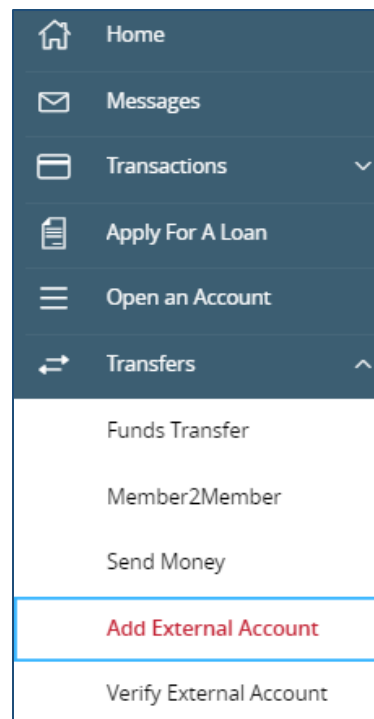


ADDING EXTERNAL ACCOUNTS & NICKNAMING

1. Once logged in, select “Transfers” from the navigation bar on the left, and then select “Add External Accounts.”



2. Complete Step #1, by filling out the form, including your account number, account type and routing number.

Step 1: Add Your Account

To begin, you will need to input the following information about the account you would like to add:

- Institution's Routing Number
- Your Account Number (Max length of 17 digits)
- Account Type (checking or savings)

Once this information has been entered, click on the Continue button.

Two "micro" deposits will be generated and sent to your external account (typically within 5 business days). Micro deposits are random deposits in amounts less than \$1. Once you have received these two micro deposits in your external account, make note of both amounts as you will need them later in step 2, the verification process.

- **Please Note:** Only domestic (U.S.) banks are allowed.
- If the micro deposits do not appear in your account within the specified timeframe, contact the other financial institution to verify that you are using the correct routing number as some institutions do not use a single number for all account types.

Account Number:

Account Type:

Checking



Routing Number:

- Once this information has been entered, click on the “Continue” button. Two micro deposits will be generated and sent to your external account (typically within 5 business days). Once you have received the amounts of your micro deposits, you’ll log back in and navigate to the same location, and click on the link that says “Please click here to enter the amounts and activate your external account.”

Step 2: Verify Your Account

Once you receive the amounts of your micro deposits, please click here to enter the amounts and activate your external account.

- You will enter the amounts at that time and complete the process.

Account Verification

Please choose an account to verify using the amounts that were deposited to your account.

Account	Account
Account Type: Checking	Account Type: Checking
Routing Number:	Routing Number:
Status: Funds have been sent to the target account	Status: Funds have been sent to the target account
☒	☐

VERIFY DEPOSIT AMOUNTS

The deposit amounts should be entered in cents (example: \$0.05 should be entered as "05").

Amount #1:

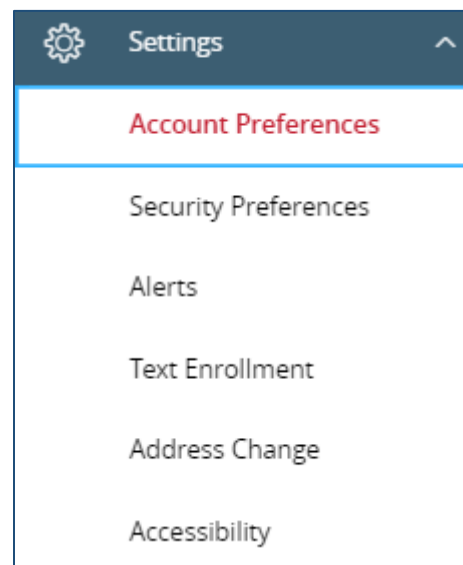
Amount #2:

[Click here to return to the main form.](#)

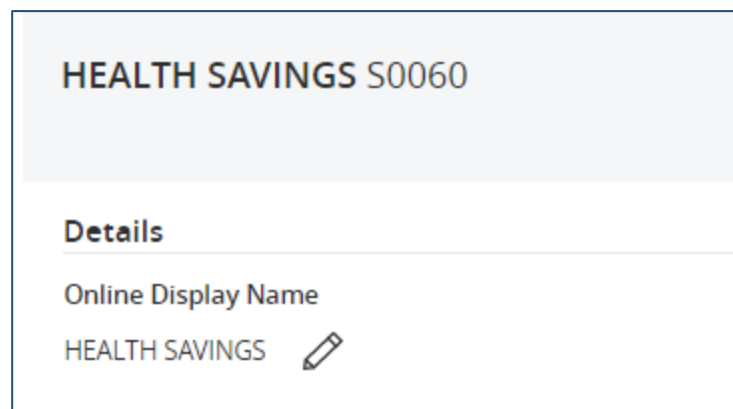
Continue

5. If you selected “Funds Transfer,” you will be directed to the Transfer screen. If you selected “Close,” you will be directed back to the home screen.

6. At that time you may choose to nickname your accounts, by selecting the “Settings,” and “Account Preferences” tabs in the navigation bar.



7. Click on the account in which you'd like to change the name (or nickname) differently. Details regarding that particular account will expand.



8. Select the pencil icon and type your selected nickname for that account, and click the check mark to the right to save your changes.

