



**PENNSYLVANIA
TRUST**

Online Account Access – Logging In

Initial Enrollment Procedures

The security of our client information is of the utmost importance to us, and we are committed to making your online experience safe and secure. During initial enrollment, you will be required to create a security profile.

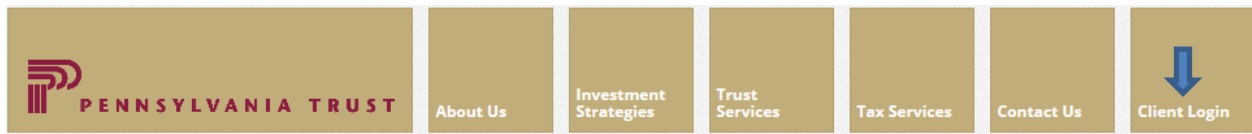
Before Starting

You will need the following:

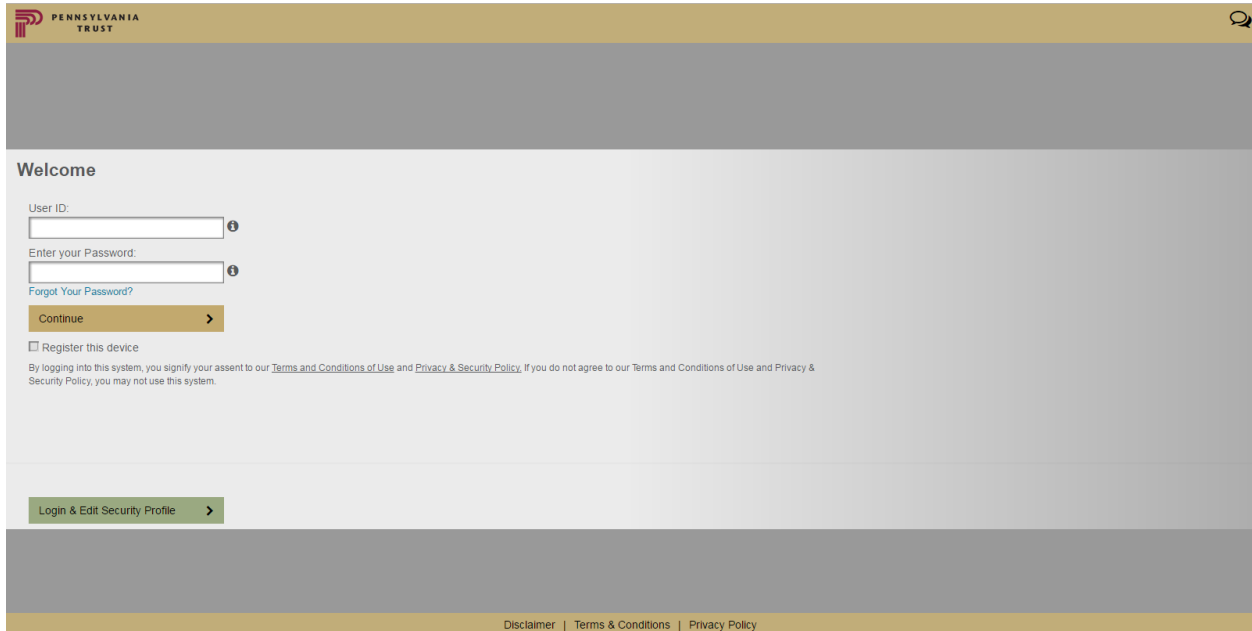
- ✓ User ID and Temporary Password received from Pennsylvania Trust.
- ✓ Access to the inbox for the email address that is your User ID.
- ✓ Compatible device and browser with which to access the website, as well as ability to receive and view emails on a different browser, tab, or device.
- ✓ Access to penntrust.com.

STEP 1

Navigate to penntrust.com and click the “Client Login” menu option.



You will access to the Client Access Login screen.

A screenshot of the Client Access Login screen. At the top left is the Pennsylvania Trust logo. Below it, the word "Welcome" is displayed. There are two input fields: "User ID:" and "Enter your Password:". Below the password field is a link for "Forgot Your Password?". A "Continue" button with a right-pointing arrow is positioned below the input fields. Below the button is a checkbox labeled "Register this device". At the bottom of the main content area is a "Login & Edit Security Profile" button with a right-pointing arrow. At the very bottom of the page is a footer with links for "Disclaimer", "Terms & Conditions", and "Privacy Policy".

Client Access Login screen

STEP 2

Enter your User ID, which is the email address you have on file with Pennsylvania Trust and the temporary password you received from Pennsylvania Trust and click “Login & Edit Security Profile”

Login & Edit Security Profile >

Note: if you do not have a temporary password, please call us at 877-870-1073 for assistance.

STEP 3

The One Time PIN and Terms and Conditions screen will appear. A One Time PIN is automatically sent to your registered email address when you access this screen.

Log on to your email in another window to retrieve the One Time PIN. After reviewing the Terms and Conditions (you must scroll to the bottom of the Terms and Conditions), enter the One Time PIN into the text box on the screen and click Continue Login.

If you did not receive a One Time PIN, you may click the “Send a new one-time PIN” link on the screen. As a security measure, the one time password is only valid for 20 minutes.

Note: If you do not receive an email, be sure that you typed your User ID correctly, and check your email’s spam folder.

WELCOME TO PENNSYLVANIA TRUST

Welcome mguopa

Please scroll down and view all Terms and Conditions, click the check box to accept.

IMPORTANT INFORMATION ABOUT THE NEW LOGIN PROCESS
We've changed the way you login to provide even greater security when accessing your account online.

During the enrollment process, you will be asked to provide answers to security questions and a valid phone number. This information will be used as part of our multi-factor authentication process to ensure the safety and security of your information. If you are logging in from an unrecognized device, you will be prompted to select a method for a secondary security factor. You may choose to answer two security questions or receive a one-time PIN via email, SMS Text, or voice call. Once the secondary factor is verified, you will successfully log into the website.

By enrolling into this enhanced login process and logging into this system, you signify your assent to the login process and to the Terms and Conditions made available

Accept the Terms & Conditions

Your one-time PIN number has been emailed to you. Please check your email and enter your PIN below.
(Do not close this window while retrieving your PIN. If you close this window before entering your PIN you will need to request a new PIN.)

[Send a new one-time PIN](#)
If you do not receive a one-time PIN, please contact your administrator.

[Continue Login](#) >

[Disclaimer](#) | [Terms & Conditions](#) | [Privacy Policy](#)

Terms and Conditions screen

STEP 4

Subject: One Time PIN

Dear Client,

A new One Time PIN has been generated to allow you to access your account. The new One Time PIN is 69531. This One Time PIN will expire 20 minutes from the time this email was sent.

Please contact your System Administrator if you have not requested a One Time PIN or need further assistance.

This is a system-generated message. Do not reply to this message.

Example One Time Password email example

STEP 5

The security questions and phone number screen will appear. First, enter your phone number. If you are using a non-U.S. phone number, include the country code, otherwise you can exclude it. Select a phone number type (e.g. Mobile) from the dropdown box.

Then, select a question for each, and input your responses in the space to the right of each question. Responses must contain between 2 and 20 characters, and may not contain special characters. Answers to security questions are not case sensitive.

WELCOME TO PENNSYLVANIA TRUST

Welcome mguopa

Please enter a phone number: ⓘ

Type: Country: Phone Number:

Please select your Security Questions and Answers: ⓘ

Question #1 or Create Custom Question	
Select or enter question #1...	<input type="text" value="Enter answer #1"/>
Question #2 or Create Custom Question	
Select or enter question #2...	<input type="text" value="Enter answer #2"/>
Question #3 or Create Custom Question	
Select or enter question #3...	<input type="text" value="Enter answer #3"/>
Question #4 or Create Custom Question	
Select or enter question #4...	<input type="text" value="Enter answer #4"/>
Question #5 or Create Custom Question	
Select or enter question #5...	<input type="text" value="Enter answer #5"/>

[Continue Login](#) >

Disclaimer | [Terms & Conditions](#) | [Privacy Policy](#)

Security Questions screen

STEP 6

You will be prompted to change your temporary password to a new password. Enter the new password in the first box and confirm the new password in the second box. See the password rules listed below. Passwords are case sensitive.

Passwords must:	Passwords cannot:
<ul style="list-style-type: none">✓ Be a minimum of 8 characters✓ Be a maximum of 20 characters✓ Contain at least one number, one lower case letter, and one upper case letter <p><i>Example of valid password: HappySummer2017</i></p>	<ul style="list-style-type: none">✓ Have more than 2 repeating characters✓ Be the same as the last 5 passwords you used <p><i>Example of invalid password: aaabbb</i></p>

Note: You may register your computer so that you do not have to answer the security questions every time you log in. Only register the computer if it is a personal computer.

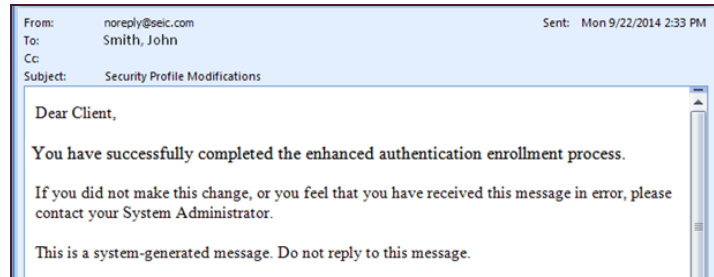
The screenshot shows the 'Change Your Password' screen on the Pennsylvania Trust website. At the top left is the Pennsylvania Trust logo. Below the header, the user is greeted with 'Welcome mguopa'. The main content area contains the instruction 'Please create and confirm your new Password.' followed by two input fields: 'Enter your new Password:' and 'Confirm your new Password:'. A 'Continue Login' button with a right-pointing arrow is located below the input fields. At the bottom of the page, there is a footer with links for 'Disclaimer', 'Terms & Conditions', and 'Privacy Policy'.

Change Your Password screen

STEP 7

The enrollment process is complete and you will be returned to the main Client Access Home screen.

You will receive a notification email that you have successfully completed the authentication process. The website will redirect you back to the log in page to log in.



Sample Enrollment Completion Email

Common Issues

I do not have my Temporary Password.

Please call 877-870-1073 or email helpdesk@penitrust.com and we will be happy to assist you.

I have forgotten my User ID.

Your User ID will be the email address you have registered with Pennsylvania Trust for online Client Access. If you are uncertain, please call 877-870-1073 or email helpdesk@penitrust.com and we will be happy to assist you.

I forgot my password.

Click on the 'Forgot Your Password?' link on the Welcome page. A One Time PIN will be sent to your registered email address. After entering the One Time PIN on the screen, you will be prompted to type in a new password.

I forget the answers to my security questions.

Click on the 'Forgot Your Questions and Answers?' link. You will be prompted to enter your password. After successfully entering the password, a One Time PIN will be sent to your registered email address. After entering the One Time PIN on the screen, you will be prompted to select your security questions and answers.

I have not received the One Time PIN.

You should have received the One Time PIN in the registered email address that Pennsylvania Trust used to set up your User ID; the email would come from 'noreply@seic.com', with "One Time PIN" as the subject. If it is not in your inbox, please also check your junk/spam folder for the email.

If you are unable to find the email with your One Time PIN, please call 877-870-1073 or email helpdesk@penitrust.com and we will be happy to assist you.

I am receiving an “Access Request Denied” error message.

For the security of your account, your access request has been denied.

Your access may have been denied because:

1. You may have clicked on your browser's Forward/Back buttons.
2. You may have clicked on another option or button multiple times.
3. The application may have timed out due to inactivity.

If this problem persists, please try again or contact your System Administrator.

To resolve this message, simply close the web browser completely and reopen to start a new session.

I am getting a session time out message.

Your session has timed out. Please close your browser, and try again.

You may have left the window inactive for too long, or possibly a previous session was not closed completely, leaving behind temporary internet files that became invalid. To resolve, simply close the web browser completely and reopen to start a new session.

I am prompted to answer Security Questions despite having registered my device.

Security Questions are prompted when the website does not recognize the device or browser you are using to log in. This can be due to a compatibility mode setting of your browser or another application causing a conflict. You can try adding the Client Access site to your list of “Trusted Sites.”
