

## Adding an External Account

1. Hover over the **Accounts** menu.
2. Click on **External Accounts**.

**CALTECH EMPLOYEES Federal Credit Union**  
Account Summary

Co-Browse User Options Contact Us ? Help Log Out

Accounts Online Services Apply for a Loan

Summary  
Transfer  
Export  
E-Statements  
Scheduled Transfers  
**External Accounts**  
Dashboard

Title	Suffix	Account Type	Account Balance	Available Balance
REGULAR SHARE ACCT	00	Regular Share		
Total Insured Accounts				

\* Your savings federally insured to at least \$250,000 and backed by the full faith and credit of the United States Government.

Credit Cards

Card	Type	Current Balance	Minimum Due	Credit Limit
Apply for a Caltech Visa® Credit Card today!				

3. Under the “Add a New Account” section, select **New Account** from the Account Type dropdown menu.  
The screen will expand.

**CALTECH EMPLOYEES Federal Credit Union**  
Account Summary

Co-Browse User Options Contact Us ? Help Log Out

Accounts Online Services Apply for a Loan

Member #: \*\*\*\*\*58  
Member ID:  
Address: :  
E-Mail Address:

Current External Accounts

Bank Name	Nickname	Account #	Type	Status	Options
There are currently no external accounts.					

Add a New Account

Account Type:  **VIEW SCHEDULED TRANSFER LIST**

Accounts | Loans | Online Services Home Page  
Copyright © 2013 Caltech Employees Federal Credit Union ( V7.17)

4. Enter the external account information into all fields that apply.
5. In the Ownership area, you need to specify if you are the Owner or Joint Owner for the financial institution you are adding.
6. Click the **Add Account** button.

\*Please note, when selecting an account Nickname we recommend you specify beyond simply “checking” or “savings” as you this may cause you confusion if you add additional accounts (example: BofA Cking).

**Add a New Account**

**Account Type:** New Account

**Check this box if this is a cross-account at the same institution.**  
For assistance with cross-accounts, call us at 818-952-444, option 3

**U.S. Check Sample**

⑆ 211554485 ⑆ 0012 1456874801 ⑆

Routing Number      Account Number

(9 digits)              (3-17 digits)

**Bank Name:**

**Routing Number:**

**Account Number:**

**Re-enter Account Number:**

**Account Type:** New Account

**Nickname:**

**Ownership:**  Owner  Joint Owner

Add Account

[VIEW SCHEDULED TRANSFER LIST](#)

Accounts | Log Out | Online Services | Home Page

You may link to an account at CEFCU or at another financial institution. Once the account is linked, it will appear as one of your choices in the Transfer screen. You will be able to transfer both into and out of your external institution account as well as the linked CEFCU account.

**Instructions**

**Step 1: Add an Account**

- Under Add a New Account select 'New Account' for Account Type.
- Complete all of the empty fields to the left and click 'Add Account' button.
- To link to another CEFCU member account, select 'Check this box if you are adding an account at CEFCU.' Then complete all empty fields to the left and click 'Add Account' button.

**Step 2: Verify Your Account**

- To verify the linked account, we'll make two small deposits to the new account. Verification deposits may take 1-2 business days.
- After that, come back to this page and click on 'Complete Verification' and enter the transaction amounts to complete the setup.

**Step 3: Make a Transfer**

- Once you've verified your account, you will then see the option to make a transfer. For future payments after the initial setup—you will skip steps 1 and 2.

Please Note: Transfers need to be created before 2:00 PM Pacific Time to be processed on the next business day.

**IMPORTANT:** By completing the information below, you authorize us to electronically debit/credit your account at another financial institution.

7. Read the instructions and verify the information on the next screen.
8. Click the **Confirm**.
9. Two small deposits will be made to your external account within one to two Business Days. You will need to access your other financial institution's account to find out what the two small deposits were.

10. Log back into you eBranch account.
11. Select **External Accounts** under the **Accounts** menu.

12. Click on Complete Verification.

**CALTECH EMPLOYEES**  
Federal Credit Union  
Account Summary

Co-Browse User Options Contact Us ? Help Log Out

Accounts Online Services Apply for a Loan

Font Size A A A

Member #:  
Member ID:  
Address: 4:  
E-Mail Address:

Current External Accounts

Bank Name	Nickname	Account #	Type	Status	Options
it Union	BP Checking		Checking	Unverified	<a href="#">Complete Verification</a> <a href="#">Delete</a>

Add a New Account

Account Type:

VIEW SCHEDULED TRANSFER LIST

Accounts | Loans | Online Services Home Page  
Copyright © 2013 Caltech Employees Federal Credit Union ( V7.17)

13. Enter in the amounts of the two deposits from into the external account.

14. Click **Verify Account**.

**CALTECH EMPLOYEES**  
Federal Credit Union  
Account Summary

Co-Browse User Options Contact Us ? Help Log Out

Accounts Online Services Apply for a Loan

Font Size A A A

Member #: \*\*\*\*\*56  
Member ID:  
Address: 44:  
E-Mail Address:

Verify External Account

Bank Name:  
Routing Number:  
Account Number:  
Bank Account Type:  
Nickname:

Transaction Amount 1: \$0.65

Transaction Amount 2: \$0.86

**Completing Verification:**

- Two (2) small transactions will be made to the external account when you 'Add a New Account' (new external account for transferring funds).
- Within 2-3 business days after submitting your request to add a New Account, the external account needs to be checked to identify these two small transactions.
- The transactions could have a general description or appear as if they are deposits from Caltech Employees Federal Credit Union.
- The amount of the transactions will need to be verified. Once you identify these transactions, you will return to the 'External Accounts' page and press 'Complete Verification'. If the amounts entered match the amounts of the transactions, then the account will be enabled for external funds transfers.

[Verify Account](#)

VIEW SCHEDULED TRANSFER LIST

Accounts | Loans | Online Services Home Page

The screen will update showing the external account status as "Verified".

You are now able to transfer funds between this CEFCU account and your external account.

**CALTECH EMPLOYEES Federal Credit Union**  
**Account Summary**

Co-Browse User Options Contact Us ? Help Log Out

Accounts Online Services Apply for a Loan

Member #: ·  
Member ID:  
Address: 44  
E-Mail Addr

Font Size A A

**Current External Accounts**

Bank Name	Nickname	Account #	Type	Status	Options
<a href="#">v Credit Union</a>	BP Checking	XXXXXX	Checking	Verified	Delete

**Add a New Account**

Account Type:

[VIEW SCHEDULED TRANSFER LIST](#)

[Accounts](#) | [Loans](#) | [Online Services Home Page](#)  
Copyright © 2013 Caltech Employees Federal Credit Union ( V7.17)