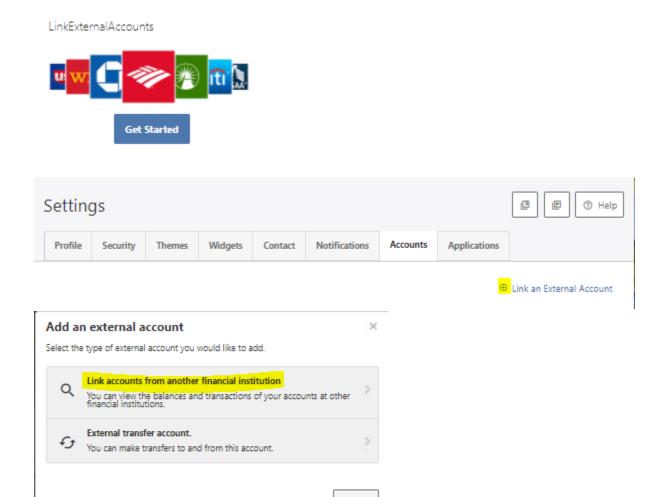


Linking External Accounts

Members can link external accounts they have at other financial institutions in order to view balances and transaction history. This also allows the members to view these accounts in the financial wellness tool for a more well-rounded view of their finances.

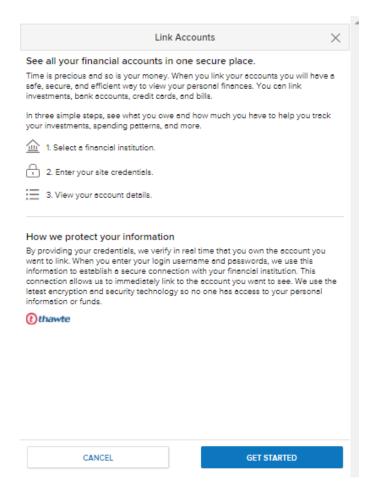
These accounts can be added directly from the Dashboard or from the account settings tab.



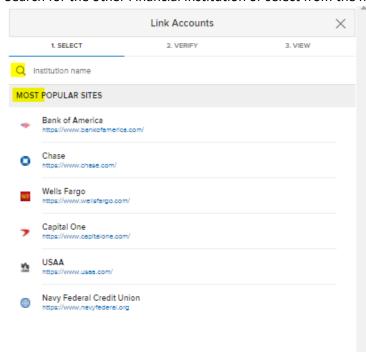
Click *Get Started* to begin entering the other financial institution's information and online banking credentials

Cancel



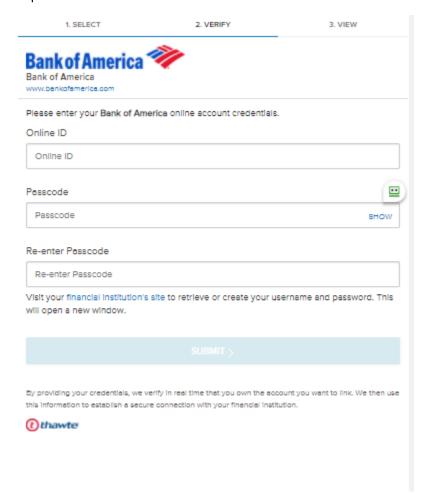


Search for the other Financial Institution or select from the most popular sites





Follow the prompts for the financial institution in order to link the account. Some institutions will require multi factor authentication to establish a connection.



Once completed the list of accounts associated with that log in will display balances and the transactions will be downloaded. This may take some time to complete and for the accounts to then be visible on the dashboard and accounts widgets.

"Linked accounts are for informational purposes and will not show in the accounts to transfer to/from in the transfers widget. See the External Transfer Account Set Up job aide for details on how to set those up.