

It's your money.

Switch in a snap.

<ClickSWITCH>



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The fast, secure, and free way to switch your automatic payments and direct deposits to another account.

ClickSWITCH™ is a new service that allows you to switch your automatic payments in 10 minutes or less. It's quick, easy, and convenient—available through the credit union mobile banking app, mobile web, and online banking.

How it works

- A switch can be initiated in branch, over the phone with a credit union representative, or in the comfort of your home through online banking.
- Simply log into online banking and click the ClickSWITCH™ Portal.
- This is where you can switch automatic transactions from accounts at other financial institutions to your new or existing credit union account.
- Easy as that!

Benefits for you

- Switches can be completed within 10 minutes or less.
- Typically, complete switches in 5 to 15 days, depending on merchant.
- Receive real time switch confirmation.
- Initiate account closure when the switch is complete.

ClickSWITCH™ Overview

https://www.youtube.com/watch?v=WMaSWdprO_4

Safe and Secure

ClickSWITCH™ uses the latest in online encryption protection to gather and store your switch information. Additionally, the mailing facilities adhere to the highest industry standards regarding security of your personal information.

Talk to us today about ClickSWITCH™

Frequently asked questions

How do I access ClickSWITCH™?

We can assist you here in branch, or if you prefer, ClickSWITCH™ can be accessed through online banking. Once logged in, simply select Payments from the left-hand navigation menu to access ClickSWITCH™.

What do I do if I can't find a certain biller or depositor in ClickSWITCH™?

If you cannot find the company you are looking for, there is an option to create that company from scratch. Simply click the Create New Depositor/Biller button to enter all the company details. ClickSWITCH™ will do the necessary research to find that company's correct information and get the switch sent off to them.

How long will it take for me to switch my payments?

Timing for each payment switch can vary depending on the type of payment, biller and method needed to switch the payment. Online banking bill payments are switched instantly. Automated payments and direct deposits typically take between 5-15 days to switch but can take longer depending on the merchant. It's always a good idea to review your switch status page for the most current information regarding each switch.

What should I do if a switch still shows as mailed?

Automated payments may take up to 10 days to switch. If your switch has a "Mailed" status for more than 10 days, it's a good idea to contact the biller to confirm the switch or to see if the biller needs additional information.

One of my switches has an "action needed" status. What does this mean?

Occasionally, after you have submitted a switch for processing, our research team determines that a biller requires you to update your banking information with them online. When this happens, your switch will show an "Action Needed" status. To see the details of the action you need to take, you can click on the Edit icon in the Actions column.

Is there a fee for using the service?

No, ClickSWITCH™ is a complimentary service offered within our free online banking.

Why do I need to enter my billing account number?

Your billing account number is required by the biller to ensure your identity and to update the account information in their system.

How do I know my payment has been switched?

The easiest way to check the status of a switch is to look at the "Status" column of your ClickSWITCH™ account. Switches that have been completed and confirmed by your biller will display a "Completed" status. Switches that are still in process will display a "Mailed" status.

What if I want to submit additional switches later?

You can easily add additional switches any time! Simply log back into yourClickSWITCH™ account and resume your session.

What if my switch isn't completed and I miss a payment?

Monitoring your switch status is an important part of moving your account. It is advisable to keep enough money in your old account to cover each payment until the switch status for that payment has changed to "Completed", or you've confirmed with your billers that your payment account information is updated in their systems.

Is ClickSWITCH™ secure?

Yes! Switch Concierge uses the latest in online encryption to gather and store your switch information. Additionally, our mailing facilities adhere to the highest industry standards regarding security of your personal information.

How do I get help setting up my switches?

Please contact your representative from your credit union for assistance.

When is it safe to move/remove funds from my prior account?

We recommend keeping enough money in your old account to cover each payment until the switch status is "Completed". This is especially important for any payments that might be due during the 14 days after you initiate a switch.