

# Troubleshooting Connected Accounts

In this guide, we will walk you through basic troubleshooting steps you can take to correct 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. If you are still experiencing errors, please reach out to our team for further troubleshooting assistance.

## Unable to get the most recent values

When we are having trouble receiving the most recent account values, you may see an error. If you are receiving this error, many times a simple refresh of the connection will update the account values to what the institution is displaying.

In the notification bar, click the link that says **Click to Fix**. Next, click the **Refresh** icon. This will refresh the entire connection and pull the most recent account values. If the refresh does not fix the error, contact our support team for further troubleshooting assistance.

Financial Institution

The institution rejected your credentials. [Click to close](#)

Please verify that you can log into [Institution](#) then enter your credentials in the form below:

User Name

Password

[Connect](#)

Mortgage - Mortgage 11/26/2017 8:08PM \$171,822

Financial Institution Website URL

## The institution rejected your credentials

This error occurs when attempting to connect to the institution and the credentials are rejected by the institution. The most common reason an institution might reject your credentials is because the username or password has been changed.

Click the banner to fix. First, confirm you can log in to the institution directly by clicking the institution name. A new browser tab will open for you to confirm your credentials. If they work, navigate back to your wealth management site, and re-enter your credentials and click **Connect**.

Financial Institution

The institution rejected your credentials. [Click to close](#)

Please verify that you can log into [Institution](#) then enter your credentials in the form below:

User Name

Password

[Connect](#)

Mortgage - Mortgage 11/26/2017 8:08PM \$171,822

Financial Institution Website URL

## Connection to this institution has been disconnected due to inactivity

If your connection requires regular attention but has not had any activity after a 30-day period, it will become disconnected. Your history will not be deleted, but the system will no longer attempt to update account values. [Click to fix](#) and enter the required information.

**Financial Institution**

The connection to this institution has been disconnected due to inactivity. [Click to close](#)

To reopen this connection, enter your credentials in the form below:

13 Digit Account Number (Enter N/A if not applicable)

User ID (Enter N/A if not applicable)

Web Password

[Connect](#)

Account: Qualified Retirement - Traditional 401(k) 08/17/2017 12:27AM \$41,717

Connection last updated 08/17/2017 12:27AM [Financial Institution Website URL](#)

## The institution is asking for additional verification

Things such as multi-factor authentication and additional verification can cause you to receive the prompt for additional verification. These prompts are coming directly from your financial institution as a security measure. We suggest logging into the financial institution's website directly to verify your security answers. If your answers are correct, re-enter your answers in your personal financial website and click [Connect](#).

**Financial Institution**

The institution is asking for additional verification. [Click to close](#)

What was your high school mascot?

In what city did you honeymoon?

[Connect](#)

Mortgage Mortgage - Mortgage 07/05/2017 07:27PM -\$11,263

Connection last updated 07/05/2017 03:26AM [Financial Institution Website URL](#)

## This connection needs attention

Click the [Institution URL](#). This will open the institution login page in a new browser tab. Confirm that you can log in. If your credentials are auto saved, make sure to manually enter them in to confirm that the credentials you supplied on your wealth management site will work on the institution site.

## No accounts found at the institution

Sometimes accounts are not immediately recognized. Click the [binoculars icon](#) to find new accounts. This will refresh with any accounts available at the institution.

**Financial Institution**

There were no accounts found at this institution.

Connection last updated 04/07/2015 04:45AM

[delete](#) [find new](#) [refresh](#)

[financialinstitution.com](#)

**Questions?** Call 888-362-4612 to learn more.