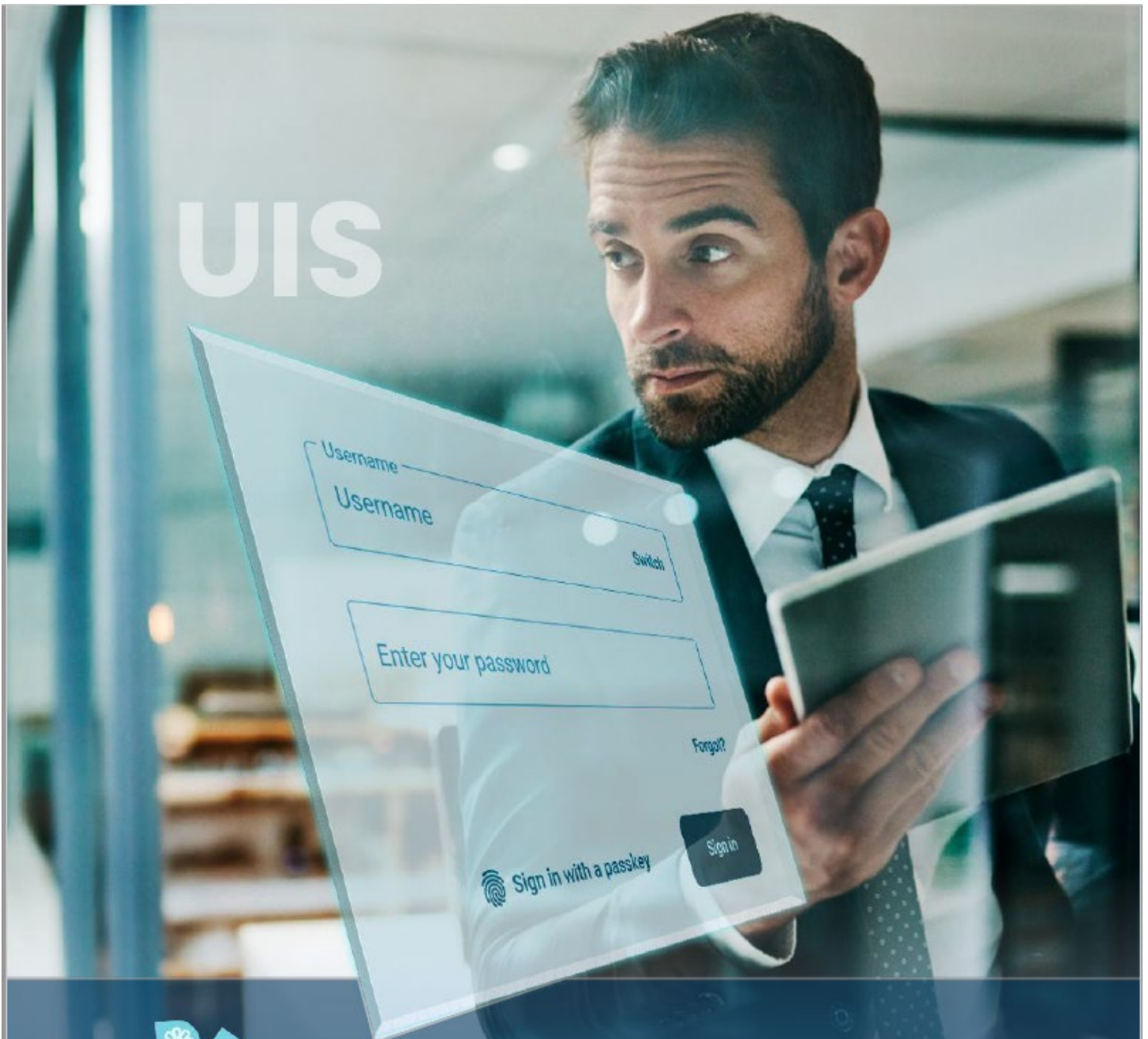
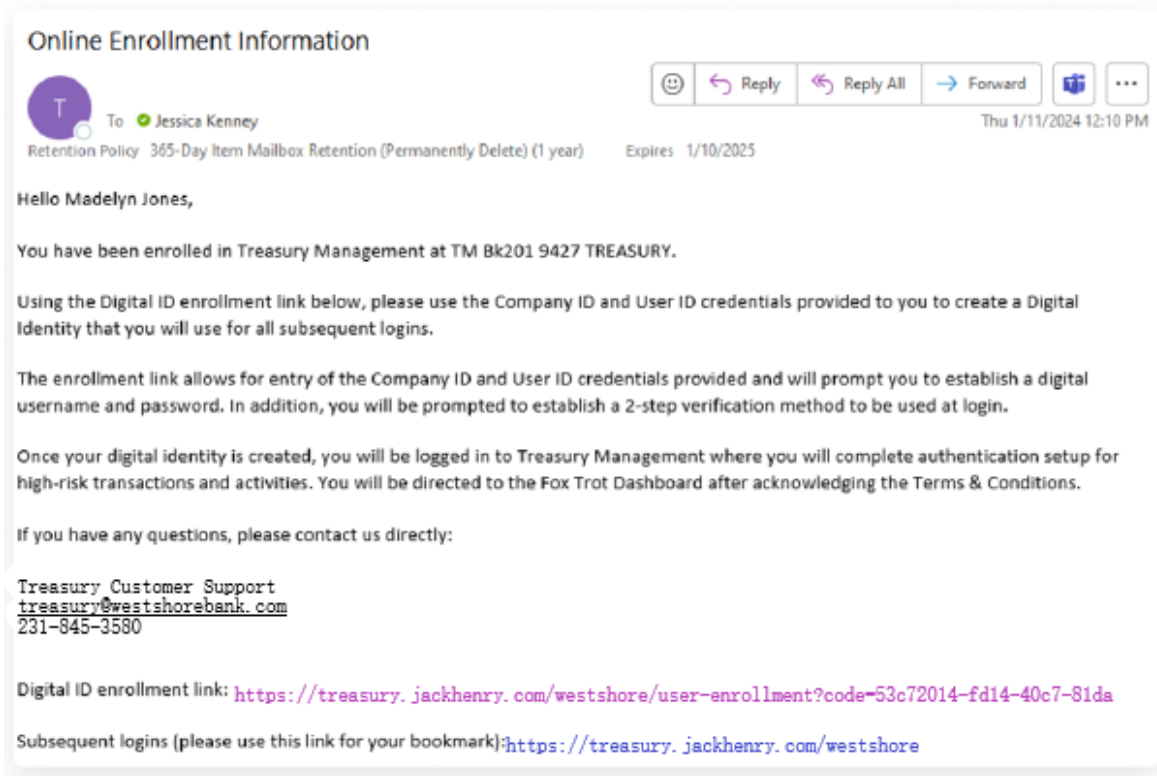


Treasury Management

# unified identity service (UIS) enrollment reference guide



1. Users that have logged in the past 45 days will receive an enrollment email.



2. The Digital ID enrollment link will direct users to enter the Company and Login IDs provided. This link is good for 7 days and enrollment must be completed in 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 \*

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 \*

Login ID \*

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

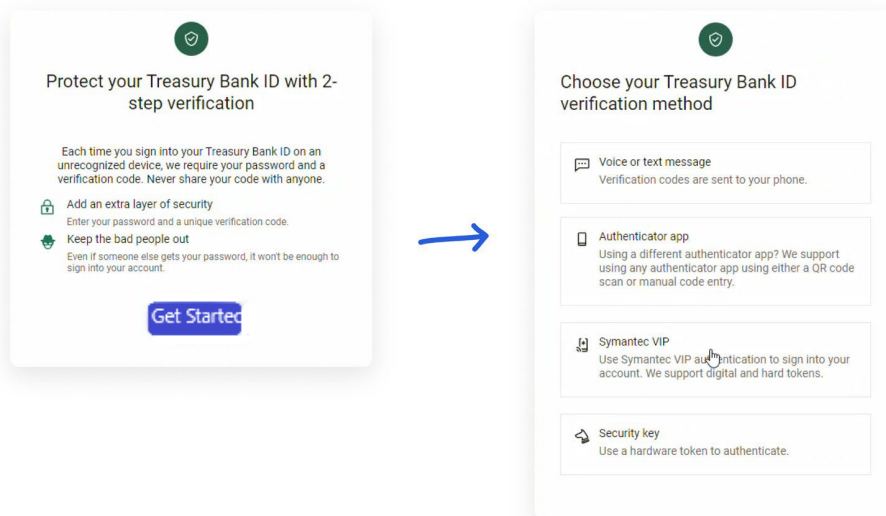
The screenshot shows the West Shore Bank logo at the top. Below it, a message says "Create your Treasury Bank ID to establish your account access." There is a button labeled "Create my Treasury Bank ID". Below that, it asks "ALREADY HAVE A TREASURY BANK ID? Login to link an additional account." There is a "Username" input field and a "Forgot?" link. At the bottom is a blue "Continue" button.

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

The first screenshot shows the "Create your Treasury Bank ID" screen with the sub-header "Verify your profile information". It contains fields for "First name (Required)" with the value "Madelyn", "Last name (Required)" with the value "Jones", "Email (Required)" with the value "jkenney@jackhenry.com", and three "Phone Number" sections for Home, Mobile, and Work, each with a country dropdown set to "+1" and a US/Canada indicator. A blue "Next" button is at the bottom.

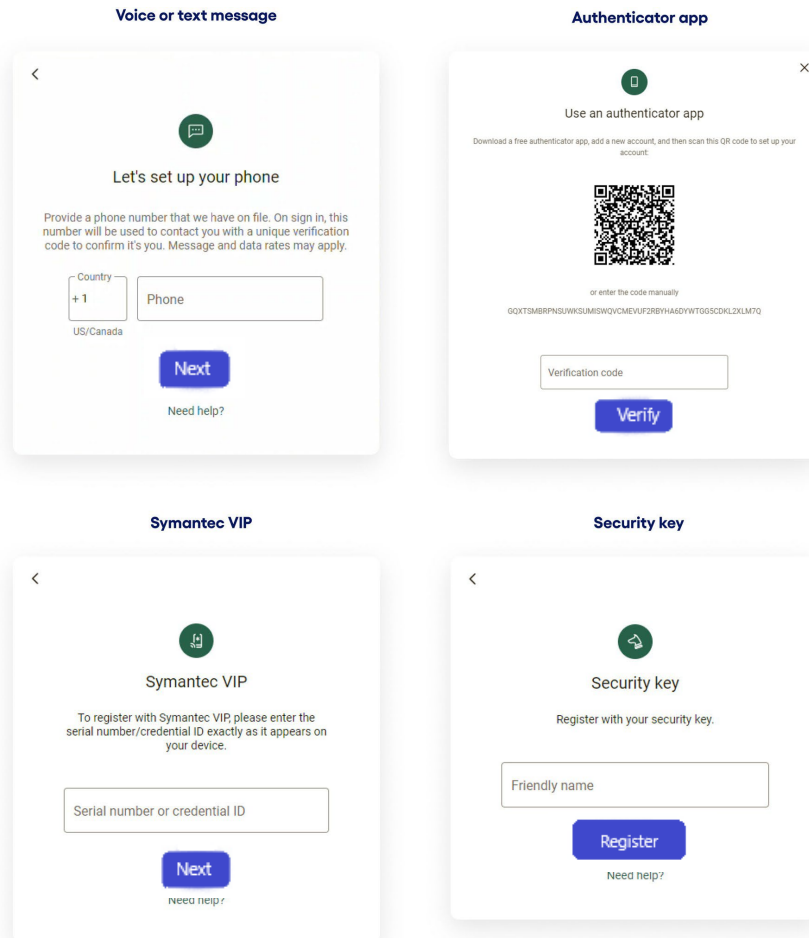
An arrow points to the second screenshot, which shows the "Create your Treasury Bank ID credentials" screen. It has a "Username" field with the value "mjonesuis", two "Password" fields (one with dots), and a "Confirm password" field with dots. A blue "Next" button is at the bottom.

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

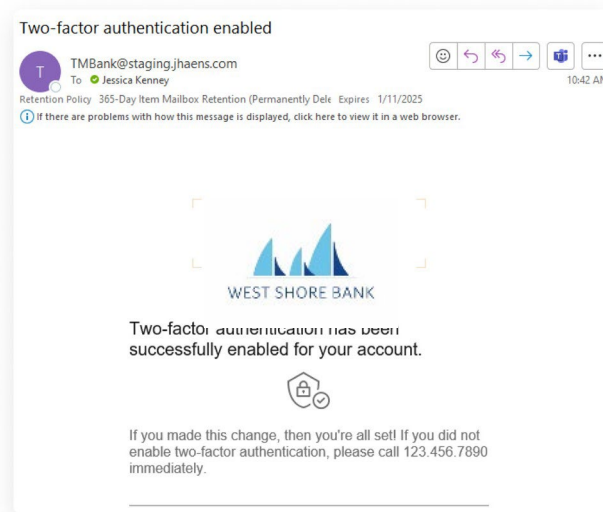


2-Step Verification Methods

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



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



## frequently asked questions

### Can a user keep their existing username?

It is possible that the user's existing Login ID 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, especially if there are many users with the Username of Admin. One way to choose a username that will already be familiar is to use a combination of the existing Company ID plus the existing Login ID. For example, a Company ID of C102345 with a Login ID of janedoe could be a UIS ID of C102345janedoe.

### What if an end user currently 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 outlined 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 choose which company they want to access.

**Please note if you are a QuickBooks user for multiple companies using DirectConnect or WebConnect linking your accounts to a single digital ID is not recommended.**

## 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), numbers (0-9), 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, accents, 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 out 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 integration 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're 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 231-845-3580 or email at [treasurycustomerservice@westshorebank.com](mailto:treasurycustomerservice@westshorebank.com). As always, thank you for trusting us to serve you!