

# UPGRADE CHECKLIST

Get Prepared with this System Upgrade Checklist

## Before the Upgrade, Complete prior to July 31<sup>st</sup>

- ☐ **Log in to internet banking and verify your contact information**  
Double check your email, phone number, and mailing address so you don't miss any important updates. Write down your 6-digit account / member number (located on membership card, or on a previous statement). You'll need this to re-login to the new internet banking system after August 1<sup>st</sup>.
- ☐ **Download and save your statements or check images (if needed)**  
Past eStatements will not transfer over, so download any documents you want to keep for your records prior to July 25<sup>th</sup> (June 2025 will be the last statement available)
- ☐ **Make any necessary transfers ahead of time**  
Complete important transfers or payments before July 30<sup>th</sup> at 3:00pm as some services will be temporarily unavailable during upgrade weekend.
- ☐ **Bill Pay - *Service Continuing!***  
**Bill Pay will be available** after the upgrade! Your current payee details will not transfer, so please save or screenshot that information before July 25. You'll need to manually re-enter your Payees once the new service becomes available.
- ☐ **Document P2P and Bank-to-Bank transfer details**  
If you currently use our Pay Anyone (P2P) or Bank-to-Bank transfer service, be sure to document any recipients and transaction details.  
P2P (Pay Anyone) will no longer be available after July 25, 2025.  
*We recommend downloading an alternative app such as Venmo, PayPal, Apple Pay, Google Pay, or Cash App to continue sending money securely.*
- ☐ **Note downtime for Internet & Mobile Banking**  
Internet & mobile banking will be unavailable Friday, August 1 thru Sunday, August 3rd. Plan ahead to avoid disruptions.
- ☐ **Know your debit card limitations during the upgrade weekend (Aug 1-3)**  
\$300 per day for ATM withdrawals + \$300 per day for purchases (total of \$600/day if funds are available)
- ☐ **Withdraw cash if needed & know your account balances before the upgrade**  
We recommend getting any cash you may need for August 1-3, by Thursday, July 31. Debit cards will have temporary limitations over the weekend. Keep track of your spending as you won't be able to check your account balances August 1-3.
- ☐ **Apply for a backup credit card (optional)**  
Consider applying for an Accentra Visa Credit Card before July 1, 2025, as a convenient backup option during the upgrade.



## Stay Connected

Watch for updates via email, mail, website, and social media. We'll keep you informed every step of the way!

Reach out if you have questions!

Call us, email, or stop by—we're here to help make the transition as smooth as possible.



[accentracu.org/upgrade](https://accentracu.org/upgrade)

800-533-0448

[ask@accentracu.org](mailto:ask@accentracu.org)

Stop in!



Know what to expect during the upgrade weekend—**check out our Upgrade Timeline!**

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## After the Upgrade

*on or after Monday, August 4th*

### **Please be patient during and after the upgrade:**

*As we transition to our new system, there may be a few bumps along the way. Our team is here to support you, but we do expect higher-than-normal call volumes in the days following the upgrade. If you need help, we encourage you to stop by a branch—we'll be happy to assist you in person.*

- ☐ **Log in to the new Internet Banking system**  
You'll login by hitting 'Forgot Password' on the login screen. Your username will be your 6-digit member number. You will be emailed a temporary password. Please do not use the number from your checks or your debit/credit card—those are different. Check your membership card or a previous statement for your 6-digit account/member number.
- ☐ **Download our new mobile app**  
Delete the Accentra app currently on your phone (if still installed) and search for the new Accentra CU app in your app store
- ☐ **Set up your Bill Pay in the new system**  
If you were previously using Bill Pay, now's the time to log in and re-enter your saved payee information. Your payees and scheduled payments did not transfer over, so you'll need to manually set them up again.
- ☐ **Re-establish Automatic Transfers**  
Any scheduled or recurring transfers will need to be set up again in the new system.
- ☐ **Set up account alerts**  
Review or recreate balance, transaction, and security alerts in the new system.
- ☐ **Check your account history**  
Recent transaction history may look different—review to ensure everything is accurate.
- ☐ **Update saved bookmarks or app shortcuts**  
Make sure you're using the correct login links for online and mobile banking.
- ☐ **Explore new features**  
Check out the upgraded tools in online banking, such as card controls, new dashboards and mobile deposit. Watch our "Get to Know..." videos on our website
- ☐ **Confirm direct deposits have posted correctly**  
Especially important for those who updated their savings suffix—check that your deposit landed in the correct account.



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*Thank you for your patience as we work through this big transition together!*