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Accessing the Client Portal

This topic was last updated on April 2, 2021.

First Login

When a [Client Portal User](#) account has been added for you, you may receive either an e-mail or a letter, depending on how your client portal user record was created. For example, you may receive an e-mail similar to the one below where the Subject is "Special Message Regarding Your Online Portal Access" and the "To set up your online account and create a password" link will be valid until the "expire on" date.

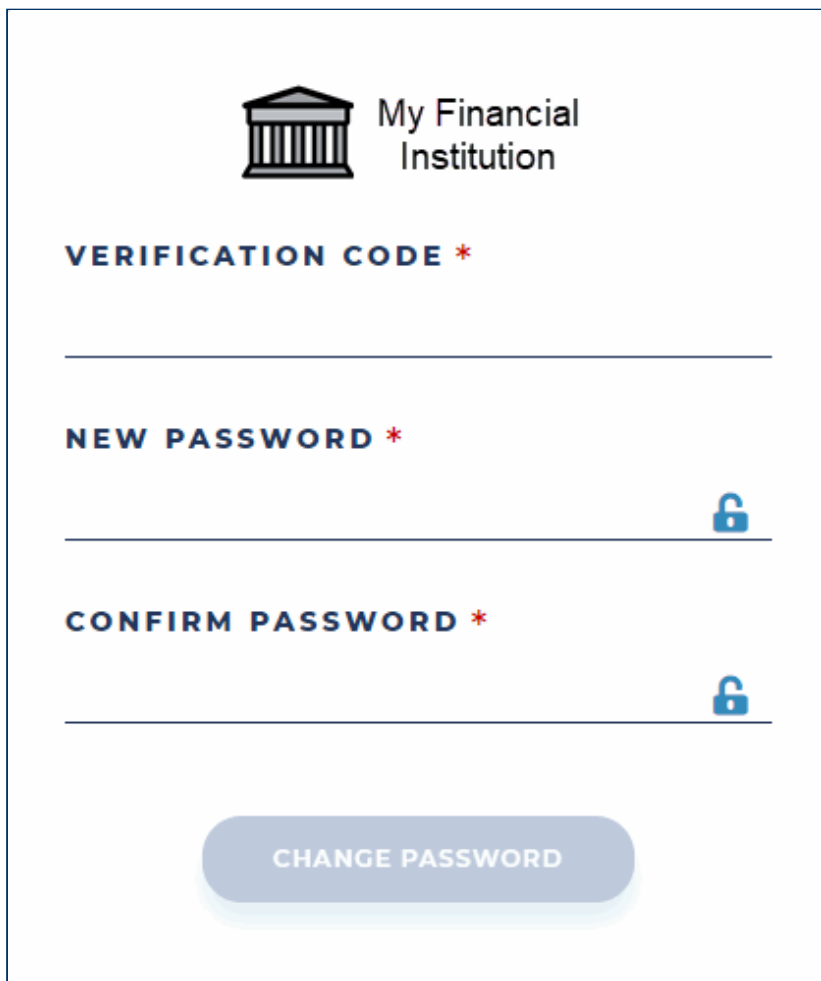
A screenshot of an email interface. The subject line is "Special Message Regarding Your Online Portal Access". Below the subject line is a tab labeled "Inbox x". The sender is "noreply@bakerhillprod.net via sendgrid.net" and the time is "8:18 AM (1 minute ago)". The recipient's name is masked. The email body contains a congratulatory message for Evelyn Eudy, providing instructions on how to set up an online account and create a password. It includes a link "here" and a verification code "gdpsrx". It also lists supported web browsers: Google Chrome, Microsoft Edge, and Apple Safari. The email concludes with contact information for Customer Service: "customerservice@myfinancialinstitution.com" and "(800) 800-8000 ext. 800".


The e-mail address has been masked in the screen shot for security reasons.

If you received an e-mail, follow these steps to access and login to the Client Portal for the first time:


1. Per the e-mail instructions, click "**here**" to setup your Client Portal account and change your password, which will be used to login to the Client Portal.


An internet browser will be launched and take you to this dialog, where the logo displayed will be the logo of the financial institution who sent you the request:



 My Financial Institution

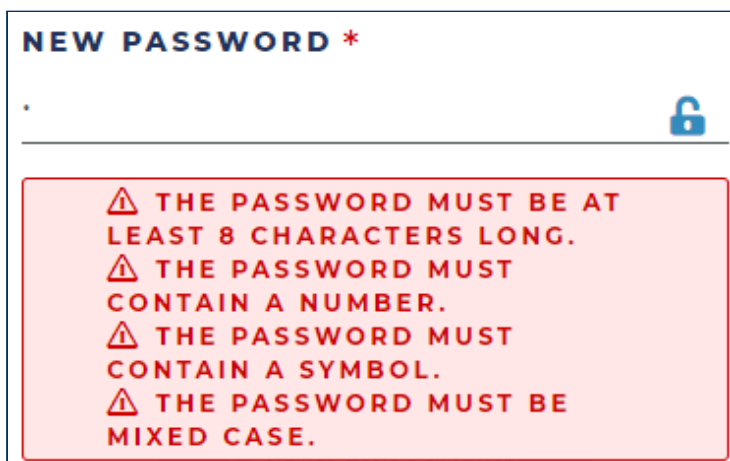
VERIFICATION CODE *

NEW PASSWORD * 

CONFIRM PASSWORD * 


CHANGE PASSWORD


2. Enter the **Verification Code** contained in the e-mail you received.
3. Enter a password you will remember in both the **New Password** and **Confirm Password** fields. As you begin to type in your password, which will be masked, the requirements of the password will be displayed.





NEW PASSWORD *


.



 THE PASSWORD MUST BE AT LEAST 8 CHARACTERS LONG.

 THE PASSWORD MUST CONTAIN A NUMBER.

 THE PASSWORD MUST CONTAIN A SYMBOL.

 THE PASSWORD MUST BE MIXED CASE.

The Change Password button will enable.

4. Click the **Change Password** button.

The internet browser will refresh to display the Login page. It is strongly recommended you bookmark this page (if you have not done so already) in order to navigate to it in the future.



My Financial
Institution

USER NAME

PASSWORD



LOGIN

[FORGOT PASSWORD?](#)

The [Forgot Password?](#) link will only display if the financial institution has enabled self-service password reset functionality. Reference the [Forgot Password](#) topic for details.

5. Enter your **User Name**, which is the e-mail address used to receive the e-mail. What you enter is not case-sensitive.
6. Enter your **Password**, which will be masked.
7. Click the **Login** button.

If the financial institution who sent you the request has enabled Multi-Factor Authentication as an additional level of security for your data, you must register the device.



My Financial
Institution

You are logging in from an unrecognized device.
You will receive an e-mail containing a Code within the
next few minutes.

If you do not receive your Code within next 10-15 minutes,
make sure to check your junk and spam e-mail folders in
case your computer security permissions have not
allowed for normal delivery of our e-mail messages to
you. If you still cannot locate our e-mail with your Code
included, please contact My Financial Institution
Customer Service at 1-800-000-0000.



Your device is not registered.

OK

USER NAME *

PASSWORD *



CODE *



REMEMBER THIS DEVICE?

LOGIN

8. Click the **OK** button.

The instructions for registering your device will be displayed, where the name and phone number of the financial institution will be on the last two lines.



My Financial
Institution

You are logging in from an unrecognized device.
You will receive an e-mail containing a Code within the
next few minutes.

If you do not receive your Code within next 10-15 minutes,
make sure to check your junk and spam e-mail folders in
case your computer security permissions have not
allowed for normal delivery of our e-mail messages to
you. If you still cannot locate our e-mail with your Code
included, please contact My Financial Institution
Customer Service for assistance at (800) 800-8000.

USER NAME *

PASSWORD *



CODE *



REMEMBER THIS DEVICE?

LOGIN

Here is an example of the e-mail you will receive:


Your Requested Online Identification Code



To



11:54 AM

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Note: This is a service message regarding the Identification Code you requested.

Dear [redacted],

Here is the Identification Code you requested from us to authenticate your access request.

Your Identification Code is: SkKwyP

This code will expire in 30 minutes. Please enter the code in the appropriate field online as soon as possible.

If you did not request this code, please contact us immediately at the number below. Please do not reply to this email. It is delivered automatically and the inbox is not monitored.

Thank you,

Sincerely,

My Financial Institution Customer Service

customerservice@myfinancialinstitution.com

(800) 800-8000

The Identification Code will be valid for 30 minutes.

9. Enter your **User Name**, which is the e-mail address used to receive the e-mail above. What you enter is not case-sensitive.
10. Enter your **Password**, which will be masked.
11. Enter the Identification **Code** contained in the e-mail you received.
12. Leave the **Remember This Device?** checkbox selected so the Client Portal will register your device.
13. Click the **Login** button.

You will be taken into the Client Portal. Keep these two things in mind:

- If you have an SBA Paycheck Protection Program (PPP) loan with the financial institution and you have not started a Forgiveness application for that loan, the Loan Forgiveness Application dialog will display:

Loan Forgiveness Application ✕

Welcome, you are the contact of at least one business with a SBA PPP Loan.

To apply for forgiveness of your Paycheck Protection Program (PPP) loan you can fill out an online application.

To get started with an online application select a business below.

FOUR WINDS CASINO SOUTH BEND

TROPICAL TREATS

MAYBE LATER

- Onboarding tutorials might display, depending on if the financial institution configured them to display. Below are screen shots of each of the four tutorials you would see; click either the **Skip** button to close the tutorial or the **Continue** button to go to the next tutorial. The tutorials will not display again.

WELCOME



Thanks for creating your client portal account! Click here to get to know the newest way to engage with My Financial Institution.

SKIP

CONTINUE



Messages



Have a question for My Financial Institution? Send and receive messages from your financial institution representative about your credit request.

SKIP

CONTINUE



Documents



Upload new or select previously uploaded documents requested from My Financial Institution as part of the credit request process.

SKIP

CONTINUE



Get Started!



You are ready to get started!
Select below what you would like to do
next?

Review Active Action
Items

Send Message

Invite Business
Partners

SKIP



The buttons available on the Get Started tutorial will change based on your client portal permissions.

You will then be taken to your Home page, where the logo (at the top, left of the page) and the copyright (at the bottom, left of the page) will reflect the logo and name of the financial institution who sent you the request; the financial institution may have included other items in the footer of the page. What you are allowed to do in the Client Portal depends on the security permissions configured for your account by the financial institution. Reference the [Client Portal Home Page](#) topic for details on the Home page.



Welcome, Angela Eikenbary
Eikenbary Testing LLC

 Action Center

You have no active to do items!



Subsequent Logins

To login to the Client Portal after the first login:

1. Launch a supported internet browser and navigate to the Login page (what you should have bookmarked in the steps above).



My Financial
Institution

USER NAME

PASSWORD



LOGIN

[FORGOT PASSWORD?](#)

2. Enter your **User Name**, which is the e-mail address configured with your client portal user account. What you enter is not case-sensitive.
3. Enter your **Password**.
4. Click the **Login** button.

You will be taken into the Client Portal. Keep this in mind:

- If you have an SBA Paycheck Protection Program (PPP) loan with the financial institution and you have not started a Forgiveness application for that loan, the Loan Forgiveness Application dialog will display:

Loan Forgiveness Application ✕

Welcome, you are the contact of at least one business with a SBA PPP Loan.

To apply for forgiveness of your Paycheck Protection Program (PPP) loan you can fill out an online application.

To get started with an online application select a business below.

FOUR WINDS CASINO SOUTH BEND

TROPICAL TREATS

MAYBE LATER

Password Expiration

Your password will expire after a specific number of days as configured by the financial institution. Prior to the password expiration, a password expiration warning message will begin to display as you login to the Client Portal.

Your password will expire in 2 day(s). Please update your password before it expires. Click [here](#) to update your password.


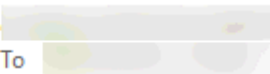
OK


Be sure to change your password prior to its expiration. Steps to change your password may be found in the [Client Portal User Name Menu](#) topic.


Forced Password Change

If the financial institution you have a client portal user account needs to reset your password, you will receive an e-mail similar to this where the link in the e-mail will be valid for 48 hours:


Important Message from My Financial Institution

 To  2:01 PM



 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Note: This is a service message regarding your login account for My Financial Institution.

Dear ,

Please do not reply to this email. This is an automated email and the inbox is not monitored.

A password reset has been requested. Click [here](#) to reset your password.

Please enter verification code PTgVsi when resetting your password.

Sincerely,
My Financial Institution Customer Service
customerservice@myfinancialinstitution.com
(800) 800-8000

Names and e-mail addresses have been masked in the screen shot for security reasons.

1. Per the e-mail instructions, click "**here**" to reset your password.
2. Follow the steps in the **First Login** section above starting with **Step 2**.

Account Lockout

You will get locked out of the Client Portal due to the following:

- **Password expiration:** You did not change your password before it expired.
- **Consecutive unsuccessful login attempts:** You tried logging in with the correct E-mail but incorrect Password so many consecutive times that your account has become locked for security reasons.
- **Inactivity:** You have not logged in to the Client Portal within a certain amount of days so your account has become locked for security reasons.

If you are locked out due to consecutive unsuccessful login attempts, you will receive an e-mail similar to this:


My Financial Institution Client Portal Invalid Credentials



To



2:16 PM

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Note: This is a service message regarding your login account for My Financial Institution client portal.

Dear [redacted],

Failed attempts to login with a valid username, valid password, but the account is locked (too many attempts).

Please do not reply to this email. It is delivered automatically and the inbox is not monitored.

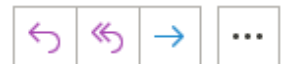
Thank you,
My Financial Institution Customer Service
customerservice@myfinancialinstitution.com
(800) 800-8000

Contact the financial institution so they may unlock your account. Once they've done that, you will receive an e-mail similar to this:


Important Message from My Financial Institution



To



1:59 PM

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Note: This is a service message regarding your login account for My Financial Institution.

Dear [redacted],

Please do not reply to this email. This is an automated email and the inbox is not monitored.

Your account has been unlocked. You will be required to change your password upon your next login.

Sincerely,
My Financial Institution Customer Service
customerservice@myfinancialinstitution.com
(800) 800-8000

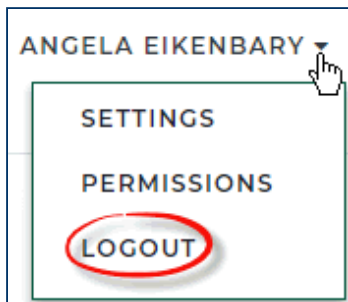
Names and e-mail addresses have been masked in the screen shot for security reasons.

If your account was unlocked without your password being reset, you will not need to change your password upon your next login.

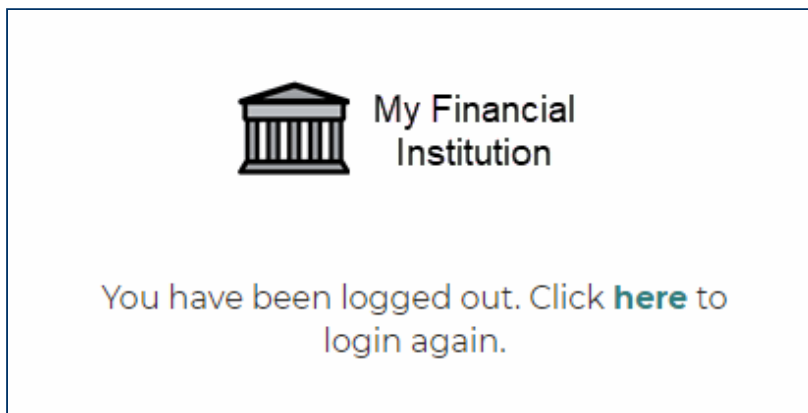
Logout

To log out of the Client Portal:

1. In the upper, right corner of the Home page, select your **name**.
2. In the options menu, select **Logout**.



The following dialog will be displayed in the internet browser:



Either click **here** or use the bookmark you saved earlier to navigate to the Login page.

Automatic Logout

If after logging in to the Client Portal, you remain idle (i.e., you do not navigate through the portal nor use its functionality), you will be automatically logged out after the time period configured by the financial institution's administrator.

