

How to Find a Member's External Transfer Limit

1. Find the member in Q2.
2. Right click on their login and then click *Show User*.
3. Click *Show Customer* at the top and look at what is displayed by **Group**:



Customer Type: ☒ Household ☐ Business/Corporate

Group: Consumer Level 1 Users ▼

Consumer Level 1 = [REDACTED] (This is the default)

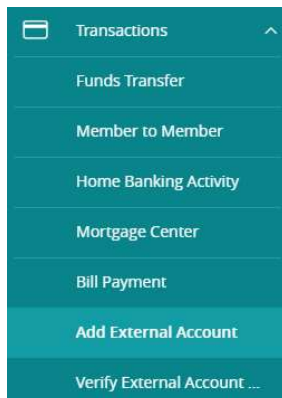
Consumer Level 2 = [REDACTED] (Must be approved by a team lead or manager)

Consumer Level 3 = [REDACTED] (Must be approved by [REDACTED])

YOU CAN CHANGE THESE LEVELS BUT DON'T CHANGE WITHOUT APPROVAL

Instructions to Set Up an External Account

1. First have the member log into their Home Banking and click on Menu > Transactions > Add External Account.



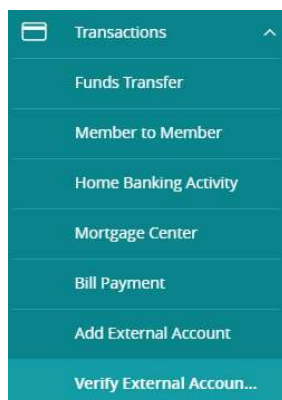
2. At the bottom of the page, the member will input the account number and routing number of their other institution. Click on the “Account Type” pull down box and choose whether it will be withdrawing money from a savings or checking account.

Account Number:

Account Type:

Routing Number:

3. At this point, their account needs to be verified – this means that there will be two microdeposits into their other institution’s account. **These microdeposits can take anywhere from 1-3 business days.**
4. When the member sees both microdeposits into the account they are trying to link, then they will log back into Home Banking and click on Menu > Transactions > Verify External Account.



- There they will input the two-dollar amounts (less than \$1) and then submit those.

ACCOUNT VERIFICATION

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

Account Number: [REDACTED]

Routing Number: [REDACTED]

Account Type: Checking

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:

Continue

- After they have been linked, they should be able to transfer money to and from the external account by going to Menu > Transactions > Funds Transfer and choosing the EXTERNAL account type.

Transactions

Funds Transfer

From Account

EXTERNAL [REDACTED] ▼

To Account

Checking [REDACTED] ▼

- The member can also set these up for automatic transfers by choosing the best option for them in the "Frequency" drop down box.

Please be aware that if the member doesn't verify their microdeposits within a week, the request will disappear and the member will need to start over again.