

Unified Identity Service (UIS) Migration Information

Migration Dates

Now through May 30, 2025

- Monday – Friday
- 8:00 a.m. – 6:00 p.m. Central Time

Blackout dates

March 3 – March 21, 2025 (pausing to accommodate the ISO20022 Migration of March 10, 2025)

Migration Milestones	JH	FI
Migration Date submitted via Support case		•
UIS setup and configuration process	•	
Open ticket w/ Intuit for QBO changes min. of 30 days prior to migration		•
Communication to Treasury Management customers		•
Notes placed in the case 14 & 7 days prior to confirm migration date	•	
Note placed in the case day prior with request for enrollment email timing	•	
Add case note to indicate what time enrollment emails should be sent		•
Note placed in the case to confirm migration is complete and emails sent	•	

Migration details

The Jack Henry team will handle all aspects of your migration to UIS, including

- setup and configuration
- migration email distribution (emails are sent from the same address used for TM invites today)

On the migration date, after UIS has been enabled for your bank, your users will receive an email with a link to create a Digital ID. At that time, they will not be able to access Treasury Management until they take action as outlined in the email. As a reminder, UIS only impacts the login to Treasury Management and does not change anything about the Treasury application itself, including two-factor challenges for high-risk actions. Review the [UIS FAQ](#) for details on how UIS works for your users.

Important timing details

Please be sure to communicate these details to your users ahead of the migration to UIS. We recommend communicating at regular intervals leading up to the change in login flow.

You can use [Banner and Modal messages](#), place a document in the Resources widget, or email your users regarding these changes, which require prompt action on their part. There are also free UIS campaign materials in the JH Resource Center.

- The link in the enrollment email is valid for **7 days**. If enrollment is not completed before the link expires, bank personnel will have to resend an enrollment email from Treasury Back Office. Company administrators cannot resend enrollment links.
- Once the link is clicked, the user has **45 minutes** to complete the enrollment process. If the user clicks the link and walks away and the time expires, bank personnel will have to resend an enrollment email from Treasury Back Office. Company administrators cannot resend enrollment links.

Post-Migration Support

The case will be closed upon adding the 'Migration Complete' case note. For any migration or UIS issues, please open a new case so that our Support teams will be notified immediately. As usual, please provide as many details as possible.

Digital Identity Management

Company Administrators will be able to send Password Reset emails to users needing assistance with passwords. The remainder of Identity management will take place in the Identity app within Banno People and can only be accessed by bank personnel. Please review the UIS Support Guide for more information.

Bank Website information

The link/URL for Treasury Management does not change when UIS is enabled, therefore changes to your website are not necessary. With UIS, when a user clicks to access Treasury Management from your website, there will be an immediate redirect to the UIS login page. Once the user logs in and authenticates, they will be directed back to the Treasury site and your existing TM URL will show in the browser's address bar.

Third-party integrations

To increase application access security and reduce fraud, JH Digital Banking has made explicit and purposeful moves to not allow screen scraping by third parties, and not allow access from automated services that access online channels appearing as a bot. Banks moving to Treasury Management with UIS from NetTeller Cash Management will experience disruption to any services that may have previously worked outside of the UIS authentication framework.

Review the JHA Treasury Management – Intuit QBO Connectivity for UIS guide for more information regarding Express Web Connect aggregations services with Unified Identity Service. Intuit requires a ticket be opened by the bank a minimum of 30 days prior to your UIS migration.