

# Enhanced Digital Banking How-To Guides

# **External Transfers - Adding Account**

| <b>Step 1</b><br>From Menu on top screen, select "Make<br>a Transfer"     | View my<br>Accounts | Make a<br><b>Transfer</b>   | Apply for a<br>Loan |
|---|---------------------|---|---------------------|
| Then locate menu on left side of screen<br>and select "External Accounts" |                     | ransfers         New Transfer         Scheduled Transfers         Transfer History         External Accounts () |                     |
| <b>Step 2</b><br>Locate and select "Add Account"                          | Manage              | External Acco   | punts               |

# Step 3

Review Terms and Conditions and select "Accept & Continue"



# Step 4

Select "Instant Account Verification" (see step 5) or "Manual Account Input" (please see step 8 on page two of this document).

# **Step 5 - Instant Verification**

Select "Get Started"

| Instant Acco          | unt Verification                            |
|-----------------------|---|
| Add your externation. | rnal account through selecting your banking |
|                       | Get Started                                 |
|                       |   |

## Step 6

Locate the other financial institution. Select financial institution from list of popular institutions or search for the financial institutionusing search bar at the bottom of the page.

| 1. SELECT A S  | TE 2. VERIFY CI | REDENTIALS 3. | VIEW ACCOUNTS                    |
|--|-----------------|---------------|----------------------------------|
| Select your institution from the list below or search. $\ddot{\phi}$ |                 |               |                                  |
| Citberk  | U.S. Bark       | PNC Bark      | Fidelity<br>Fidelity Investments |

Select the chosen financial institution once located.

Note: if the financial institution name does not appear, this service is unavailable through that financial institution.

# Step 6

Enter the requested credentials (this may vary depending on financial institution.

Select "Submit"

| User ID           |        |
|-------------------|--------|
| Password          | •••    |
| Re-enter Password | -      |
| < BACK            | SUBMIT |

# Step 7

Verify credentials (some financial institutions will require a one-time pin).

Once verified, you will be able to see external account.

#### **Step 8 - Manual Account Input**

Select "Input Manually"

| nput your : | account and routing numbers manually | (usually |
|-------------|--------------------------------------|----------|
| akes 2-3 b  | usiness days for verification)       |          |
|             |                                      |          |
|             |                                      |          |

# Step 9 - Manual Account Input

Use "Search for a financial institution" tool and select the financial institution from the drop down menu. If bank name is not found select "I can't locate my financial Institution."



# Step 10

Enter the following account details:

- Routing number
- Account nickname
- Account number
- Confirm account number
- Select from radio dial the account type
  - Checking
  - Savings
  - Loan

Then, select "Connect"

## Step 11

Request Accepted Message It can takeup to 3 business days to complete penny verification.

Connect

#### / Request Accepted

Account Type

) Checking

Your request to connect your account at CANVAS CREDIT UNION has been accepted.

60

O Savings

Account Nicknam

Personal Checking

Confirm Account Numbe

Cancel

6

C Loan

#### Next Steps

 Wait for two small trial deposits to appear in your CANVAS CREDIT UNION account. This process can take up to 3 business days to complete.

 Return to online banking and enter the deposit amounts to complete the verification process.

## Step 12

Verifying Penny Verification Amounts Select "Make a Transfer from Menu" and select "External Accounts"

Note: If there is an exclamation point icon next to this option, there are accounts that need to be verified.



# Step 13

Locate the account being linked in "Account Pending" status.

Select the account.

|   | Manage | Add Account       |                   |
|---|--------|-------------------|-------------------|
| • | ±      | Personal Checking | *2345<br>Checking |

—— External Transfers - Adding Accounts, continued.

| <b>Step 13</b><br>Select "Verify Account   | Trial Deposit Verification           Verify Account |
|--|---|
| <b>Step 14</b><br>Enter both penny verification amoun<br>from your other financial institution). | nts (found  |
| Select "Verify"  | Deposit Amount 2                                    |

# Troubleshooting

If the penny verification fails three times, the system will lock the account. Please contact US Eagle to unlock the account.

|   | Manage | Add Account                       |                   |
|---|--------|-----------------------------------|-------------------|
| - | Ē      | Personal Checking  Account Locked | *2345<br>Checking |

Cancel

\$ 0.00

Verify

You have exceeded the number of allowable attempts. As a security measure, we have locked your request.

If you have any questions, please feel free to call us at 505-342-8888 or 888-342-8766, or schedule an appointment with us by visiting **useagle.org/appointments**.

