In order for aggregation download (in QBO) services to be available in conjunction with your Treasury Management migration to Unified Identity Service, please provide the following information via a ticket with Intuit. Select General Support > Website Change and add the information listed below in the Description (see Fig 1).

Log in to the Intuit Support site to create an OFX ticket: Contact Us - OFX | Intuit

If you (or someone at the bank) do not already have an Intuit OFX account, click here. It may take a couple of days for your account request to be approved. If needed, you may open a generic request ticket, which does not require a login.

The ticket for Intuit's work effort should be created no fewer than 30 days prior to your UIS migration date and no more than 60 days from your UIS migration date. Note that based on Intuit's time zone and working hours, UIS may be live for a brief period of time the day of your migration prior to the updated QBO instance being live.

Ticket Creation Timing	
Dates	**Times**
Min 30 to Max 60 days prior to UIS migration	Between 9:00 a.m. and 4:00 p.m Pacific Time (please allow for small time variances to requested time)

In addition to the required fields of Name, Email Address, and Phone Number, reference ticket numbers 113973 and 114625 when submitting your request, as well as the following information:

☐ Financial Institution name

☐ Financial Institution URL (public-facing website)

☐ Your bank's Treasury Management URL (standard or vanity)

Note: If the Treasury Management URL provided in the ticket is the same as the URL for your existing QBO instance for Treasury Management, it will be *replaced* with the one that supports the UIS login flow.

jack henry™

☐ Your UIS migration date

☐ The time you would like the UIS QBO instance made live for Express Web Connect (see times above)

☐ The display name users will see when connecting your bank to their QBO profile (see Fig 2).

Note: this will truncate at 30 characters and anything beyond that will not display to the users on the default view. In most cases this would be the same as what it is today for your current Treasury Management QBO instance.

Figure 1

Homepage URL

Complete the starred items below

Your Name*

    Enter Name

Your Email*

    Enter Email

Important: Please verify that your email is accurate; otherwise you will not receive our response.

Your Phone*

    (nnn)nnn-nnnn xnnnn

Issue Type*

    General Support

General Support*

    Website Change

Description (DO NOT INCLUDE PERSONALLY IDENTIFIABLE INFORMATION SUCH AS USERIDS, PASSWORDS, ACCOUNT NUMBERS, ETC.) *

Please reference ticket numbers 113973 and 114625

FI Name: Ovation Bank

FI URL: ovation-fi.com

TM URL: https://treasury.jackhenry.com/ovation3/login

UIS Migration Date: February 15, 2025

UIS MIgration Time: 9:00 a.m. Pacific Time

QBO Display Name: Ovation Bank - Treasury Management

jack henry™

Copy/Paste version of ticket information (be sure to change values!)

Please reference ticket numbers 113973 and 114625

FI Name: Ovation Bank

FI URL: ovation-fi.com

TM URL: https://treasury.jackhenry.com/ovation3/login

UIS Migration Date: February 15, 2025

UIS Migration Time: 9:00 a.m. Pacific Time

QBO Display Name: Ovation Bank - Treasury Management

Figure 2