Client Information Portal
New User Security & Sign-On Guide

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Getting Started

1. You will receive an email with a temporary password to set up your account.

For example:

From: FIS Email <idp-noreply@fisglobal.com>
Date: Sun, Feb 23, 2020
Subject: Baird Trust Company: Password Reset
To: <Steve@gmail.com>

Greetings <Client Name>,
Your password has been reset.
New password: **Hj6Mkzm-**
Regards,
Baird Trust Company

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Getting Started

2. Visit bairdtrust.com, click on the Account button. At login, IdP will prompt you to enter your Access ID. After you enter your ID select "Proceed".

It may be helpful to save the Client Information Portal site to your Favorites folder for future use.

Please enter your Access ID and click "Proceed".

* Access ID [   ]

☐ Remember my Access ID

Trouble signing in?   Proceed

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Client Login

3. If your Access ID is Valid***, the Password Text Box will appear for you to enter your <u>temporary</u> password:

Please enter your Access ID and click "Proceed".

Access ID   N▮▮▮▮▮

* Password   [   ]

Trouble signing in?   Cancel   Sign in

***If the user enters an invalid Access ID, IdP will also prompt them for a PIN. But since the user has not yet registered their OTP Device, there is no where for a pin to be sent. The user should select cancel, verify their Access ID and re-try logging in.

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4. You will be prompted to change your password:
*Baird Trust Company requires that your new password must be different from the last 8 previously created passwords.

ⓘ This page allows you to update your password.
The following rules apply when changing passwords:
The new password must contain at least 8 characters.
The new password must be different from the last 16 previously created password or passwords.
The new password cannot contain your Login Name, in forward or reverse order.
The new password cannot contain your first, middle or last name, in forward or reverse order.

* Old Password:

* New Password:

* Confirm New Password:

Cancel   Proceed

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5. You will need to select a OTP method:
If you select "Send a PIN to my phone," you will be prompt to Select "Add a New Device"

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6. A new window will appear where you can name the device and enter in your phone number.
*U.S. phone numbers do not require the Country Code, but the number can start with '+1' as shown below:

Add a New Device ✕

* Device Name: Meggie's Cell

Device Profile: SMS Text ⌄

* Route to Number: +14143351234 ✕

*Format: +(Country Code)(Mobile
Number) e.g.+4489898888888*

Cancel   OK

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7. Once your information is entered, select OK. You will be redirected back to the OTP Selection screen where you can select "Test Device" to request a test text message to be sent to your device.

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8. If you select "Let me use a software app," you will be prompted to choose a "Download mobile app" selection. You will be given options to receive links or use an existing Authenticator App that you have. The link emailed to you is below:

https://login2.fisglobal.com/idp/static-ui/authAppLinks.html

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9. IdP will provide a QR Code which you can load into your Authenticator App to allow for OTPs to be transmitted as needed:

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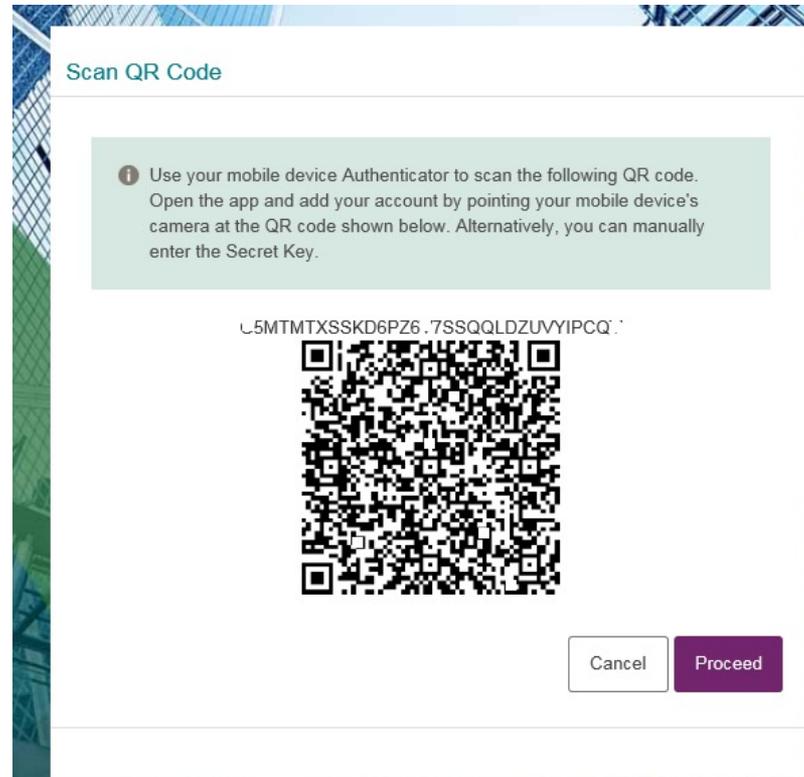
Client Login

10. After the OTP Device has been established, you will be asked if you want to register the device that you are logging into Client Information Portal with (i.e. personal computer, work computer, etc.). Or you can choose to not register the device if it is public. **Select 'Proceed' and you will be logged in.**

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