



SEI Trust Company CIT Dashboard

New User Setup





Table of Contents

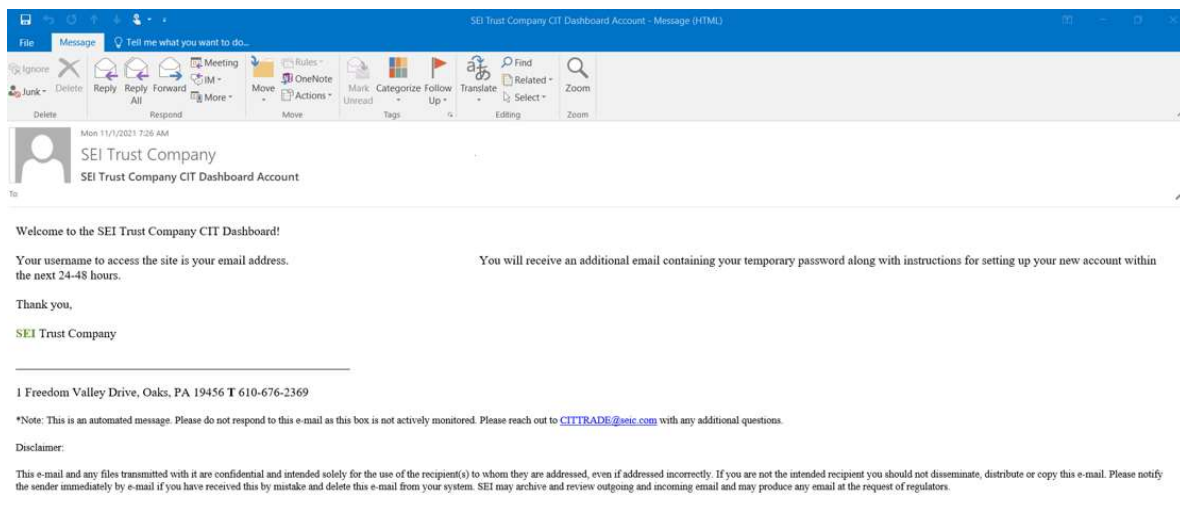
I. NEW USER INITIAL SETUP	3
II. RESETTING YOUR PASSWORD	8
III. UPDATING SECURITY QUESTIONS AND/OR PHONE NUMBER.....	11
IV. TROUBLESHOOTING	14



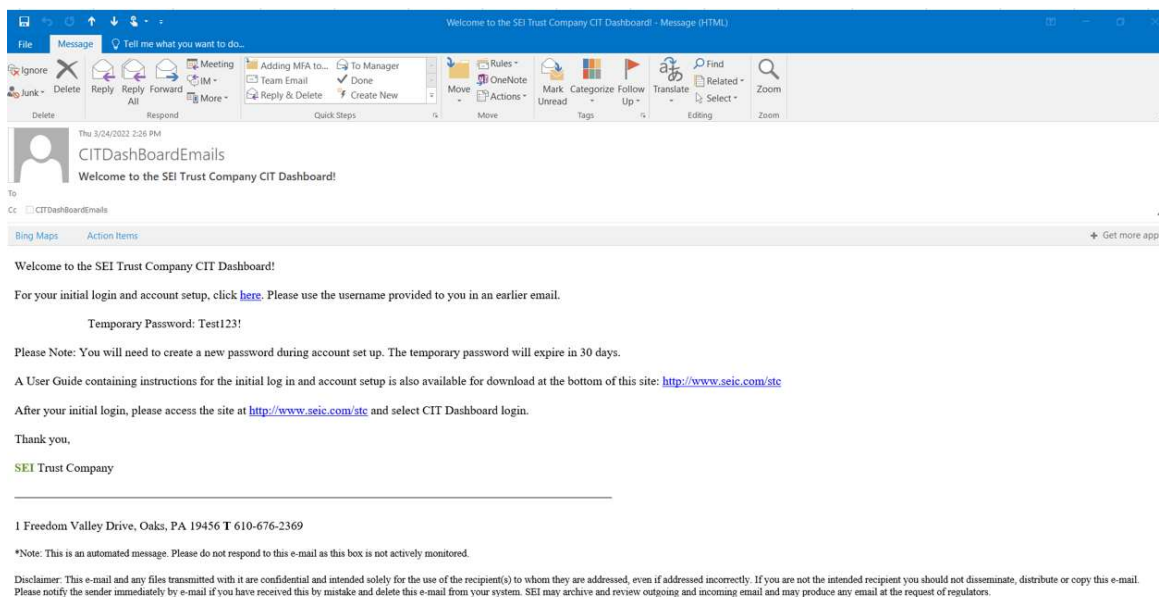
I. New User Initial Setup

New users to the STC CIT Dashboard will receive two Welcome emails:

1. The first email will contain the new username and notes that an additional email containing an initial temporary password will follow within the next 24-48 hours.



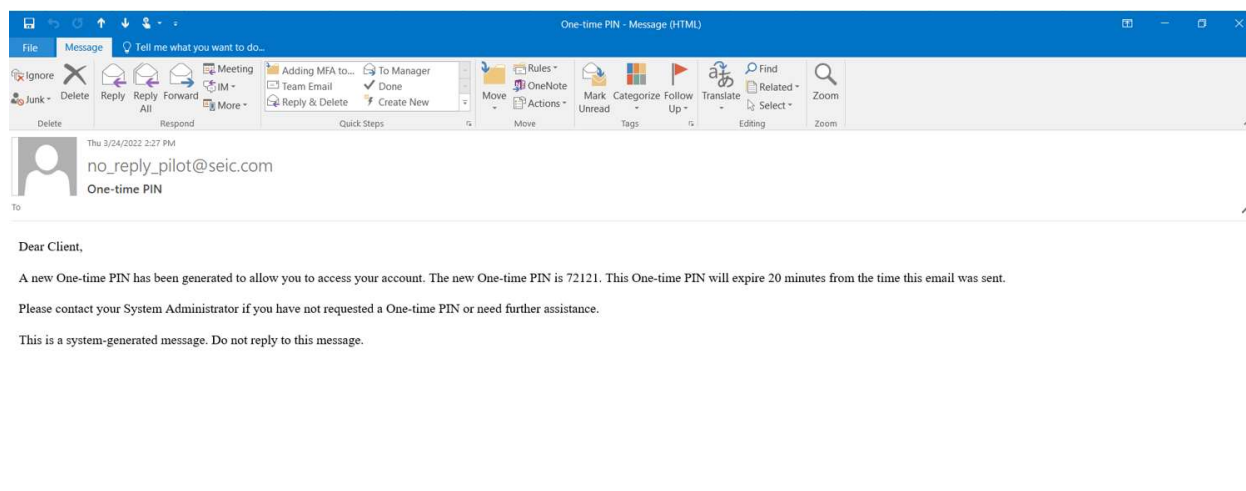
2. The second email will contain the initial temporary password as well as a link to the STC CIT Dashboard.





After clicking the initial login link, the user will be directed to the login page for the STC CIT Dashboard. The user will need to enter the username provided in the first welcome email and the initial temporary password that was provided in the second welcome email and click the *Log In* button.

An email containing a one-time pin will be generated and sent to the user.





The user will enter the one-time pin and click the *Continue Login* button

The screenshot shows the SEI login page. At the top, the SEI logo is on the left, and 'CONTACT US' with a speech bubble icon is on the right. The main heading is 'Welcome'. Below it, a message says 'Enter the one-time PIN that has been emailed to you.' There are two tabs: 'One-Time PIN' (selected) and 'Via Email PIN'. A text input field for the PIN is shown. Below the input field is a checkbox labeled 'I accept the Terms and Conditions of Use and Privacy Policy.' and a 'Continue Login' button with a right arrow. The background is a large image of a modern building at night.

The user will be brought to a screen to enter their phone number and set up security questions and answers.

The screenshot shows the SEI registration page. At the top, the SEI logo is on the left, and 'CONTACT US' with a speech bubble icon is on the right. The main heading is 'Welcome soleary'. Below it, a message says 'Please enter a phone number on which a One-time PIN can be sent.' There are three fields: 'Type:' with a dropdown menu showing 'Mobile', 'Country:' with a dropdown menu showing 'United States', and 'Phone Number:' with a text input field. Below these fields is a message: 'Please select your Security Questions and Answers.' There are five rows, each with a dropdown menu for a question and a text input field for the answer. The questions are: 'Question #1 or Create Custom Question', 'Question #2 or Create Custom Question', 'Question #3 or Create Custom Question', 'Question #4 or Create Custom Question', and 'Question #5 or Create Custom Question'. The answers are: 'Enter answer #1', 'Enter answer #2', 'Enter answer #3', 'Enter answer #4', and 'Enter answer #5'. At the bottom, there is a 'Continue Login' button with a right arrow. The background is a large image of a modern building at night.



Users can choose from pre-defined security questions or choose to create custom security questions using the below criteria.

Security Questions

Security Questions and Answers cannot be repeated. Answers must be between 2 and 20 characters. No special characters are permitted. Questions and Answers must not have exact matching words. Custom Questions must contain at least two words.

After providing phone numbers and setting up security questions and answers, the user will be prompted to create and confirm a new password.

New ways.
New answers.[®]

CONTACT US

Welcome soleary

Please create and confirm your new Password.

Enter your new Password:

SHOW

Confirm your new Password:

SHOW

Continue Login

A wide-angle photograph of a modern, multi-story building at night. The building features large glass windows and a prominent glass-enclosed staircase on the right side. The interior lights are on, and the building is illuminated by streetlights.

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



Users must adhere to the following Password Rules:

Password Rules



Please select your new Password.

- Passwords must be between 8 and 20 characters.
- Passwords must contain at least one number, one upper case character and one lower case character.
- Passwords must have no more than two repeating characters.
- Passwords must not contain User ID.
- Passwords must not contain your first or last name.
- Password must not be the same as any of your last five Passwords.

The user will be granted access to the STC CIT Dashboard upon successful set up of new password.



II. Resetting Your Password

Users can reset their password from the STC CIT Dashboard login page by entering their username and clicking the *Forgot Password* link.

A screenshot of the SEI login page. The header features the SEI logo and the tagline "New ways. New answers." on the left, and a "Contact Us" link with a speech bubble icon on the right. The main content area is titled "Welcome" and contains a login form. The form has a "User ID" field with a single character entered, a "Password" field with a "SHOW" button and an information icon, a "Remember Me" checkbox, and a "Log In" button with a right arrow. A link for "Forgot Password" is positioned above the password field. Below the login form is a link to "Edit Security Profile". At the bottom, a small disclaimer states: "By logging into this system, you signify your assent to our Terms and Conditions of Use and Privacy & Security Policy. If you do not agree to our Terms and Conditions of Use and Privacy & Security Policy, you may not use this system."

The user will be prompted to answer 2 security questions that were previously created during the initial setup.

A screenshot of the SEI security questions page. The header is identical to the login page. The main content area is titled "Welcome" and displays the instruction: "You must correctly answer the following Questions." followed by an information icon. There are two input fields labeled "test question 1" and "test question 5". At the bottom, there is a "Continue Login" button with a right arrow.



The user will need to authenticate their identity by choosing to receive a one-time pin via email or phone number provided during initial setup and click *Continue*.

This screenshot shows the SEI 'Welcome' screen. At the top, the SEI logo and tagline 'New ways. New answers.' are on the left, and a 'Contact Us' link with a speech bubble icon is on the right. The main heading is 'Welcome', followed by the instruction: 'To protect to your account security, please authenticate yourself with one of the verification methods below.' There are two radio button options: 'Email' (selected) and 'Phone'. Under the 'Email' option, it says 'Registered Email: so*****@seic.com' and features a green button labeled 'Get one-time PIN' with a right-pointing arrow. Below the 'Phone' option is a grey button labeled 'Continue' with a right-pointing arrow. The background is a light blue gradient with a faint image of a modern building.

The user will enter the pin that was delivered via email, phone call, or phone SMS message and click *Continue*.

This screenshot shows the SEI 'Welcome' screen after selecting the email verification method. The 'Email' radio button remains selected. A green status message with a checkmark icon reads: 'A one-time PIN was sent to your registered email address.' Below this, there is a text input field labeled 'Enter one-time PIN'. A green button labeled 'Get one-time PIN' with a right-pointing arrow is positioned above the input field. Below the input field, there is a link that says 'Send a new one-time PIN' and a note: 'Contact your System Administrator if you encounter any problems.' The 'Continue' button under the 'Phone' option is still visible at the bottom. The layout and branding are consistent with the previous screenshot.



The user will create a new password and confirm the password before clicking to *Continue Login* button.

The user's new password must adhere to the following password rules:

Password Rules



Please select your new Password.

- Passwords must be between 8 and 20 characters.
- Passwords must contain at least one number, one upper case character and one lower case character.
- Passwords must have no more than two repeating characters.
- Passwords must not contain User ID.
- Passwords must not contain your first or last name.
- Password must not be the same as any of your last five Passwords.



III. Updating Security Questions and/or Phone Number

Users can update their Security Questions and/or phone number from the STC CIT Dashboard login page by entering their User ID and Password and clicking the *Edit Security Profile* link.

The user will need to authenticate their identity by choosing to receive a one-time pin via email or phone number provided during initial setup OR by answering existing security questions.



After the user has been authenticated, the user will click on the Phone Number/Security Questions button.

SEI New ways. New answers. Contact Us

Welcome

To update your profile, select the link for the information you want to change. Click Done to proceed.

Phone Number / Security Questions

Password

☐ Remember Me

Done

The user will be able to edit an existing phone number and/or edit existing security questions and answers. Once all necessary changes have been made, the user will click the update button to continue.

SEI New ways. New answers. Contact Us

Welcome

Please enter a phone number on which a One-time PIN can be sent.

Type: Mobile Country: United States Enter Number: Phone Number

Please select your Security Questions and Answers.

Question #1 or Create Custom Question

Select or enter question #1... Enter answer #1

Question #2 or Create Custom Question

Select or enter question #2... Enter answer #2

Question #3 or Create Custom Question

Select or enter question #3... Enter answer #3

Question #4 or Create Custom Question

Select or enter question #4... Enter answer #4


Question #5 or Create Custom Question

Select or enter question #5... Enter answer #5

Update Cancel



The user must adhere to the Security Questions Criteria noted below:

Security Questions

Security Questions and Answers cannot be repeated. Answers must be between 2 and 20 characters. No special characters are permitted. Questions and Answers must not have exact matching words. Custom Questions must contain at least two words.



IV. Troubleshooting

Contact Information

For all issues with password resets, suspended accounts, or locked accounts, please contact the SEI Service Desk for assistance by calling (610)-676-2369 and choosing menu option #2.

For all other inquiries, please contact CITTRADE@seic.com or call (610)-676-2369 and choose menu option #3.