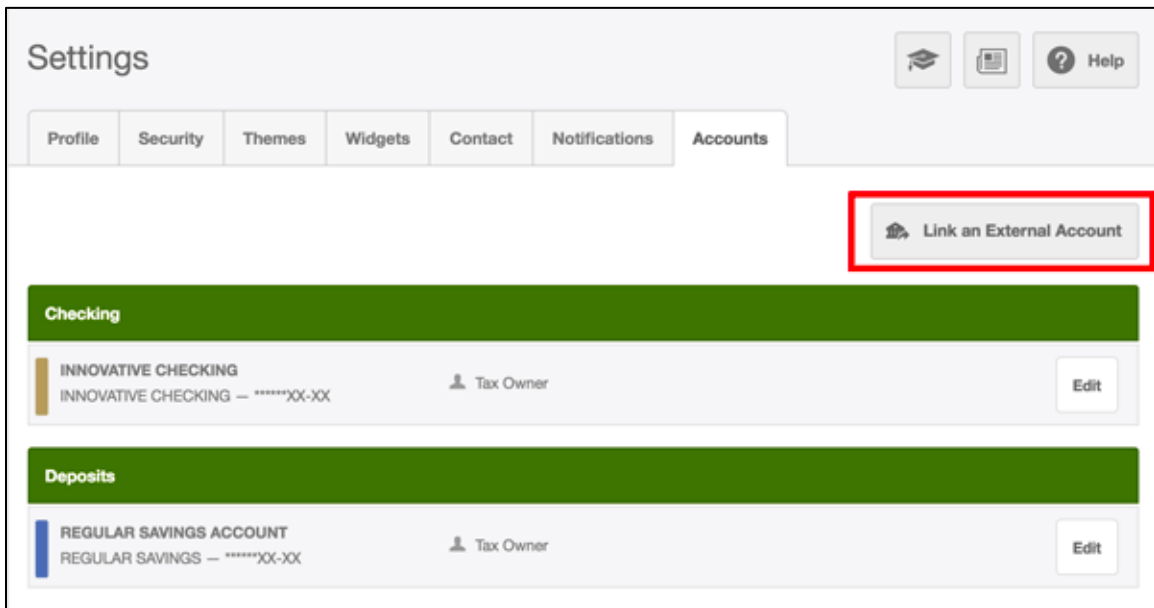




## Setting Up a Linked External Account

Connexus Credit Union members have the ability to transfer funds from their Connexus account to an external account (an account at another financial institution) through Online & Mobile Banking without having to write a check or otherwise physically move funds from one financial institution to another.

In order to start transferring funds to an external account through Online & Mobile Banking at Connexus Credit Union, members must first request this functionality by sending a secure message through Online & Mobile Banking. In order to use this functionality, members must meet certain qualifications, such as having been a member of Connexus Credit Union for at least 30 days. Once this functionality has been enabled, members can link their external account using the desktop version of the online banking experience. Select the "Accounts" tab under "Settings" and click "Link an External Account."



Enter the routing number for the external financial institution and account number as prompted. A nickname can be assigned to the external account in order to help identify it.

The screenshot shows a form titled "Add Account at another bank" with a close button (X) in the top right corner. The form contains the following fields:

- Account Type:** A dropdown menu with "Checking" selected.
- Routing Number:** A text input field containing "000000000" with a small "SOME OTHER FI" label below it.
- Account Number:** A text input field containing "000000000000".
- Confirm Account Number:** A text input field containing "000000000000".
- Nickname:** A text input field with a question mark icon and the text "EXTERNAL ACH ACCT".

At the bottom right of the form are two buttons: "Cancel" (grey) and "Save" (orange).

Check the external account through the original financial institution for transfers of small amounts (less than \$1.00) originating from Connexus Credit Union. These transfers are used to verify the external account, and will be rescinded once external account setup has been completed.

It may take up to three business days for these test transfers to appear in the external account.

The screenshot shows a confirmation screen titled "Confirm Your External Account".

Text: "As a security measure, you **cannot** transfer funds to or from this account until it has been confirmed."

**1**

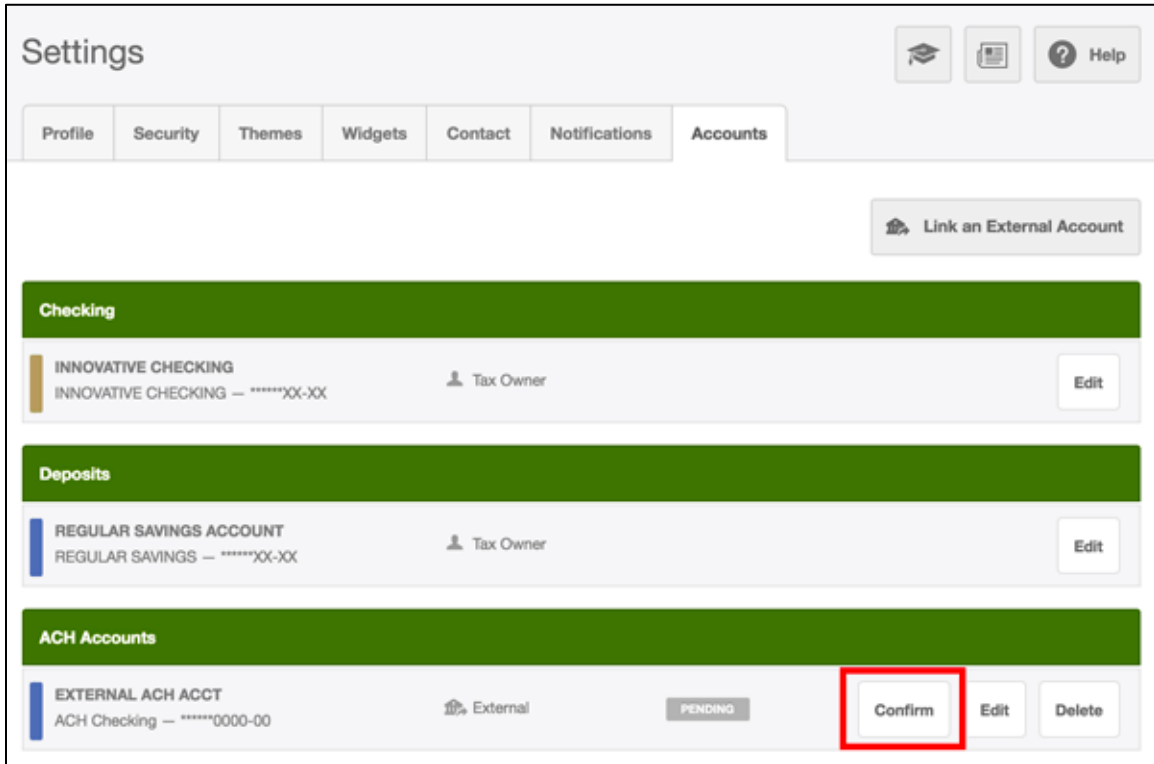
We will send two (2) deposit transactions to this account.  
It may take up to three business days to appear in the transaction history.

**2**

Go to **Settings** and click on the **Accounts** tab to confirm the external account.

At the bottom right is an orange "OK" button.

To finish linking the external account to the Connexus membership, click the “Confirm” button next to the pending external account under the “Account” tab under “Settings.”



Enter the amounts that had been transferred to the external account by Connexus for verification purposes and click the “Confirm” button.

**Confirm Trial Deposits**

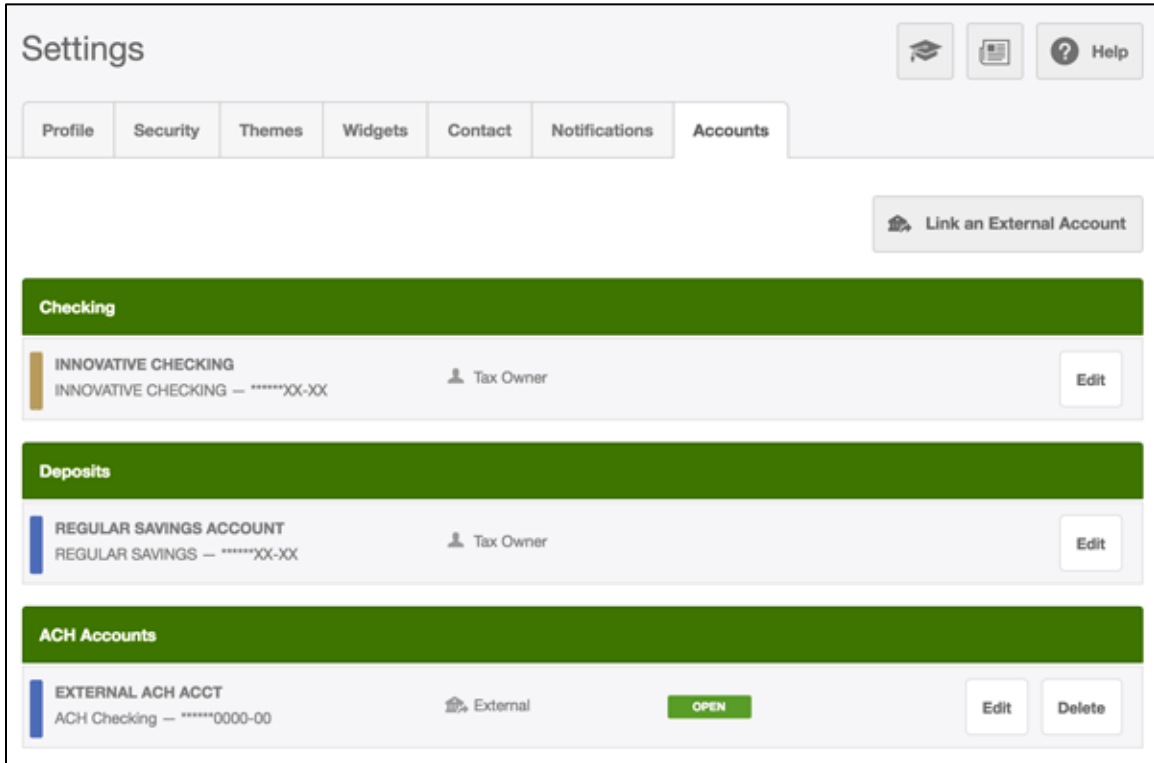
As a security measure, we sent two transactions of different amounts to account #000000000000 at SOME OTHER FI. It may take up to three business days for those transactions to appear in your account.

We ask you to confirm the transaction amounts to ensure you're the owner of this SOME OTHER FI account.

First Deposit \*

Second Deposit \*

Once the test transfer amounts have been entered successfully, the external account will be displayed with an “Open” label under the “ACH Accounts” heading in the “Accounts” tab under “Settings.” The member will then be able to transfer funds from Connexus accounts to the linked external account using the “Transfers” widget in Online & Mobile Banking.



## Frequently Asked Questions

### What are the qualifications to use this feature?

*In order to use this feature, you must request access by calling us at 800-845-5025 or submit your request through Message Center within Online Banking.*

### How do I transfer funds from external accounts to pay my Connexus loan?

*Access our **Transferring Funds from External Accounts to Connexus Loans** user guide [here](#).*