

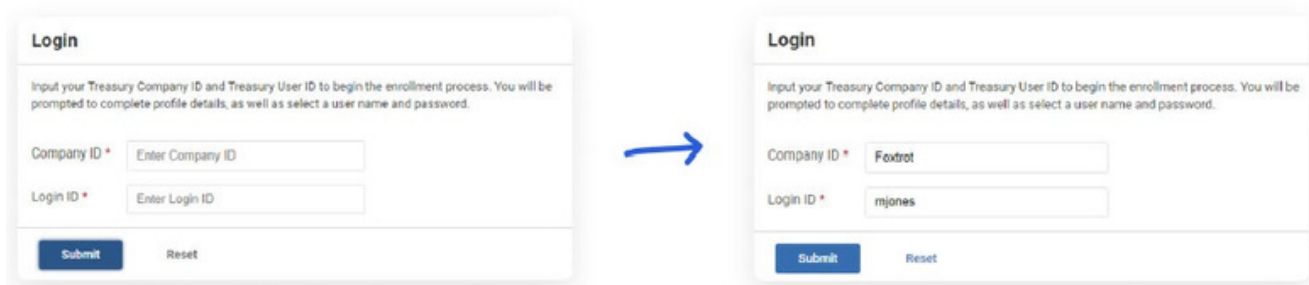
Unified Identity Service (UIS) Enrollment Reference Guide



**Coming Soon! A more secure way to
access and protect your accounts.**

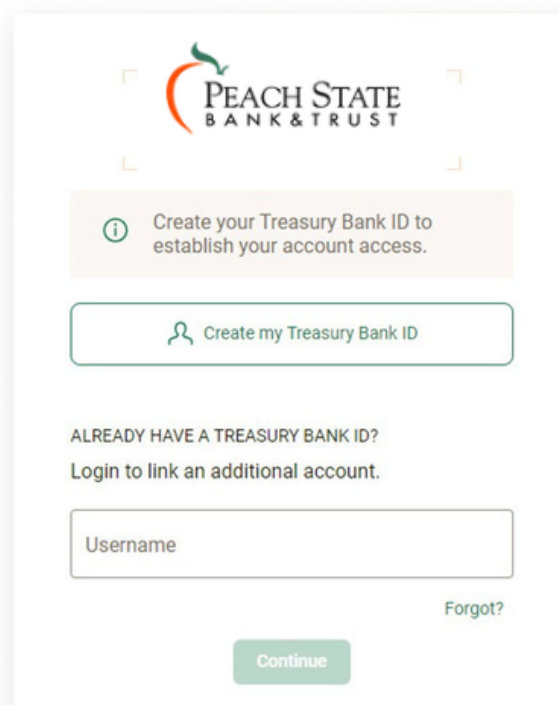
User Experience

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.



The diagram illustrates the login process. On the left, a 'Login' form prompts the user to '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.' It features two input fields: 'Company ID *' with the placeholder 'Enter Company ID' and 'Login ID *' with the placeholder 'Enter Login ID'. Below these fields are 'Submit' and 'Reset' buttons. A blue arrow points to the right, where the same 'Login' form is shown, but the input fields are pre-filled with 'Fox trot' for Company ID and 'mjones' for Login ID.

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



The screenshot shows the 'PEACH STATE BANK & TRUST' logo at the top. Below it, an information icon (i) is next to the text: 'Create your Treasury Bank ID to establish your account access.' A large button with a person icon and the text 'Create my Treasury Bank ID' is centered. Below this, the text reads: 'ALREADY HAVE A TREASURY BANK ID? Login to link an additional account.' There is a 'Username' input field, a 'Forgot?' link, and a 'Continue' button at the bottom.

- 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.

The diagram illustrates the two-step process for creating a Treasury Bank ID. A blue arrow points from the first screen to the second.

Step 1: Verify your profile information

PEACH STATE BANK & TRUST

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 Home

US/Canada

Country
+1 Mobile

US/Canada

Country
+1 Work

US/Canada

Next

Step 2: Create your Treasury Bank ID credentials

PEACH STATE BANK & TRUST

Create your Treasury Bank ID credentials

Username
mjonesuis

Show rules

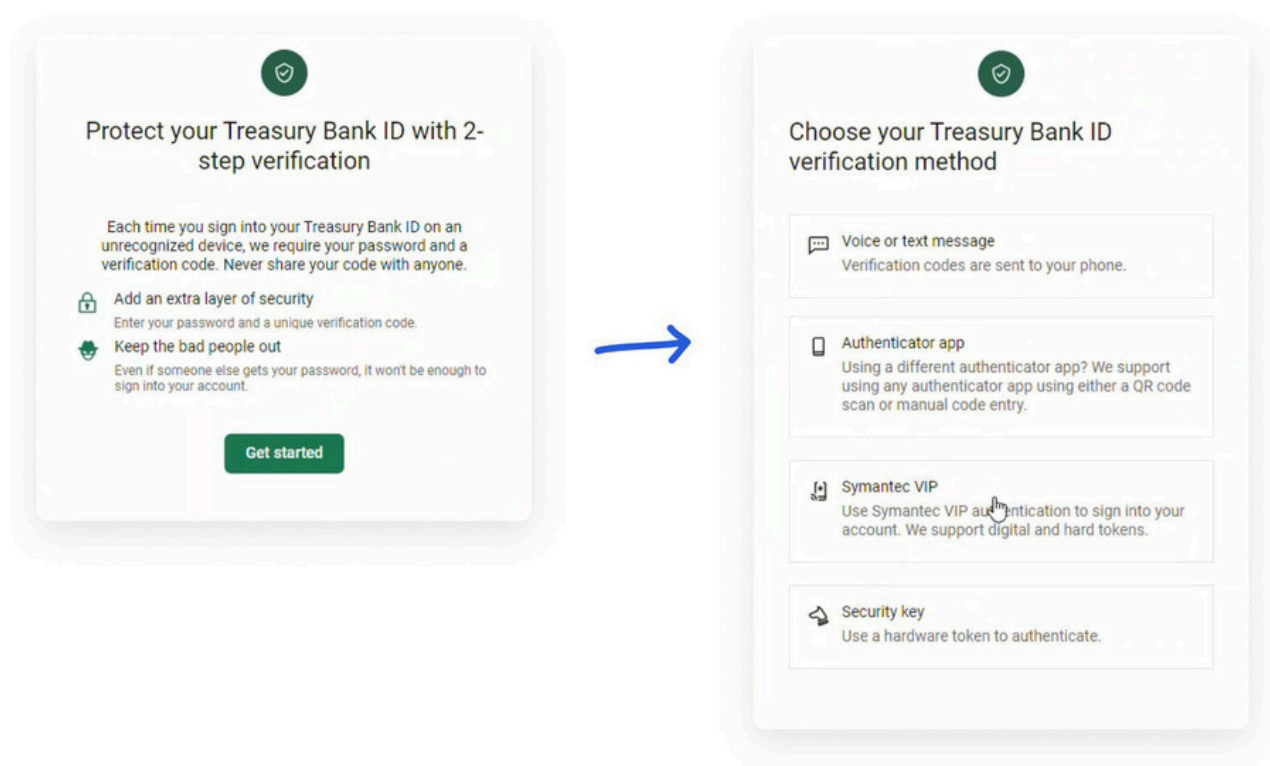
Password

Show rules

Confirm password

Next

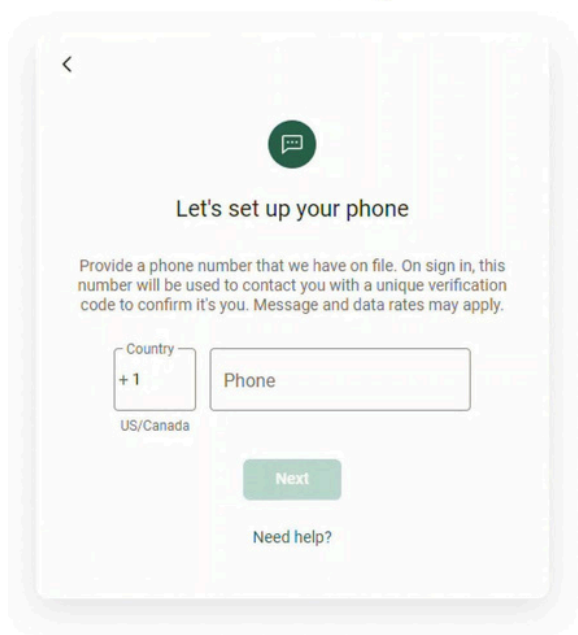
4. Users will protect their accounts with 2-step verification and choose their preferred method.



2-Factor 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.

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.

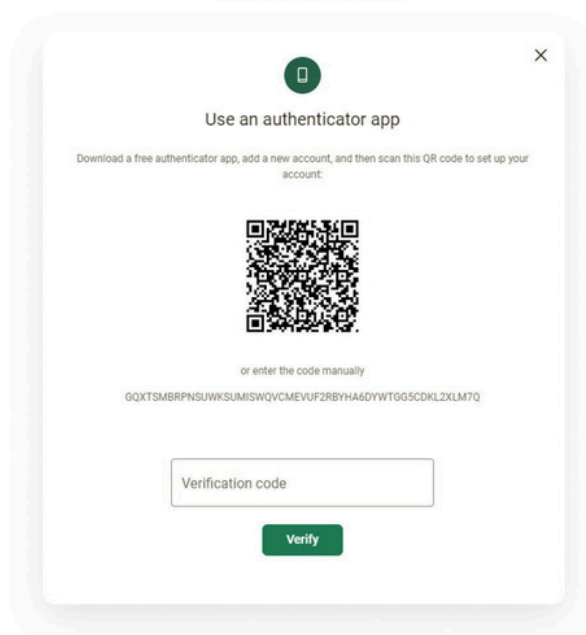
Country
+1
US/Canada

Phone

Next


Need help?

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.



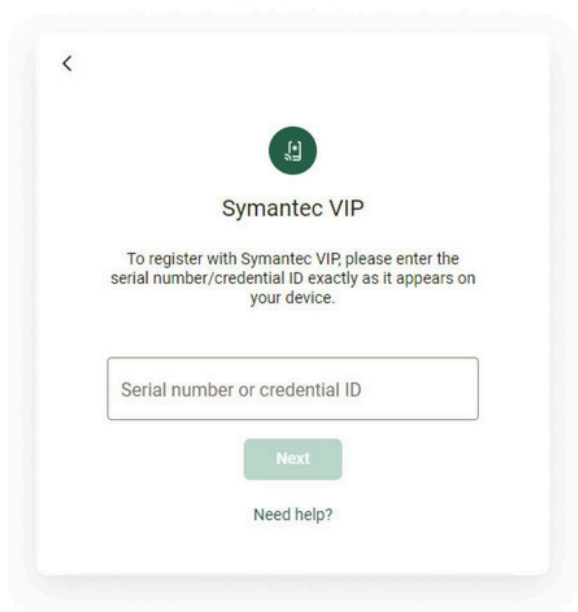
or enter the code manually

GQXTSMBRPN SUWKSUMISWQVCMEVUF2RBYHA6DYWTG6SCDKL2XLM7Q

Verification code

Verify

Symantec VIP



Symantec VIP

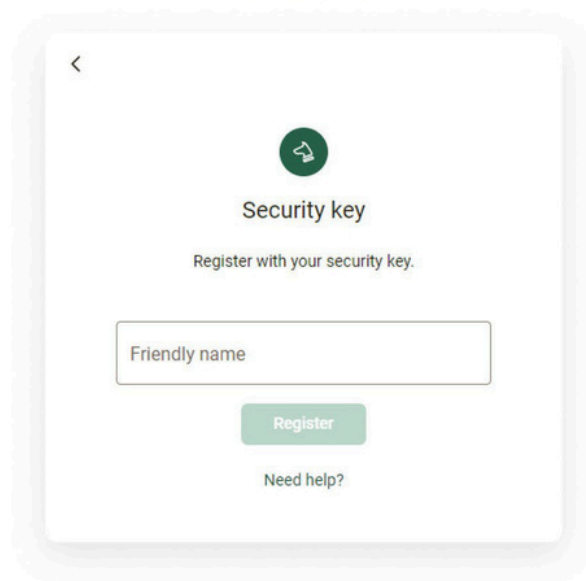
To register with Symantec VIP, please enter the serial number/credential ID exactly as it appears on your device.

Serial number or credential ID

Next

Need help?

Security key



Security key

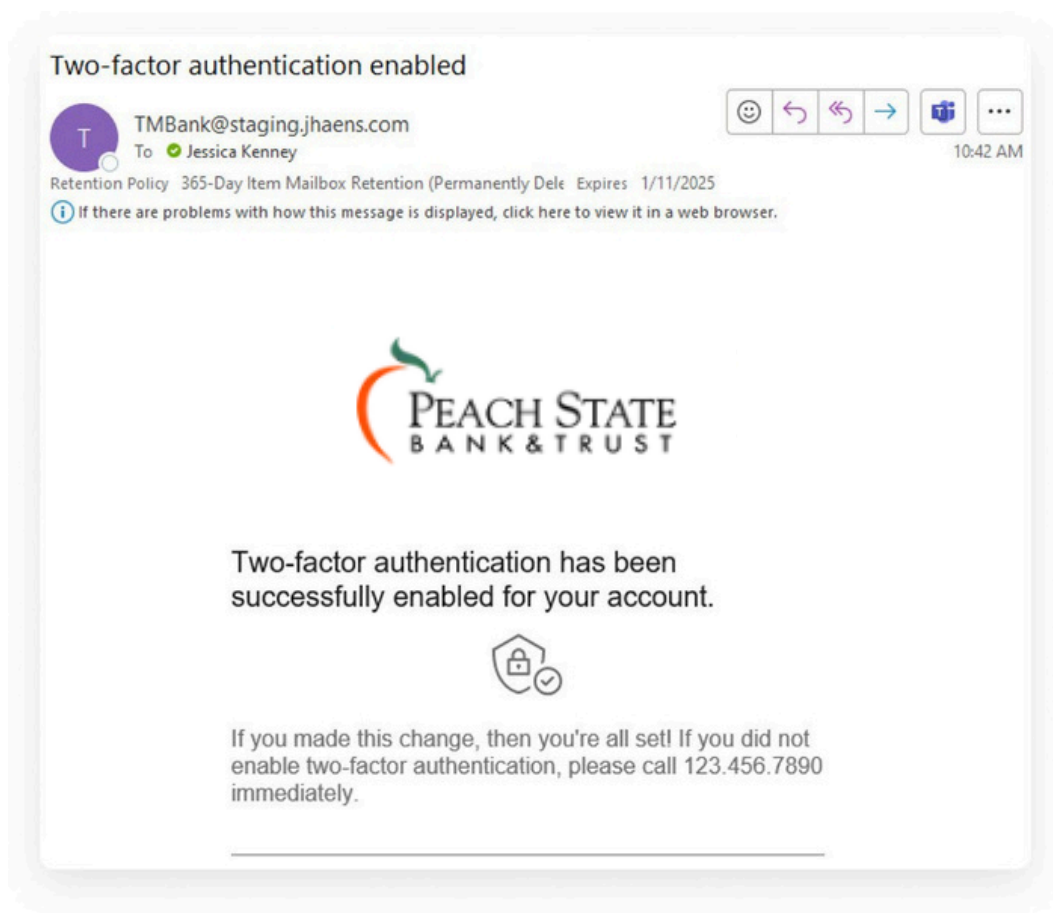
Register with your security key.

Friendly name

Register

Need help?

5. When complete, 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 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?

Username must be between 4 and 64 characters in length.

Username can contain letters (a-z), dashes (-), underscores (_), apostrophes ('), and periods (.) and can begin or end with non-alphanumeric characters except periods (.) and spaces.

Username 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 password.

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 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 excited about this new enhancement

If you have any additional questions or concerns,

Please reach out - we’re happy to help!

Call us at 770-536-1100 or email at
treasurymanagement@peachstatebank.com.

