button to exit the verification process.
6	Click the <b>Next</b> button.
7	Check your email or phone for the verification code.
8	If prompted to review a disclosure, click <b>I Agree</b> to continue. If not, simply continue.
9	Click and enter the <b>Verification Code</b> in the Verification Code field.
10	Click the <b>Next</b> button.
11	Optional: Click the <b>Cancel</b> button to exit the verification process.
12	Optional: Click the <b>Request New Code</b> hyperlink to generate a new code.
13	Click the <b>Input Manually</b> button at the right of the screen.
14	Click the <b>Search for a financial institution</b> field and enter the name of the external financial institution, <b>or</b> Click the corresponding financial institution <b>file</b> .
15	To narrow your results, use the <b>Sort by</b> filter hyperlink to arrange the financial institution files in one of three ways: <ul style="list-style-type: none"><li>• Popularity</li><li>• Name (A-Z)</li><li>• Name (Z-A)</li></ul>
16	Click the <b>Show More</b> button to see additional financial institutions.
17	Optional: Click the <b>I can't locate my financial institution</b> hyperlink if your financial institution is not listed.



## External Account Transfers Step-by-Step, continued

Use the following steps to set up an external transfer.

Step	Action
18	Optional: Click the <b>Learn More</b> hyperlink for a visual showing the location of your <b>Routing</b> and <b>Account Number</b> on a check.
19	Click and <b>enter the following information</b> in the corresponding fields: <ul style="list-style-type: none"><li>• Routing Number</li><li>• (Optional) Account Nickname</li><li>• Account Number</li><li>• Confirm Account Number</li></ul>
20	Click to select the <b>Checking</b> or <b>Savings</b> radio button (circle icon).
21	Optional: Click the <b>Cancel</b> button to stop the external transfer setup request.
22	Click the <b>Connect</b> button.
23	The <b>Request Accepted</b> confirmation appears.
24	Optional: Click the <b>Make a New Transfer</b> button to start a new transfer.
25	Optional: Click the <b>Add Another Account</b> button to add another account.
26	Review the <b>Next Steps</b> for further information.
27	A pending status is indicated by an <b>Information</b> (  ) icon displayed next to the <b>External Accounts</b> menu on the left side of the screen.
28	Monitor your external bank account for <b>two micro-deposits</b> that will be sent for verification.
29	After both deposits have been made, click the <b>Make a Transfer</b> menu at the top of the screen.
30	Click the <b>External Accounts</b> hyperlink at the left of the screen.
31	Click the drop-down arrow of the <b>External Account</b> shown in an <b>Account Pending</b> status.
32	Click the <b>Verify Account</b> button.
33	Optional: Click the <b>Edit</b> (  ) icon to update the <b>Account Nickname</b> .
34	Optional: Click the <b>Delete</b> hyperlink to cancel the account verification.
35	Access the external account you want to transfer to and review your recent transactions. Locate the <b>two micro-deposit</b> amounts, then enter each amount into the corresponding fields provided. <ul style="list-style-type: none"><li>• Deposit Amount 1</li><li>• Deposit Amount 2</li></ul>
36	Click the <b>Verify</b> button.
37	Optional: Click the <b>Cancel</b> button to stop the <b>Trial Deposit Verification</b> .
38	Verify the account shows a <b>green checkmark</b> and <b>Active</b> under the institution name.