



A Division of Broadview

SWITCH ASSIST USER GUIDE

< ClickSWITCH >



800-727-3328 | sefcu.com

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SWITCH ASSIST

Making switching easier than ever before!

SWITCH ASSIST HELP GUIDE

< ClickSWITCH >

ClickSWITCH offers a feature called Switch Assist which allows you to access your previous financial institution's online banking portal where you can view and switch your recurring direct deposits and automatic payments tied to that account to your SEFCU account – making switching easier than ever before!

Accessing Switch Assist

1. Access ClickSWITCH for the first time using your Welcome Email, the unique SwitchTRACK Code given to you, or that you were given during enrollment. Returning users can access ClickSWITCH via online banking and use your new ClickSWITCH login and password.

2. To begin a switch, you should click **USE SWITCH ASSIST**.

Note: You can also choose to utilize the manual process.

Let's start switching!

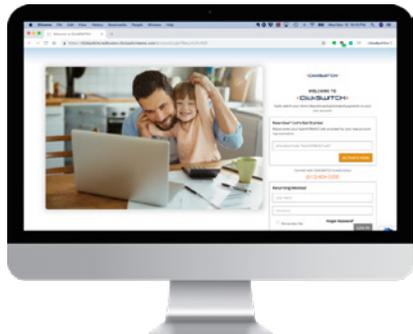
Choose an option below to start your direct deposit switch:

[USE SWITCH ASSIST](#)

to sign into your previous financial institution to view your accounts and help you identify direct deposit transactions

or

[MANUALLY ENTER DIRECT DEPOSIT DETAILS](#)

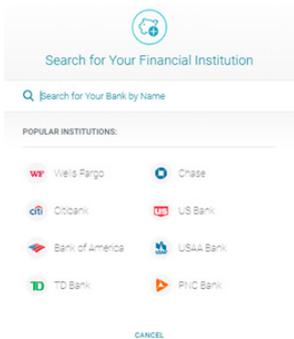


SETTING UP SWITCHES

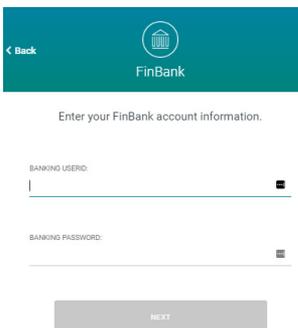
This is a simple three-step process.

1. Deposit/Payment Selection

a. Search for your previous bank or credit union by name.



b. Once your previous financial institution is selected, you will be prompted to enter the login credentials for that institution's online banking platform.



c. Select the deposits and payments

Review Direct Deposit Transactions 

We've filtered your transactions and put those that appear to be eligible for switching at the top so you can easily make the switch, just select and continue to finish.

Date	Who paid you	Amount
Jan. 08, 2020	MINE STATION	\$1,232.49
Jan. 08, 2020	GGC ENGINEERING	\$2,125.45
Jan. 08, 2020	GGC ENGINEERING	\$2,125.45
Jan. 08, 2020	MINE STATION	\$1,237.65
Jan. 08, 2020	GGC ENGINEERING	\$2,125.45
Jan. 08, 2020	MINE STATION	\$1,232.49

Navigation: < 1 >

d. Select the accounts you want to look for deposits and payments to switch (Best practice: only savings and checking accounts should be selected)


Your Accounts

Please select all the accounts you want to include.

<input type="checkbox"/>	Roth IRA	\$702.10
<input type="checkbox"/>	Line of Credit	-\$702.10
<input checked="" type="checkbox"/>	Checking	\$702.10
<input checked="" type="checkbox"/>	Savings	\$702.10

e. Answer the questions generated for each depositor/payee

STEP 1: Deposit Selection STEP 2: **Your Information** STEP 3: Review & Submit

1 — 2 — 3

Where would you like your deposit to go?
Select from the options below to continue making the switch.

SELECT ACCOUNT
Checking - 00044888 (Checking)

CONTINUE

PREVIOUS SAVE & CONTINUE LATER

2. Your Information

a. Select the SEFCU accounts you want these deposits/payments to be switched to

**Great! Lets get some info about your switch for
The Fusion Network**

You might want to have an old paystub handy to help you answer.

SSN - Last 4*

Employee ID Number

*Indicates required field.

CONTINUE

PREVIOUS SAVE & CONTINUE LATER

3. Review & Submit

- a. Review the information you entered to ensure it is correct
- b. If any edits are needed, click the pencil icon next to the section needing to be updated
- c. Once all information has been reviewed, click “Submit”



So, just to confirm.

So, who pays you? [Edit Switch](#)

DEPOSITOR	University of Minnesota
SSN	1234
EMPLOYEE ID NUMBER	4567

Deposit information [Edit Deposit Information](#)

DEPOSIT TO:	Checking - x5333 (Checking)
DEPOSIT DESCRIPTION:	Remainder

SUBMIT

PREVIOUS SAVE & CONTINUE LATER

- d. When the switch has been submitted, ClickSWITCH will present a confirmation message, You can click on one of the options on the confirmation screen to continue doing switches or choose to come back later to submit additional switches.



Your direct deposit is on its way!

The last thing to do is to switch over your recurring payments. It's a cinch.

ADD ANOTHER DIRECT DEPOSIT **CONTINUE TO SWITCH PAYMENTS**

[I'LL SWITCH MY PAYMENTS LATER](#)

FREQUENTLY ASKED QUESTIONS

Question: How does ClickSWITCH work?

Answer: ClickSWITCH takes the hassle out of moving automated payments and direct deposits to your SEFCU account. You input your payment and Direct Deposit information into our secure ClickSWITCH system and we'll get to work contacting all the billers to switch your payments over to your SEFCU account. You can monitor progress and track status in the "Status" column.

Question: What types of payments or deposits can be moved to my new account using ClickSWITCH?

Answer: Direct deposits and automatic ACH payments.

- A Direct Deposit is any payment that you receive from a person or organization directly into your account. These include payroll Direct Deposits, government Direct Deposits (Social Security, Disability, etc.) and dividend Direct Deposits from investment accounts.
 - An automatic ACH payment is a regular, ongoing payment that is initiated externally to your bank account, such as a monthly insurance bill, utility payment or automobile loan payment. **Please note:** Automatic payments that are set up using a bill pay service cannot be switched.
-

Question: Where do I get my ClickSWITCH code?

Answer: SEFCU will provide you with a SwitchTRACK code when you open a new account. If you have misplaced your code, a new code will need to be generated. Please contact SEFCU's Member Solutions Center at 800-727-3328 or visit a SEFCU branch.

Question: What do I need to get started?

Answer: When logging into ClickSWITCH you'll have the option to use Switch Assist or Switch Myself. With Switch Assist you can log into your account at your previous institution and the system will show you all of your automatic payments, Direct Deposits and bill pay items. You can make these switches directly from the system. You also have the option of using Switch Myself. If you'd prefer to use this method, simply gather your paper bills or online statements that include the biller's name, addresses, account numbers, and due dates.

Question: How long should it take for my switch to be complete?

Answer: It can take anywhere from two weeks to 30 days for your online payments, direct deposits, etc. to get switched depending upon the financial institution, merchant, or organization involved. It's always a good idea to review your switch status page for the most current information regarding each switch.

Question: Do I need to reach out to my billers/employer?

Answer: We display the status for each automated payment or Direct Deposit in the "Status" column. If a switch shows as "Completed" there's no need to contact the biller. For switches that are marked as "Mailed" for more than 10 days, you may want to contact the biller to confirm the status.

Question: I am having technical difficulties, who should I contact?

Answer: Please contact SEFCU's Member Solutions Center at 800-727-3328 or visit a SEFCU branch.

SWITCH ASSIST

<ClickSWITCH>

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