

# Troubleshooting Accounts

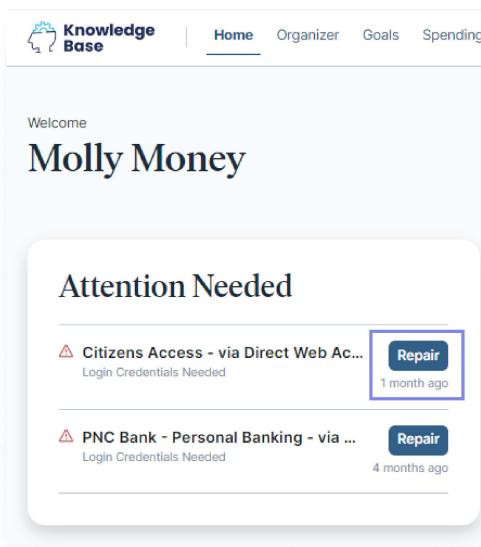
Personal Financial Website

This User Guide details how to repair any of your connected accounts with errors.

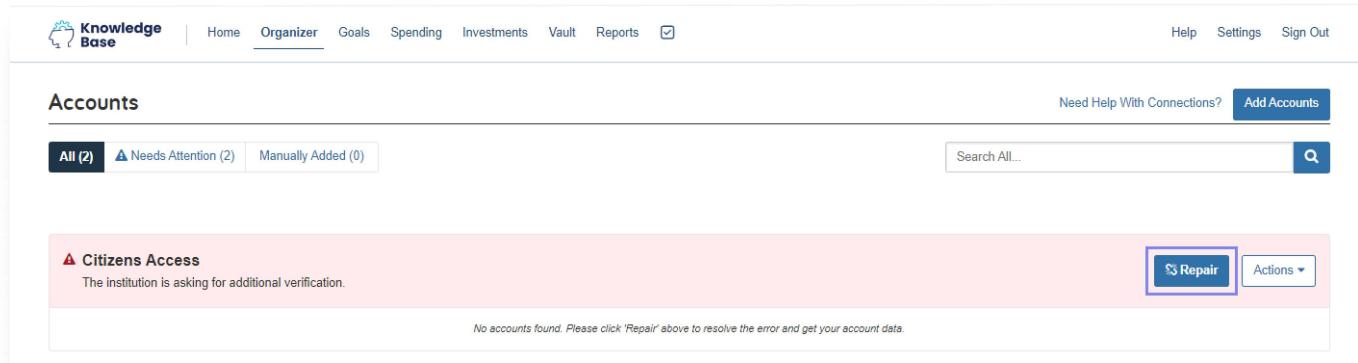
Unless noted by the institution, values should update nightly, but errors can occur from time to time for different reasons. To keep your website up to date, we recommend logging in regularly to maintain all connections.

## Troubleshooting and Help - Repair

When a connection is in an error state, an **Attention Needed** card will appear on your Home page. Click **Repair** to view instructions on how to resolve the error.

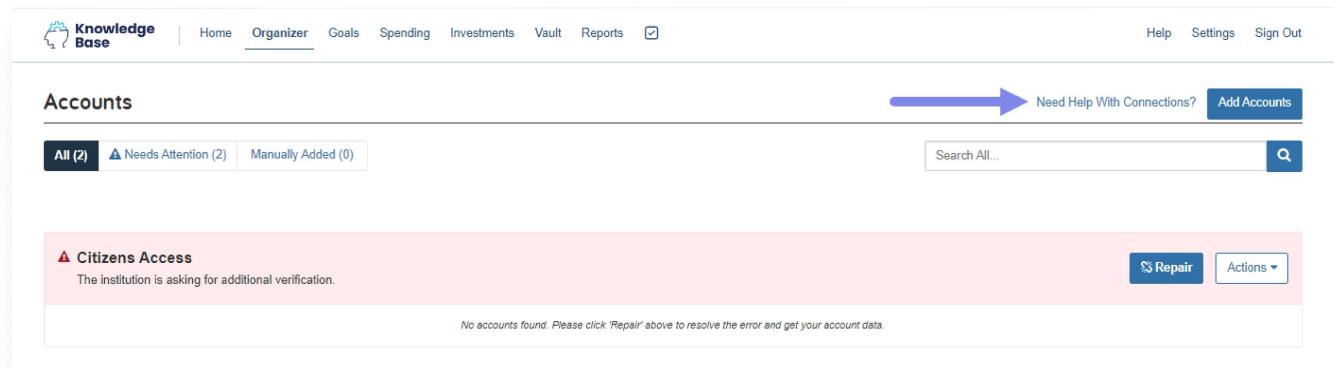


You can also troubleshoot a connection error from your Accounts page by clicking the **Repair** button in the red banner within your connection. Different errors will provide different steps to resolve the issue.



## Need Help With Connections?

Clicking the **Need Help With Connections?** button at the top of the Accounts page will open the Connecting Accounts Help Interactive User Guide. The lessons in that guide cover connecting and managing your accounts, FAQ, and troubleshooting the different error types.

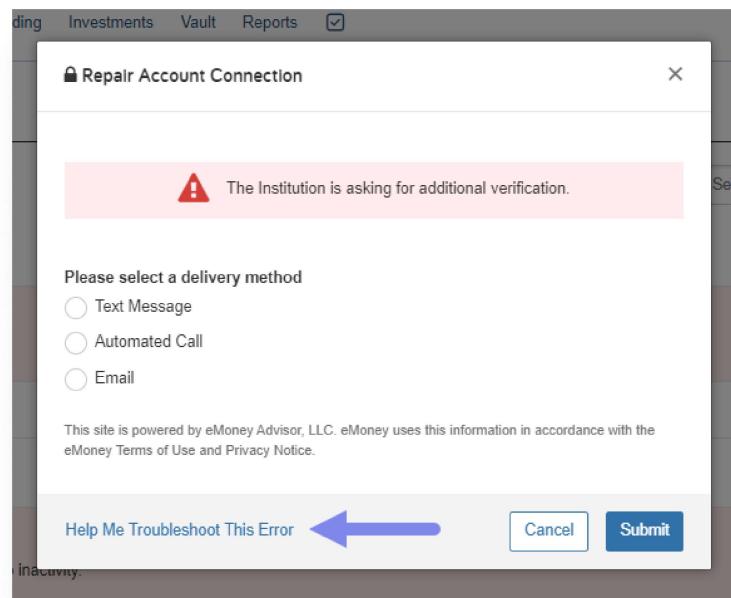


The screenshot shows the 'Accounts' page of a personal financial website. At the top, there is a navigation bar with links for Home, Organizer (which is underlined), Goals, Spending, Investments, Vault, Reports, and a dropdown menu. On the far right of the top bar are links for Help, Settings, and Sign Out. Below the navigation bar, the page title 'Accounts' is displayed. To the right of the title is a blue arrow pointing right with the text 'Need Help With Connections?'. Below the title, there are three buttons: 'All (2)', 'Needs Attention (2)', and 'Manually Added (0)'. To the right of these buttons is a search bar with the placeholder 'Search All...' and a magnifying glass icon. Further down, there is a pink callout box with the heading 'Citizens Access' and the subtext 'The institution is asking for additional verification.' Below this, a message states 'No accounts found. Please click 'Repair' above to resolve the error and get your account data.' At the bottom right of the callout box are 'Repair' and 'Actions' buttons. The overall background of the page is white.

## Help Me Troubleshoot This Error

When you click the **Repair** button on a connection, a pop-up window appears with steps to resolve the issue.

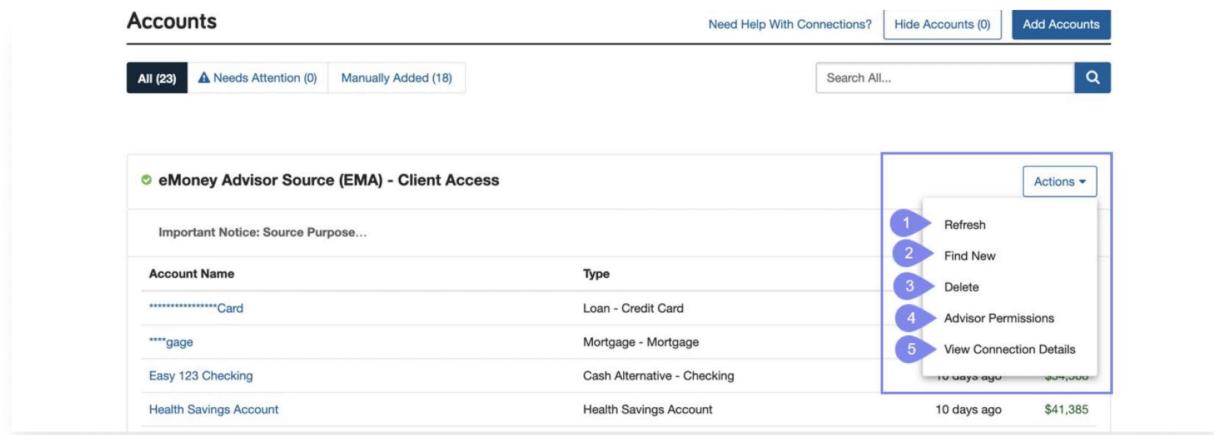
Click **Help Me Troubleshoot This Error** at the bottom of the window to launch the Connecting Accounts Help guide and see the section specific to the error you are experiencing.



The screenshot shows a 'Repair Account Connection' pop-up window. At the top, it says 'Repair Account Connection' with a close button. Below that is a pink warning box with a red exclamation mark and the text 'The Institution is asking for additional verification.' The main content area has a heading 'Please select a delivery method' with three radio buttons: 'Text Message', 'Automated Call', and 'Email'. Below this is a small note: 'This site is powered by eMoney Advisor, LLC. eMoney uses this information in accordance with the eMoney Terms of Use and Privacy Notice.' At the bottom of the window are 'Cancel' and 'Submit' buttons. To the left of the 'Submit' button is a blue arrow pointing left with the text 'Help Me Troubleshoot This Error'. The background of the window is white, and the overall background of the page is white.

## Using the Actions Dropdown

The **Actions** dropdown is available on every connection and helps you to manage the connection and resolve errors.



The screenshot shows the 'Accounts' page with a list of connections. The connection 'eMoney Advisor Source (EMA) - Client Access' is selected. To the right of the connection details, a 'Actions' dropdown menu is open, displaying five options: 1. Refresh, 2. Find New, 3. Delete, 4. Advisor Permissions, and 5. View Connection Details. The 'View Connection Details' option is highlighted with a blue box and numbered 5. The connection details shown include: Name: eMoney Advisor Source (EMA) - Client Access, Type: Client Access, Status: Needs Attention (0), and Last Sync: 10 days ago.

### 1) Refresh: Get the most recent account values

Use this action when the account values show as out of date. This will attempt to Refresh the connection and find the most recent account values at the institution.

### 2) Find New: Search the institution for new or additional accounts

**Find New** is only visible to you unless the Advisor Permission is set to Yes (see #4). Selecting **Find New** will search the institution for any accounts that have not yet been linked through the connection.

### 3) Delete: Permanently remove this connection

Clicking this will prompt you to **Delete** this connection and all its accounts. *Deleting a connection will delete all account history and spending transactions.* Only delete the connection if it is no longer needed.

### 4) Advisor Permissions: Allow your Advisor to Find New accounts for you

As a default, Advisors are not able to Find New accounts on your behalf because the Find New button is hidden from their view. Use Advisor Permissions to allow your Advisor to Find New accounts for this connection, on your behalf.

### 5) View Connection Details: View the Name, URL, and Type of Connection

Clicking this option will display a pop-up with additional details about the connection.