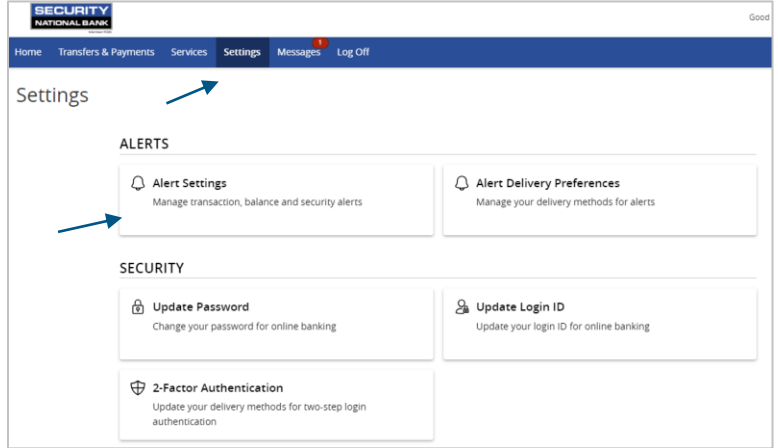
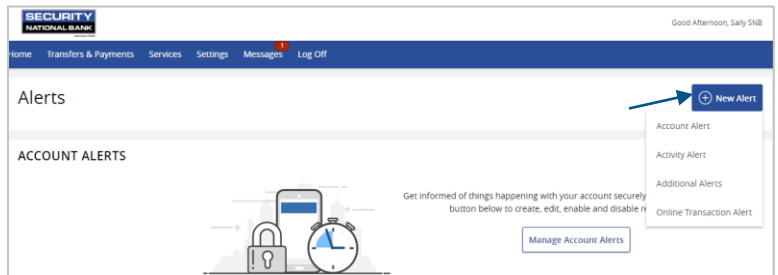




1. Select the 'Settings' menu and then select 'Alerts Settings'.



2. Click the 'New Alert' button and select the desired type of alert from the drop-down menu.



Questions? Please call our Customer Care Center toll-free at 855-614-4061.



## Account Alerts

1. Select an 'Account'.
2. Select an 'Alert balance type'.
3. Select an 'Alert Frequency'.
4. Select the 'Start date'.
5. Select the desired 'Alert Delivery Method'.
6. Enter the necessary information.
7. Click the 'Create Alert' button.

The screenshot shows the 'New Account Alert' form. At the top, there is a navigation bar with 'Home', 'Transfers & Payments', 'Services', 'Settings', 'Messages' (with a notification icon), and 'Log Off'. Below the navigation bar is a 'Back to Alerts' link. The form title is 'New Account Alert'. It contains several dropdown menus: 'Account' (set to 'HSA Checking 0001 \$55.07'), 'Account balance type' (set to 'Available Balance'), and 'Frequency' (set to 'Every day'). There is a 'Start Date' field with a calendar icon, set to '09/11/2024'. Below this is a blue information box with a question mark icon and the text: 'This alert will send your selected balance daily starting September 11th. This alert will repeat until disabled or deleted.' Underneath is the 'Alert Delivery Method' section with four buttons: 'Email', 'Voice', 'SMS Text Message', and 'Secure Message Only'. At the bottom are two buttons: 'Go back' and 'Create Alert'.

## Activity Alerts

1. Select a 'Transaction Type'.
2. Select the amount comparison and dollar amount.
3. Select the 'Account'.
4. Select the desired 'Alert Delivery Method'.
5. Enter the necessary information.
6. Click 'Create Alert'.

The screenshot shows the 'New Activity Alert' form. It has the same navigation bar as the previous form. Below the navigation bar is a 'Back to Alerts' link. The form title is 'New Activity Alert'. It contains several sections: 'Transaction Type' with four buttons: 'Debit Transaction', 'Credit Transaction', 'Check Number', and 'Description'; 'Amount' with three buttons: 'More than', 'Less than', and 'Exactly', followed by a text input field with a dollar sign and '0.00'; 'Account' with a dropdown menu; and 'Alert Delivery Method' with four buttons: 'Email', 'Voice', 'SMS Text Message', and 'Secure Message Only'. At the bottom are two buttons: 'Go back' and 'Create Alert'.


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## Online Transaction Alerts

1. Select a 'Transaction' type.
2. Select the 'Account'.
3. Select the 'Status' of the transaction.
4. Select the desired 'Alert Delivery Method'.
5. Enter the necessary information.
6. Click 'Create Alert'.

## Security Alerts

**NOTE:** Security alerts are listed at the bottom of the screen. Select the carrot  icon to expand the listing of available alerts. Some alerts are clickable and may be turned on or off. The most critical alerts are mandatory and cannot be turned off. These alerts are greyed out.

1. Select edit delivery preferences to modify how and where to receive security alerts.

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