Quicken for Mac 2015-2017 Conversion Instructions

Express Web Connect

Introduction

As HealthCare Associates Credit Union completes its digital banking upgrade from Internet Branch to My247, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your Username and Password for HealthCare Associates Credit Union's My247 Digital Banking.

> **NOTE:** **Quicken Express Web Connect** uses the same Username and Password as your My247.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for *Backing Up*, select **Backing up data files**, and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Updates*, select "Check for Updates," and follow the instructions.

Task 2: Disconnect Accounts at HealthCare Associates Credit Union on or after January 9, 2018.

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select **Troubleshooting** > **Deactivate Downloads.**

4. Repeat steps for each account to be disconnected*.*

Task 3: Reconnect Accounts to HealthCare Associates Credit Union on or after January 17, 2018.

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select **Set up transaction download.**

4. Enter HealthCare Associates Credit Union in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Enter your **Username** and **Password** and click **Continue**.

6. If extra information is required, please enter it to continue.

> **NOTE:** Select "Express Web Connect" or "Quicken Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select "**Link"** to pick your existing account.

> **IMPORTANT:** Do **NOT** select "**ADD**" under the action column.

8. Select **Finish**.