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## Consumer Online Banking and Bill Pay Conversion Information

We will be converting your Online Banking information on Friday, March 4, 2022, starting at 3:00 pm PST. Your new enhanced Online Banking service will be available at 9:00 am PST on Monday, March 7, 2022.

### Important Dates

March 3, 2022, at 1:00 pm PST- Deadline for Bill Pay transactions using your current Online Banking system.

March 4, 2022, at 3:00 pm PST- Your current Online Banking and Mobile Banking services will become unavailable.

March 7, 2022, at 9:00 am PST- Your new Online Banking services will become available and accessible through the Bank of Southern California's website.

### Actions you Need to Take Prior to Friday, March 4, 2022.

To ensure a smooth transition to the new Online Banking system, we recommend that you complete these steps before Friday, March 4, 2022.

- Update Your Contact Information
  - Bill Pay
    - eBills are automatically cancelled on March 3, 2022. Electronic bills (eBills) are bills that you have elected to have presented to you through the bill payment system. All eBills that you are currently receiving will not be transferred to the new Online Banking system. You will need to re-enroll your eBills after Monday, March 7, 2022, in the new Online Banking system.
    - Bill Pay via ACH (electronic payments to individuals) will no longer be available in the new Online Banking system. These Bill Pay items will need to be re-input into the Bill Pay system using the check payment option.
      - As an alternative solution, we will start offering Zelle to our consumer online banking clients at the end of Q2 2022. Please keep your eye out for future communications regarding Zelle!
    - Schedule bill payments by March 3, 2022, at 1:00 pm PST. This is the last day to schedule a bill payment with the current Online Banking System. Bill payments that you have scheduled will process as normal.
    - Print bill payment history by March 3, 2022. Bill Pay history will not be available in the new Online Banking system. Please save/print your history before Thursday, March 3, 2022. If you need historical Bill Pay history after the conversion, please contact your local branch or call us at 844.BNK.SOCAL.
  - Scheduled Internal and External Transfers
    - Please print out details for external transfers that you have established in Online Banking. External transfers will need to be re-established on the new Online Banking system on March 7, 2022.
    - Scheduled internal transfers that you have established in Online Banking will process as normal.
  - Transaction History
    - After the system conversion, we will provide 18 months of eStatement history and downloadable transactional history going back to January 1, 2021. If you need transactional history prior to January 1, 2021, please download the transactional data prior to 3:00 pm on Friday, March 4, 2022.
    - Historical eStatements will be available to you in the new Online Banking system.
  - QuickBooks and Quicken
    - Download QuickBooks and Quicken transactions before Friday, March 4, 2022, at 3:00 pm.
    - After 3:00 pm PST on Friday, March 4, 2022, the Online Banking system will not be available to download transactions into QuickBooks and Quicken. After the system conversion, you will need to perform a few tasks to activate the services to your software.
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## Actions You Need to Take on Monday, March 7, 2022

- Experience Your New Online Banking System
  - Login to your Online Banking System by visiting our website: [www.BankSoCal.com](http://www.BankSoCal.com). Our security feature will require you to validate your identity through a One-Time Security Code.
  - For more details including information about your new login credentials, please refer to the detailed instructions provided in the Quick Start Guide section below.
  - Review your account information and set up your customizable preferences.
- Create Account Alerts
  - Account alerts will need to be **recreated**. Our new enhanced alert system has many available options to help you manager your accounts.
- eStatements
  - Once you have successfully logged in to your Online Banking, you will have to **re-enroll** for online eStatements.
- Bill Payment
  - **Re-establish** eBills: You will need to re-enroll your eBill(s) that were cancelled prior to the system enhancement.
  - Review recurring Bill Payments to ensure accuracy of information.
  - **Re-establish** Bill Payments that were previously set up to pay electronically via ACH.
- **Re-Establish** Scheduled Account-to-Account or External Transfers
  - Review recurring Account-to-Account/Internal transfers to ensure accuracy of information.
  - Any external transfers will need to be re-established.
- **Reactivate** QuickBooks and Quicken
  - For complete instructions, please visit our dedicated conversion webpage [www.banksocal.com/conversion](http://www.banksocal.com/conversion).
- Download our BSC Mobile Consumer app
  - Download the BSC Mobile Consumer app on your mobile device:
    - iPhone users: Search **Bank SoCal- Retail** in your App Store
    - Android users: Search **Bank SoCal- Retail** in your Google Play store
    - **Important Note: All users must first sign into the Bank of Southern California Personal Online Banking website using a Desktop/browser before using the BSC Mobile Consumer app.**
- Update Favorites/Bookmarks
  - If you have saved the login page on your web browser, please be sure to delete the former page and create a new bookmark/favorite for the new login page.
  - For more details, please refer to the Quick Start Guide section.

## Quick Start Guide

Please note that you will continue to use your existing Online Banking ID (which will be referred to as “User ID” in the new Online Banking System) during the login process.

- NOTE: If there are any changes that need to be made to your individual User ID, we will send additional communications and instructions prior to the conversion.

### Your temporary password:

- Your temporary password was included in a message attachment delivered on 02/04/2022 through online banking. Please log into online banking to access this information.
- For customers who do not have an SSN or U.S. address on file (e.g., out-of-country customers), please contact your local branch or call us at 844.BNK.SOCAL.

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## Logging In

1. Please visit our home page at BankSoCal.com to login to Consumer Online Banking.
2. In the upper right-hand corner, select Client Login and select Bank SoCal Personal Online Banking.
3. Enter the User ID and the temporary password. You may save this page as a bookmark/favorite on your browser.
4. Once you have successfully entered your login credentials, the One-Time Security Code screen will be displayed. To safeguard your Online Banking session, you will be prompted to validate your identity with a One-Time Security Code. Click the "Continue with Security Code" button.

The One-Time Security Code screen will appear, and you may select one of the following options to confirm your identity.

***Important Note: If you do not recognize the last 4-digits of the phone numbers that are displayed on the One-Time Security Code screen, please cancel, and try to log in again. This is an indication that you have not entered your login credentials correctly. The incorrect phone numbers that are displayed are system generated and serve as an added security feature.***

- a. Phone Verification option
    - i. To proceed with the phone verification option, click "Continue with Security Code" and select a phone number.
    - ii. You will be called and asked to enter the One-Time Security Code that is displayed on your screen.
      1. You will need to either speak or enter the One-Time Security Code that is shown on the screen once you receive the call.
      2. You will have three (3) attempts to correctly speak or enter the code.
    - iii. After completing the phone call, click "Phone Call Completed." You will be forwarded to the Password page.
  - b. SMS Text Message (Please note that based on your phone carrier contract, you may be charged a standard text message rate for SMS.)
    - i. To proceed with the text verification option, click "Continue with Security Code" and select the "Text Message" option. Please note that a text message must be sent to a mobile phone number that we currently have on file for you at the Bank.
    - ii. Enter the mobile phone number and select "Send Text Message."
    - iii. A text message containing a One-Time Security Code will be sent to your mobile phone. The mobile number must match a number on record with the Bank.
    - iv. Enter the One-Time Security Code and click "Submit." You have three (3) attempts to enter the security code correctly. You will be forwarded to the Password page if entered correctly.
5. Once you have successfully completed your authentication process, you will be prompted to enter your password. Please note that passwords are case-sensitive.
  6. Enter your temporary password and click "Sign In." As this is your first time logging in to the new Online Banking system, you will be prompted to change your password
  7. Enter your new password in both fields and click "Submit." Please note the following password requirements:
    - a. Must be at least 8 characters in length
    - b. Must include at least one uppercase letter, one lowercase letter, one number, and a special character
  8. Establish account alerts located under the Customer Service tab, "Manage alerts." There are alert options available that can be sent to you via email and/or SMS text message.

## Online Banking Assistance

If you experience any issues or need assistance with your Online Banking services, please contact the Bank of Southern California's Treasury Services Department at 844.BNK.SOCAL or email [TreasuryTeam@BankSoCal.com](mailto:TreasuryTeam@BankSoCal.com).