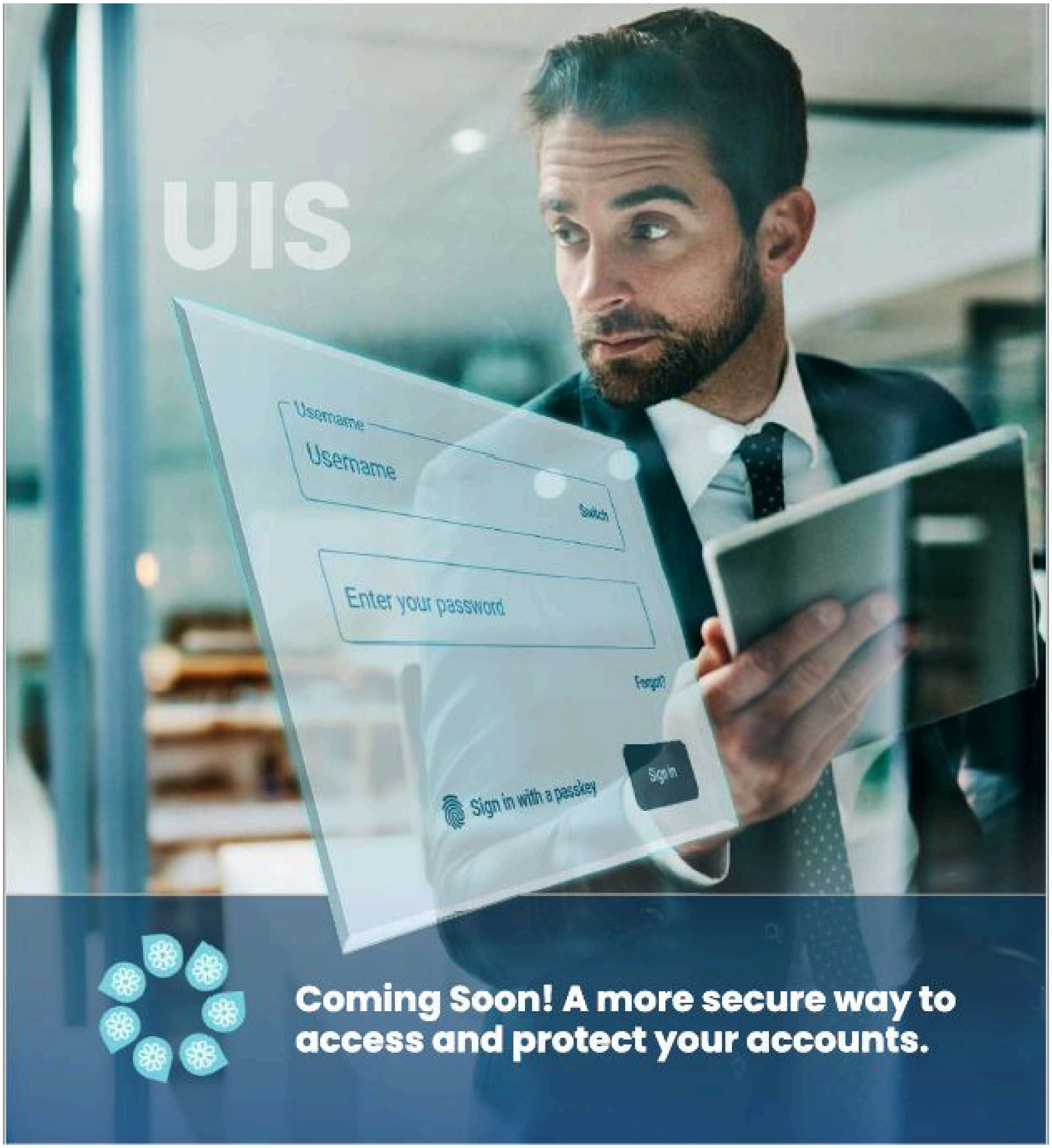
Treasury Management

Unified Identity Service (UIS) Enrollment Reference Guide



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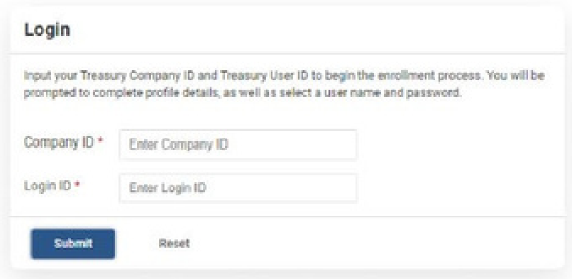
User Experience

1. Active users that have logged in 45 days prior will receive an enrollment email.
2. The Digital ID enrollment link will direct users to enter the Company ID and Login IDs currently used for online access. Action must be taken with 7 days of being issued. Once the link is clicked, enrollment must be completed within 45 minutes.

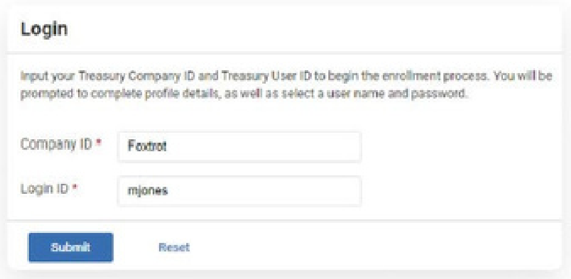


Login

Input your Treasury Company ID and Treasury User ID to begin the enrollment process. You will be prompted to complete profile details, as well as select a user name and password.

Company ID * Enter Company ID

Login ID * Enter Login ID



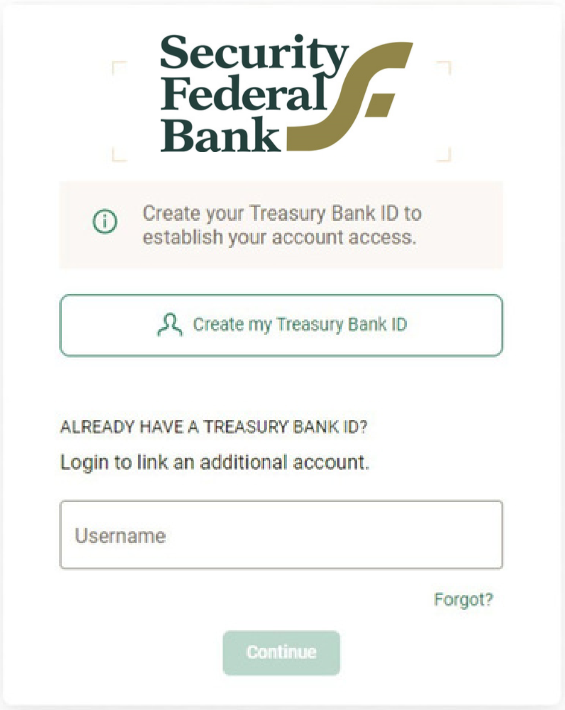
Login

Input your Treasury Company ID and Treasury User ID to begin the enrollment process. You will be prompted to complete profile details, as well as select a user name and password.

Company ID * Foxtrot

Login ID * mjones

3. Users will be prompted to creat their Treasury profile and Digital ID.

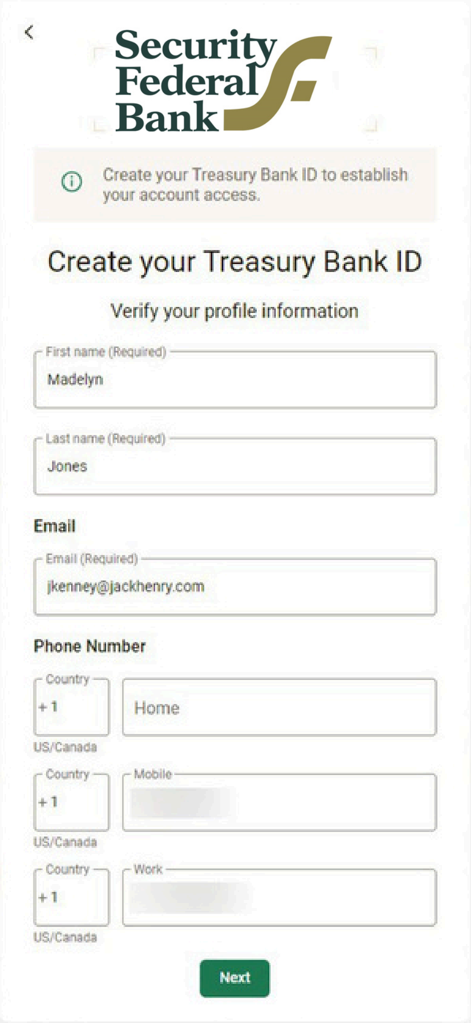


Create your Treasury Bank ID to establish your account access.

ALREADY HAVE A TREASURY BANK ID?

Login to link an additional account.

- Step 1 of User ID: Users will complete & verify profile information.
- Step 2 of User ID: Users will create their credentials. This Username/Digital ID and Password will be used for subsequent logins.



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ⓘ Create your Treasury Bank ID to establish your account access.

Create your Treasury Bank ID

Verify your profile information

First name (Required): Madelyn

Last name (Required): Jones

Email

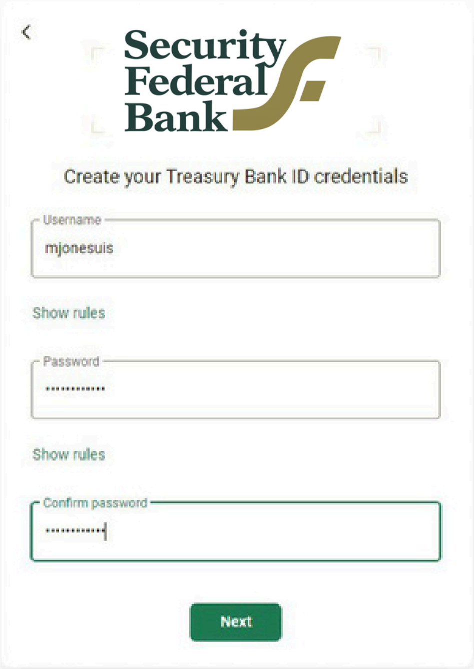
Email (Required): jkenney@jackhenry.com

Phone Number

Country: +1 US/Canada — Home

Country: +1 US/Canada — Mobile: [redacted]

Country: +1 US/Canada — Work: [redacted]



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Create your Treasury Bank ID credentials

Username: mjonesuis

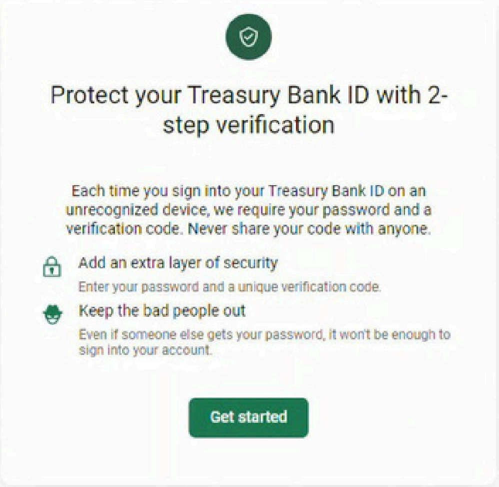
Show rules

Password: ••••••••••••

Show rules

Confirm password: ••••••••••••

4. Users will protect their accounts with 2-step verification and choose their prefferred method.



Protect your Treasury Bank ID with 2-step verification

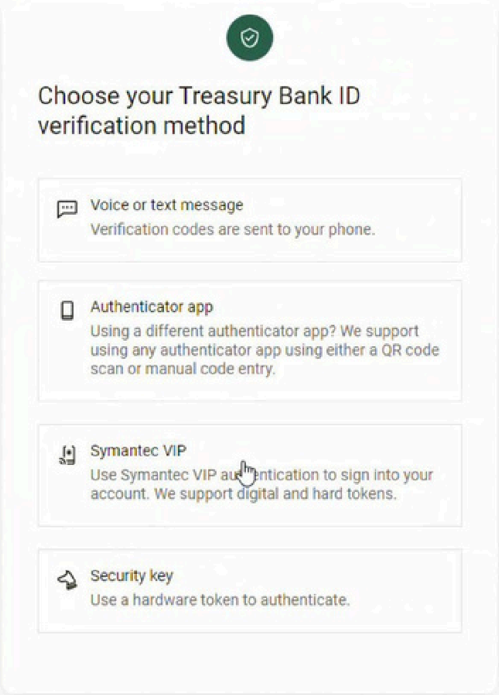
Each time you sign into your Treasury Bank ID on an unrecognized device, we require your password and a verification code. Never share your code with anyone.

Add an extra layer of security

Enter your password and a unique verification code.

Keep the bad people out

Even if someone else gets your password, it won't be enough to sign into your account.



Choose your Treasury Bank ID verification method

Voice or text message

Verification codes are sent to your phone.

Authenticator app

Using a different authenticator app? We support using any authenticator app using either a QR code scan or manual code entry.

Symantec VIP

Use Symantec VIP authentication to sign into your account. We support digital and hard tokens.

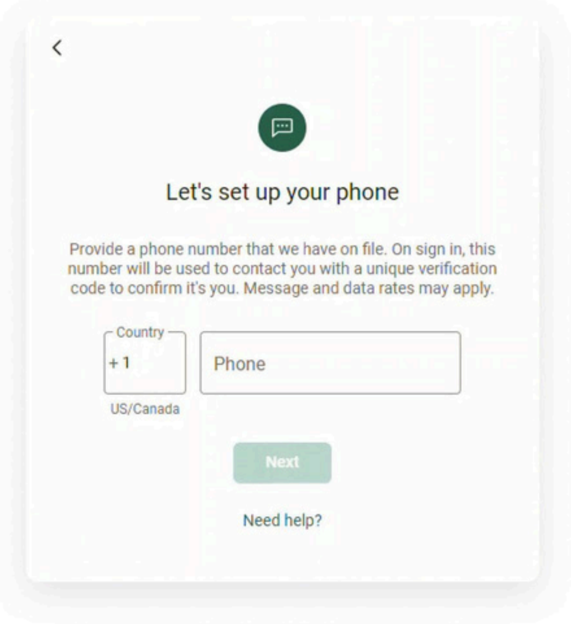
Security key

Use a hardware token to authenticate.

2-Factor Verification Methods

Users will have the option to choose from 4 different verification methods: voice or text message, authenticator app, Symentic VIP, or a security key.

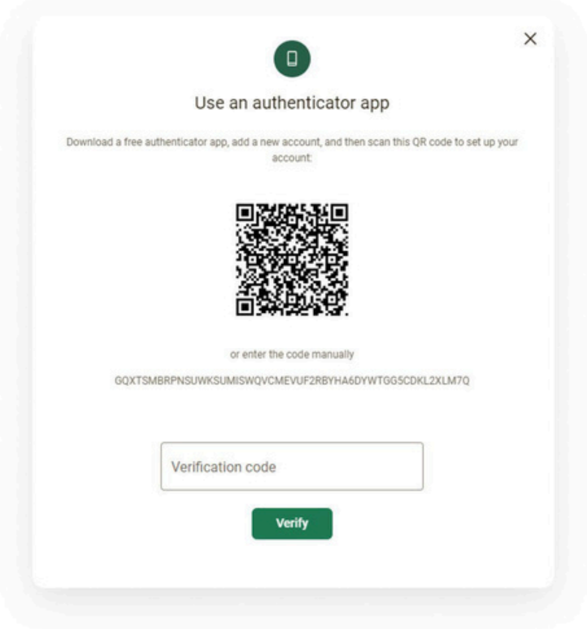
Voice or text message



Let's set up your phone

Provide a phone number that we have on file. On sign in, this number will be used to contact you with a unique verification code to confirm it's you. Message and data rates may apply.

Authenticator app



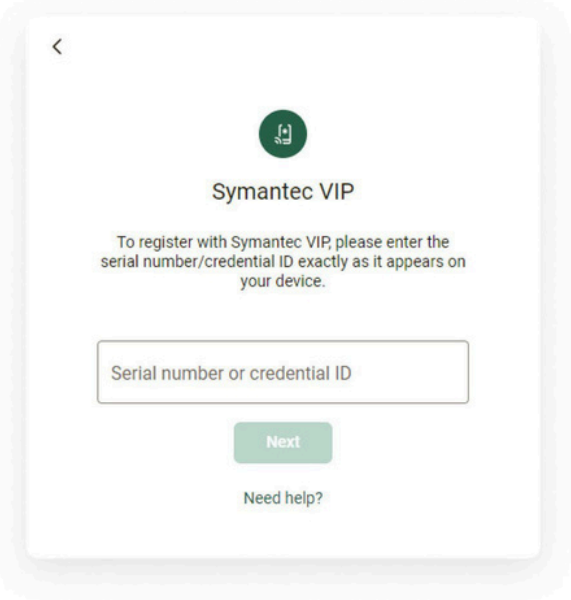
Use an authenticator app

Download a free authenticator app, add a new account, and then scan this QR code to set up your account:

or enter the code manually

GQXTSMBRPNSUWKSUMISWQVCMEVUF2RBYHA6DYWTGG5CDKL2XLM7Q

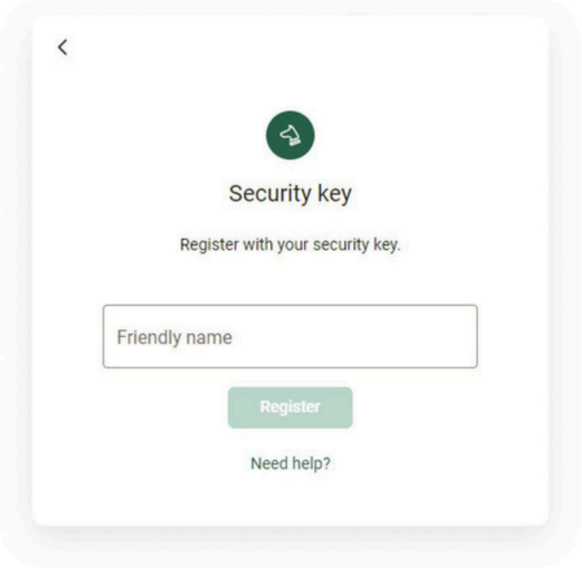
Symantec VIP



Symantec VIP

To register with Symantec VIP, please enter the serial number/credential ID exactly as it appears on your device.

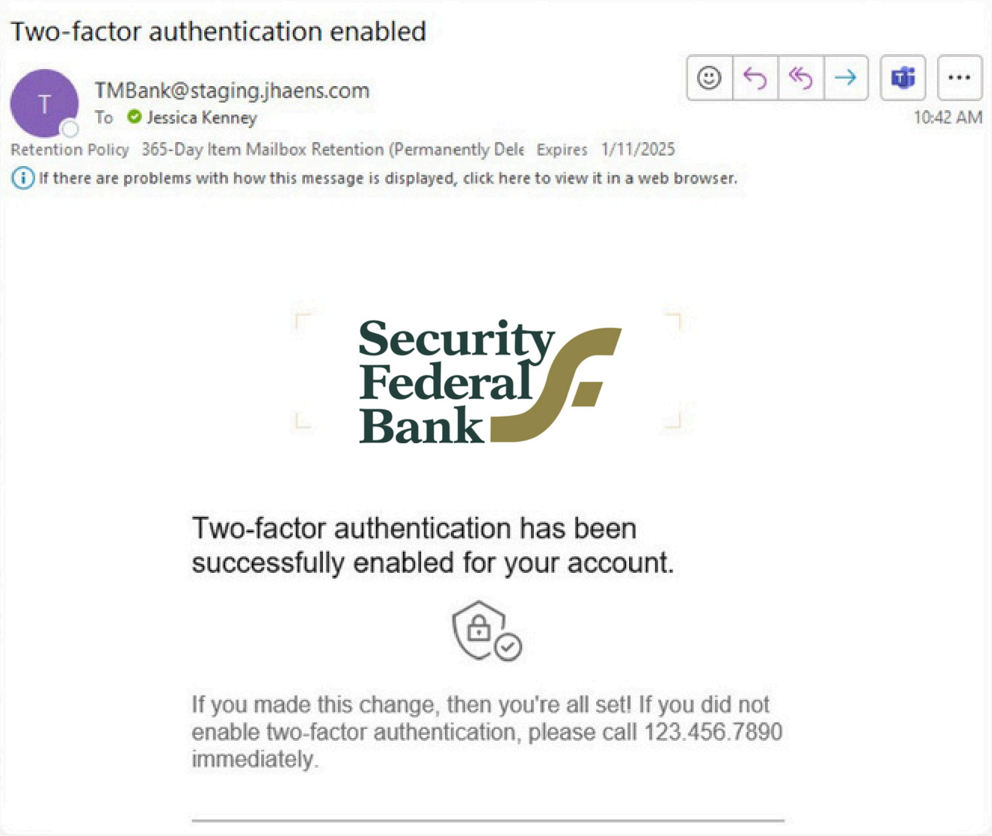
Security key



Security key

Register with your security key.

5. When complete, user receives an email confirming 2FA verification setup.



Two-factor authentication enabled

TMBank@staging.jhaens.com
To Jessica Kenney
10:42 AM

Retention Policy 365-Day Item Mailbox Retention (Permanently Dele Expires 1/11/2025

If there are problems with how this message is displayed, click here to view it in a web browser.

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Two-factor authentication has been successfully enabled for your account.

If you made this change, then you're all set! If you did not enable two-factor authentication, please call 123.456.7890 immediately.

Frequently Asked Questions

Can a user keep their existing username?
It is possible that the user’s existing LoginID can be used again, however usernames now need to be unique across the entire database. In many cases a new username will have to be chosen.

What if the user logs into multiple companies?
During migration, each user will receive an email to create their Digital ID. If the same email address is tied to more than one user, whether a different company or the same company, each will receive an individual email. The first email link clicked on will take the user through the steps outline above. When they click the link in the second (or third) email, they will be able to use the “Already have a Treasury Bank ID?” login to link an additional account. Upon entering their Digital ID their accounts will be linked together under that Digital ID. Upon subsequent logins the user will get to chose which company they want to access.

What are the new rules for creating a username?
Usernames must be between 4 and 64 characters in length.
Usernames can contain letters (a-z), dashes (-), underscores (_), apostrophes (‘), and periods (.) and can begin or end with non-alphanumeric characters except periods (.) and spaces.
Usernames cannot contain more than one period (.) in a row, accented letters, ampersands (&), equal signs (=), brackets (<,>), plus signs (+), at signs (@), or commas (,).

What are the new rules for creating a password?
Passwords must be between 8 and 64 characters in length.
All ASCII and Unicode characters (including spaces) are supported for passwords.
Passwords must not match or contain your username and must not begin or end with a space. Passwords will not expire.

Can users lock themselves our with UIS at login?
Users can be locked with multiple failed 2FA verification attempts, with varying failed attempts based on the authentication method. Users cannot be locked out due to invalid password attempts.

Can the ‘Don’t ask for codes again while using this browser’ feature be enabled with the UIS login?
Yes, it can be enabled. The ‘remember this browser’ feature is tied to the browser that is used during selection of the 2FA method. If a brute-force attack was attempted, or a login from a different browser was attempted, 2FA prompts would occur and access would not be granted until successfully validated using one of the established 2FA methods. Additionally, users that integrate with Intuit services (Quickbooks Online/QBO/Express Web Connect) will need to elect this feature for the third-party service to work successfully.

We’re here for you every step of the way!

We hope that you are as excited about this new journey as we are. If you have any additional questions or concerns, please reach out - we’re happy to help in whatever way we can.
Call us at 803-641-3000 or email at
treasurymanagement@securityfederalbank.com.

As always, thank you for trusting us to serve you!