



Migration Checklist

Pre-Migration

- ☐ **Visit** the [AccessJFG Friends and Family Website](#) for important information
- ☐ **Review** the Learning Journey guides and videos
- ☐ **User Information:** Ensure all user data is up to date by Oct 2nd.
 - Any changes after Oct 2nd will not transfer to the new system
- ☐ **Wire Templates:** Save/note beneficiary Address Information
 - Wire Templates **will** migrate to AccessJFG, but some recipient address information may need adjusting
- ☐ **Alerts:** Have users take note of their current transaction alerts
 - Some alerts may not transition and will need to be recreated (*See Alerts Guide in Learning Journey*)
- ☐ **Processing Deadline:** Ensure all payment files are uploaded and approved by 4pm on Friday, Oct 9th
- ☐ **Share the new AccessJFG User Credentials** with ALL company users
 - New Login Credentials:
 - Combine current Company ID (exclude 288) with your current User ID
 - Example: Current Customer ID: **288JFG**; User ID: **jdoe**
 - New User ID: **JFGjdoe** (*User ID is not case-sensitive*)

Go Live - Tuesday, October 13th!

- ☐ The new AccessJFG URL will be provided via email to all users on October 13.
 - *Must access through Chrome, Firefox or Microsoft Edge; does **not** work in IE*

Post Migration

- ☐ Verify Wire Template address fields migrated successfully
- ☐ Verify any Alerts that may need to be re-established
- ☐ AccessJFG Mobile App download instructions coming soon
- ☐ Share your Feedback with JFG early and often
- ☐ Watch your email for a survey to provide input on your experience



Client Learning Journey

This Client Learning Journey provides a detailed insight into the new client experience for AccessJFG. To ensure a smooth migration, please review these guides and videos under “Reference Material” on the dedicated [Friends and Family](#) website before Oct 13th.

Required for All Users

- ☐ First Time Login for Converting Users
- ☐ AccessJFG Overview video
- ☐ Navigating the Home Page, within Accounts, and Sending Secure Messages

Additional Items Required for ACH and/or Wire Users

- ☐ ACH Transactions
- ☐ ACH Pass-Thru
- ☐ Wire Payments
- ☐ ACH or Wire Payments Using Templates
- ☐ Approving ACH & Wire Transactions
- ☐ Managing ACH & Wire Recipients

Reference Guides for All Users

- ☐ Information Reporting
- ☐ Transferring Funds
- ☐ Alerts
- ☐ Statements
- ☐ Updating Password & Secure Access Phone Numbers
- ☐ General Guides
 - Check Reorder, Stop Payments, Account Labels, etc.