

This checklist is designed to help users:

- **Confirm existing configurations**
- **Reestablish scheduled transfers & accounts**
- **Ensure proper access to services previously used in Cherokee Online**

Please review the sections relevant to the services you're enrolled in to verify that everything is set up correctly. If you notice any missing services or encounter issues, contact the **Convenience Banking Center**:

- **Email:** mybank@bankcherokee.com
- **Phone:** 651-225-6299

We're here to help ensure a smooth transition and continued access to your essential banking tools.

Validate Existing Information

Settings

- ☐ Go to **Profile Picture** (top corner of screen) > **Settings**
 - ☐ Review **Security** Options
 - **Security Information** allows you to change your username and password.
 - **Two-Factor Authentication** allows you to select how you would like to receive One Time Passwords.
 - **Remembered Devices** allows you to manage the devices used to access your accounts. You can also delete old devices you no longer use.
 - ☐ Review **Contact** Options
 - **Addresses**
 - **Phone Numbers**
 - **Email Addresses**
 - ☐ Review **Accounts** Option
 - Here is where you can create a nickname for your account and order them the way you want to see them.

Bill Pay

- ☐ Go to **Transfer & Pay > Bill Pay**
 - ☐ Review scheduled payments, activity, and history.

eDocuments

- ☐ Go to **Accounts > eDocuments**
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Reestablish Key Functions

Scheduled Internal Transfers

- ☐ Go to **Transfer & Pay > Transfers > Make a Transfer**
 - Set frequency under the 'Frequency' section.

Scheduled Internal Loan Payments

- ☐ Go to **Transfer & Pay > Loan Payments Scheduled**
 - Review and manage scheduled loan payments.

External Transfers

- ☐ Go to **Link External Accounts > Get Started** on desktop. On a mobile device go to **More (...)** > **Transfer & Pay > Transfers > Add Account**.
 - You can connect to accounts you are an owner of at other banks.
 - Once connected, you can transfer between your accounts at BankCherokee and your other bank.

Alerts

- ☐ Go to **Tools > Alerts**
 - Customize alert preferences.
- ☐ Pro Tip to set up Text Alerts: Click **profile icon > Settings > Contact > Mobile > Enable text alerts**.

Quicken & QuickBooks

- ☐ Download the guides from our website at <https://bankcherokee.com/digital-banking-upgrade-for-you-2/>
 - Please note, it can take up to 5 days for Intuit to update Web Connect to point to our new platform.