

## Understanding Migration Blackout Windows

### Internal Transfers, ACH and Wire Payments

**Migration will start at 5pm ET on Tuesday, November 5<sup>th</sup>.** Any scheduled transfers or payments set to process between 11/6 and 11/12 will process as normal through the current Online Banking platform.

Any actions taken in Online Banking after this time will **not** migrate to the new platform. This includes the scheduling of any internal transfers, ACH or Wire payments to be processed after 11/12.

You will be able to modify this information again starting on 11/13 in the new platform.

### User Data, Entitlements and Payment Templates

**Migration will start at 5pm ET on Tuesday, November 5<sup>th</sup>.** Any actions taken in Online Banking after this time will **not** migrate to the new platform. This includes updating of user contact information or Access Ids, changing user entitlement levels and modifications to payment templates.

You will be able to modify this information again starting on 11/13 in the new platform (i.e., if you remove a user/decrease their access on 11/6, you will need to log in on 11/13 and repeat that change in the new platform).

### Business Bill Pay

**Migration will start at 6pm ET on Friday, November 8<sup>th</sup>.** At this time the Bill Pay service will become unavailable until Wednesday, November 13<sup>th</sup> at 8am. All scheduled payments to be delivered between 11/12 and 11/15 will process as expected, however you may **not** be able to modify them.

We recommend that you alter the delivery date to before 11/8 or after 11/18 to avoid any issues with cancelling a payment.

## Information Migration

This document covers how each type of data will migrate from our current Online Banking platform to the new Digital Banking platform in November, 2019.

<b>Type of Information</b> <i>Lists the specific information that appears in the current and future platform.</i>	<b>Migration Information</b> <i>An explanation of how the information in the Type of Information column will be migrated and appear in the new Digital Banking platform.</i>	<b>Action</b>
Users User Roles	<p>All users will be migrated, including those that are disabled. We recommend that you remove any users that shouldn't be migrated prior to conversion.</p> <p>In the <b>Corporate Edition</b>, user entitlements will be migrated into the new User Role structure. Because our current Online Banking system sets entitlements at the user-level and the new Digital Banking platform sets them at the role-level, each migrated user will also have a role created to which they are the only user assigned. The name of the role will be the same as the user's name.</p> <p>We highly recommend that your administrator plan to consolidate the migrated roles into a handful of manageable roles based on common sets of users and their needs, then move your users into the new roles and delete the migrated roles to avoid confusion.</p> <p>For more information about managing user roles, <a href="#">view this help article and video</a>.</p> <p>For the <b>Business Edition</b>, entitlements are set at the user-level and will migrate 1:1 with your existing users.</p> <p>Note: All clients will migrate into <b>Business Edition</b> unless they use at least one of the following features within the current Online Banking platform that qualifies for Corporate Edition:</p> <ul style="list-style-type: none"> <li>- ACH Debits or Credits</li> <li>- Online Initiated Wires</li> </ul>	Optional Action

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<p>Payment Entitlements [Corporate Only]</p>	<p>All Payment Entitlements for your company and your users will migrate.</p> <p><b>*ACTION REQUIRED*</b></p> <p>For many Corporate Edition enrollments, some users currently have access to make external payments (ACH/Wire), but only have “View” access to the underlying accounts on which the payments are made. These users will be UNABLE to draft ACH or Wire payments from the accounts where they only have View access. Your Company Administrator can adjust entitlements appropriately in advance of the Conversion for affected users that have “View Only” access to certain accounts by changing the access level to “Basic” within the entitlements menu. Please <a href="#">review these instructions</a> to understand how to perform this change.</p>	<p>Action Required</p>
<p>Accounts Account Access</p>	<p>All of the active accounts previously available within Online Banking will also be available in Digital Banking. Users will have the same access to the accounts as they do in the current Online Banking platform.</p> <p>Account Nicknames you’ve defined in the current platform will appear in the new platform.</p>	<p>No Action Required</p>
<p>Account Transaction History</p>	<p>Your transaction history for the last six months will be migrated, however all transactions prior to that will not. If this is important history for you, we recommend that you download transactions from each of your accounts prior to conversion.</p> <p>Note that transaction categories are NOT supported in the new Digital Banking platform, so if you have been using categories and would like to preserve that data, you will need to export your transaction history and save an offline copy for your reference.</p>	<p>Optional Action Suggested</p>
<p>Scheduled and Recurring Internal Transfers</p>	<p>All of your existing scheduled one-time transfers between your Boston Private deposit accounts will be migrated and process as expected with the exception of Loan Payments (see below).</p>	<p>No Action Required</p>
<p>Scheduled and Recurring Loan Payments</p>	<p>If you have set up any scheduled or recurring transfers to Loan Accounts to make a payment, those payments will be cancelled. Loan Payments will now be handled through a new Loan Payment menu item and any existing payments will need to be set up again.</p>	<p>Action Required</p>

# Information Migration Guide for Businesses

Digital Banking Platform Conversion - 2019

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Internal Transfer Templates	<p>If you have set up templates for internal transfers, these will not migrate.</p> <p>You can learn more about how the new platform handles <a href="#">internal transfers</a> and <a href="#">multi-account transfers</a> now.</p>	Not Migrated
Bill Pay Users	<p>All of your company's Bill Pay users will continue to have access to Bill Pay if your company uses a single instance of Bill Pay.</p> <p><b>If your company uses multiple Bill Pay instances</b> (for example, to pay bills from multiple entities), your existing Bill Pay-only users will have new Digital Banking login Usernames set up for them and they will need to access Bill Pay via Digital Banking. You will no longer be able to access Bill Pay directly. You will need to work with your Relationship Manager to address this situation.</p>	Possible Action Required
Bill Pay Billers	Your Bill Pay Billers will be migrated.	No Action Required
Bill Pay Payments	Your Bill Pay Payments will be migrated and process as expected.	No Action Required
Bill Pay eBills	Your eBills will be migrated.	No Action Required

# Information Migration Guide for Businesses

Digital Banking Platform Conversion - 2019

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<p>User-Level Alerts</p>	<p>All of the Alerts that you've set up will migrate with a few exceptions:</p> <ul style="list-style-type: none"> <li>- Balance Alerts on set Intervals – alerts that were set up to notify you of your current balance on a fixed interval (daily, weekly, etc) will be removed.</li> <li>- Transaction Above Amount – mandatory alerts for transactions above certain balances have been removed and there is no longer a requirement to receive this alert.</li> <li>- Wire Approval – these alerts will now be triggered when a wire is processed instead of when it is approved.             <ul style="list-style-type: none"> <li>o If you receive email notifications today (advices), you will continue to receive them today.</li> </ul> </li> </ul> <p>We recommend that you review your alerts the first time you log in to the new Digital Banking platform.</p>	<p>Optional Action</p>
<p>Stop Payment Requests</p>	<p>All active stop payment requests will continue to be in effect.</p>	<p>No Action Required</p>
<p>Secure Message History</p>	<p>Your personal secure message history will not be migrated.</p>	<p>Not Migrated</p>
<p>Security Tokens [Corporate Only]</p>	<p>Users who currently have a hard or soft token assigned will have a single linked token migrated.</p> <p>For those users who have multiple active tokens, the new Digital Banking platform allows a single token only. We have selected the most recently activated soft token or, if no soft token exists, the most recently activated hard token as the “master” token to be migrated.</p> <p>If you need to change your linked token, you can call the Concierge Desk and provide a new Credential ID to link to your username.</p> <p><i>Note: tokens are no longer required for every login, instead are only required for the approval of payments in Corporate Edition.</i></p>	<p>No Action Required</p>

# Information Migration Guide for Businesses

Digital Banking Platform Conversion - 2019

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ACH Templates [Corporate Only]	All ACH templates will be migrated.  Please note that some templates with single recipients will be combined into a single template and all recipients will be migrated into the Recipient List, a new feature. <a href="#">Learn more about the Recipient List here.</a>	No Action Required
Scheduled ACH Payments and Collections [Corporate Only]	All scheduled payments and collections will be migrated and process as expected.	No Action Required
Recurring ACH [Corporate Only]	Your recurring ACH Payments and Collections will be migrated and process as expected.	No Action Required
ACH History [Corporate Only]	The specifics of your ACH history (created by, approved by, etc.) will NOT migrate. All past payments will be reflected in your account transaction history.	Not Migrated
Payroll Templates [Corporate Only]	All Payroll templates will be migrated.	No Action Required
Scheduled Payroll Payments [Corporate Only]	All scheduled Payroll payments will be migrated and process as expected.	No Action Required
Recurring Payroll [Corporate Only]	Your recurring Payroll Payments and Collections will be migrated and process as expected.	No Action Required
Payroll History [Corporate Only]	The specifics of your Payroll history (created by, approved by, etc.) will NOT migrate. All past payments will be reflected in your account transaction history.	Not Migrated
EFTPS Templates [Corporate Only]	All tax payments templates will be migrated.	No Action Required
EFTPS Scheduled Payments [Corporate Only]	All scheduled tax payments will be migrated and process as expected.	No Action Required

# Information Migration Guide for Businesses

Digital Banking Platform Conversion - 2019

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<p>EFTPS History [Corporate Only]</p>	<p>The specifics of your Tax Payment history (created by, approved by, etc.) will NOT migrate. All past payments will be reflected in your account transaction history.</p>	<p>Not Migrated</p>
<p>Wire Templates [Corporate Only]</p>	<p>All of your Wire templates will migrate, however the template names in the new Digital Banking platform are limited to 20 characters (vs the current 50) to enhance mobile capabilities.</p> <p>While you don't need to update the template names for them to function, the names will be cut-off at 20 characters.</p> <p><b>We highly recommend that you evaluate the necessary templates to conduct your business and rename them BEFORE conversion to have unique elements of the name in the first 20 characters. You should consider deleting all unnecessary templates to prevent clutter.</b></p>	<p>Optional Action</p>
<p>Scheduled Wires [Corporate Only]</p>	<p>Your scheduled Wire Payments will be migrated and process as expected.</p>	<p>No Action Required</p>
<p>Recurring Wires [Corporate Only]</p>	<p>Your recurring Wire Payments will be migrated and process as expected.</p>	<p>No Action Required</p>
<p>Wire History [Corporate Only]</p>	<p>The specifics of your Wire history (created by, approved by, etc.) will NOT migrate. All past payments will be reflected in your account transaction history.</p>	<p>Not Migrated</p>