

# PARTICIPANT ACCOUNT (MEMBER SELF-SERVICE) OR MSS *Registration* TUTORIAL

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## Summary

Participant Account is an option UFCW provides to their members to view and update their demographic information, complete an enrollment, add/remove dependents, review health claims, pension history, and to share information with the fund office using secure messaging and document uploads.

Members can register for an account from the UFCW Trust website. This tutorial provides the step-by-step instructions for **registering** for an account.

## Before You Begin

Before you can create an account, you need to be a Member of the TFO, or a Spouse/Domestic Partner of a TFO Member. You will also need the following information:

- Social Security Number OR your Member ID
- First and Last Name (as it appears in our records)
- Date of Birth
- Internet access (mobile, tablet or desktop access, data rates may apply based on your device)
- Web Browser to access the UFCW Trust website (we recommend Google Chrome, Safari, or Microsoft Edge)

### To access the Login page:

1. Open your web browser and go to [www.ufcwtrust.com](http://www.ufcwtrust.com). The following page is displayed.
2. Select **Access Your Account > Participant Login**.

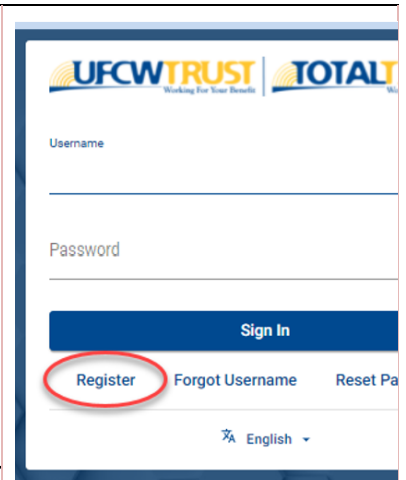
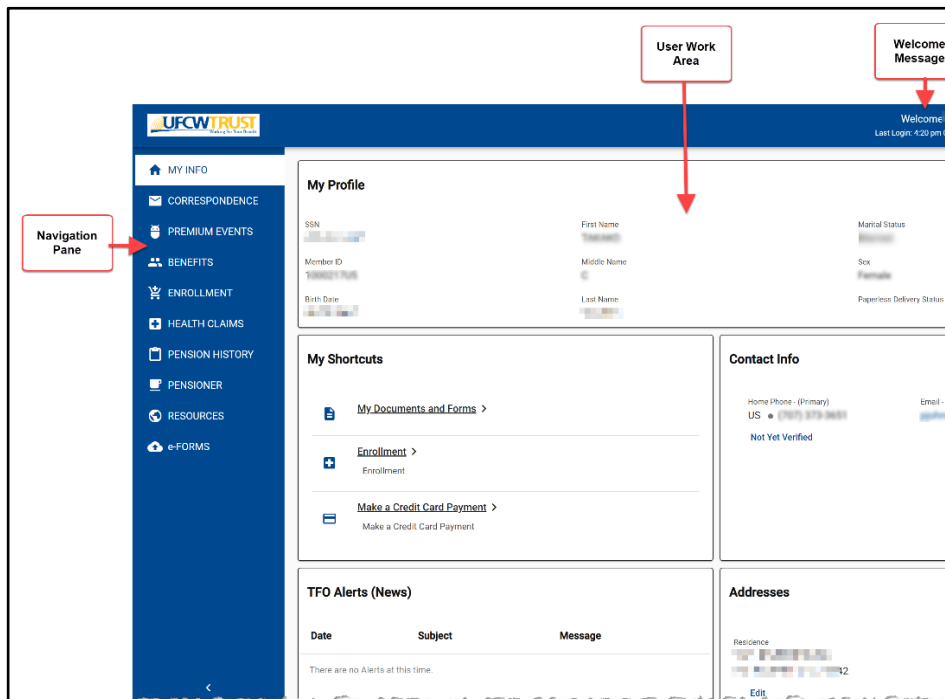


- From the bottom of the Login screen, click **Register**.  
The Account Setup page is displayed.

## Continue to About the Participant Account Interface

When you sign in to the Participant Account portal, you will be presented with the user interface. The options displayed, and the available features depend on the role you are assigned.

An example of the interface is shown in the image below.

Refer to the table below for the definitions of each section of the Participant Account interface.

<b>Navigation Pane</b>	Use the navigation page to access a specific tab.
<b>Tabs</b>	When you select an option from the navigation pane, you are opening the tab for that option. The tab hold that is active is highlighted in white in the navigation pane.
<b>User Work Area</b>	The work area is where you perform tasks, access information, upload documents, and more.

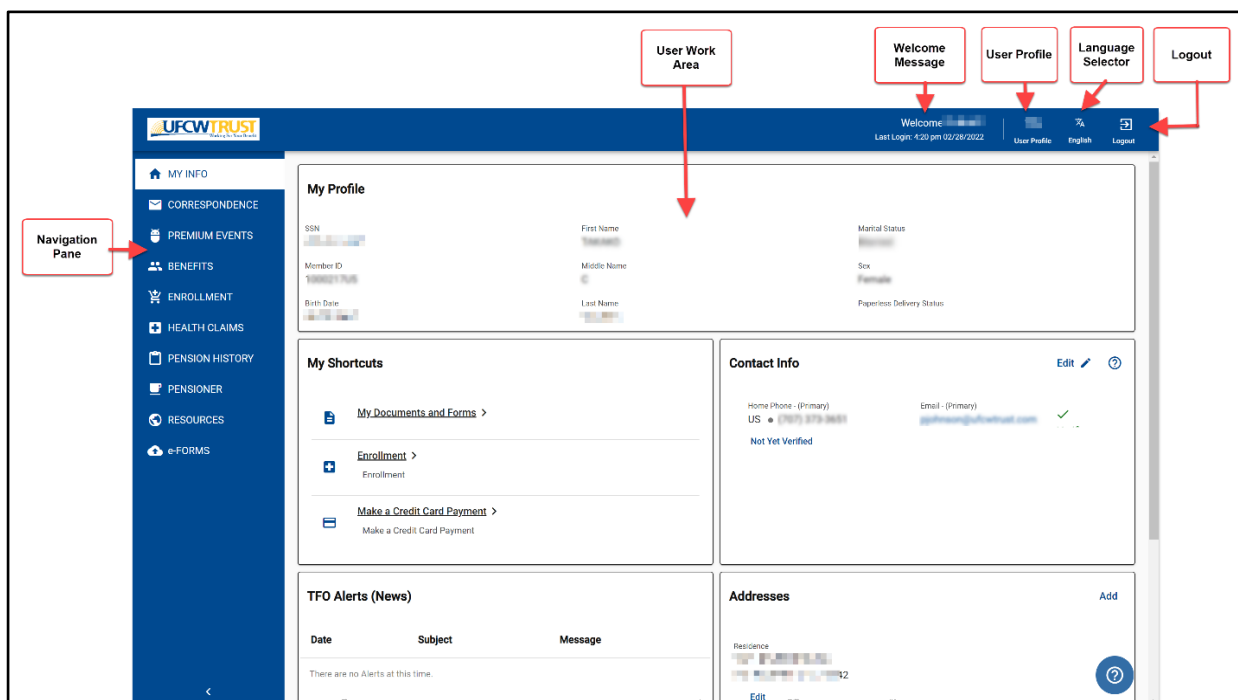
<b>Widgets</b>	Widgets are the individual sections on the tabs. For instance, in the example above, you can see that the My Info tab is showing 5 different widgets: My Profile, My Shortcuts, My Contact Info, TFO Alerts, and Addresses.	
<b>Welcome Message</b>	The Welcome Message displays your first name, and indicates the last time and date you signed in to MSS.	
<b>User Profile</b>	The User Profile provides the option to change your username, security questions, and more. From the User Profile option, you can also select the About option, which displays the MSS application version information.	
<b>Language Selector</b>	Allows you to change the language presented in the user interface. This feature is currently not available.	
<b>Logout</b>	Closes the application and returns you to the Login screen.	

4. Register Your Account below.

## About the Participant Account Interface

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## Register Your Account

There are three steps that you need to complete to register for an account:

1) <a href="#">Account Setup</a>	In the first step, the Account Setup wizard (a wizard is a step-by-step process that allows users to input information in a prescribed order and in which subsequent steps may depend on information entered in previous ones) you will begin by accepting the terms and conditions, then you will enter personal identification data, setup security questions, and complete the two-factor authentication process. Two-factor authentication is critical for your security. We recommend always authenticating each of your phone numbers and email addresses provided within your account.
2) <a href="#">First Time Sign In Info</a>	Once you have set up an account, you are brought to the First Time Sign In Info wizard, where you will review and edit (if needed) your address, contact information, and notification preferences.
3) <a href="#">Verify Phone Number and</a>	The final step to completing the registration process is to verify your email and phone number(s). This step is required if at any time you need help remembering your username or need to reset your password.

## Account Setup

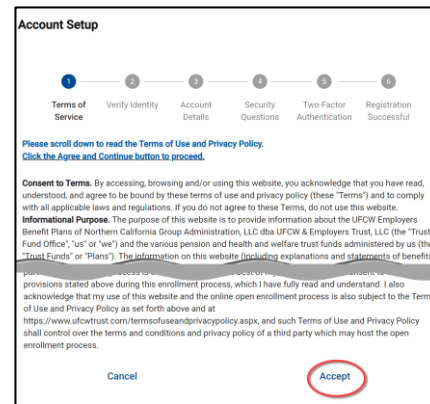
This section provides the instructions for creating an account. The **Account Setup wizard** is where you will create your username and password, set up security questions, and complete the two-factor authentication process.

### Terms of Use and Privacy Policy

Before you can create an account, you need to agree to the **Terms of Use and Privacy Policy**.

#### To complete this step:

1. Read the **Terms of Use and Privacy Policy**.
2. At the bottom of the page, click **Accept** to continue, or **Cancel** to close the page without creating an account.



### Verify Identity

For the **Verify Identity** step, you need to indicate whether you are registering as a **Member** or as a **Spouse/Domestic Partner**, then provide your personal identification data.

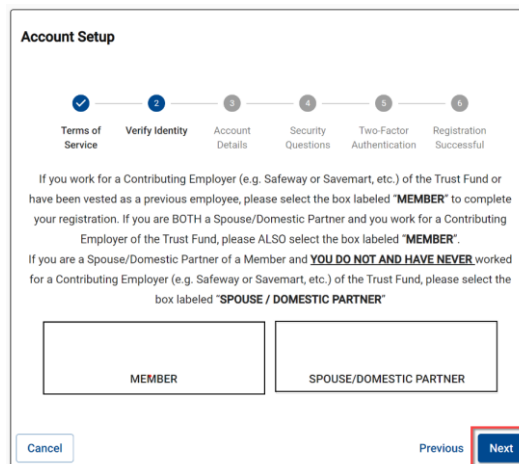
**NOTE:** The Spouse/Domestic Partner option can only be used to register if you have never, at any time, been a Member.

#### To complete this step:

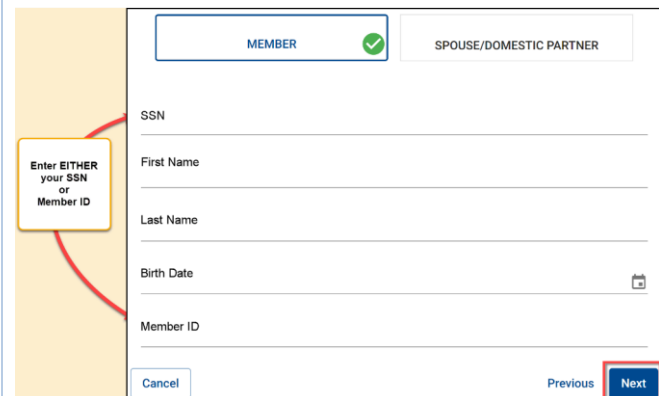
1. Select either **Member** or **Spouse/Domestic Partner**.

Once you make your selection, the page expands, and you are prompted to enter your identification details.

The details you enter must match the data in our system. Be sure there are no unwanted spaces within your entries.



2. Enter your **Social Security Number** (SSN), or if you prefer, enter your Member ID field at the bottom.
3. Enter your **First Name**.
4. Enter your **Last Name**.
5. Next, enter your **Birth Date**.
6. If you did not enter your SSN, you need to enter your **Member ID**.
7. When you complete all required fields, click **Next**.  
You are brought to the **Account Details** tab.



**HINT:** You only need to enter your SSN **or** your Member ID. Both are not required. For instance, if you enter your SSN, you do not need to enter your Member ID.

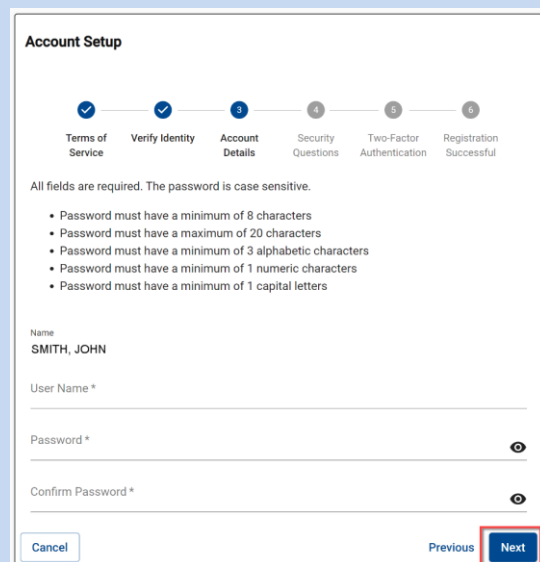
The information you enter must match the Trust Fund Office (TFO) records.

## Account Details

The Account Details step is used to create a unique user ID and a secure password. Follow the instructions on the screen for the password rules.

### To complete this step:

1. Create a unique username and enter it in the **User Name** field. Your username can be changed at a later time, if you like.
2. Create and enter a secure **Password**. Refer to the password rules on this page.
3. Click **Next**. The Security Questions step is displayed.

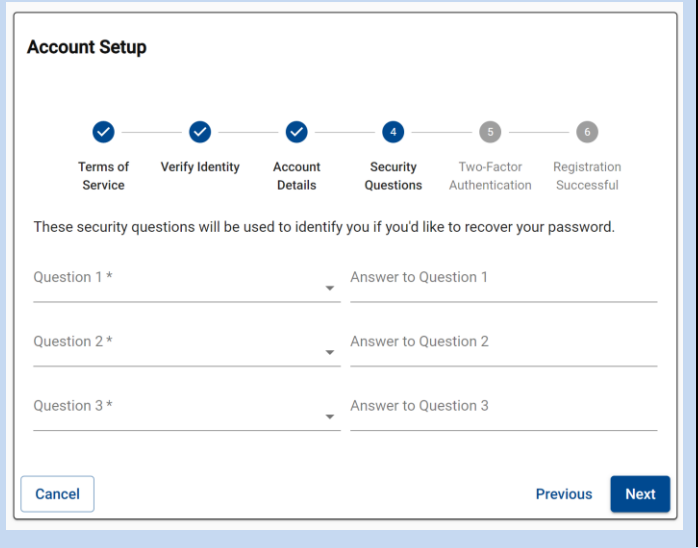


## Security Questions

On the **Security Questions** tab, you need to select three separate questions and provide your answers. Be sure to select questions for which you will easily remember the answer.

### To complete this step:

1. Click in the **Question 1** field. You are presented with a dropdown list of questions.
2. Select a question.
3. In the **Answer to Question 1** field, enter your answer.
4. Repeat these steps for **Question 2** and **Question 3**.
5. Click **Next**.  
Your security info is updated. When needed, you will use the security questions to verify your identity.



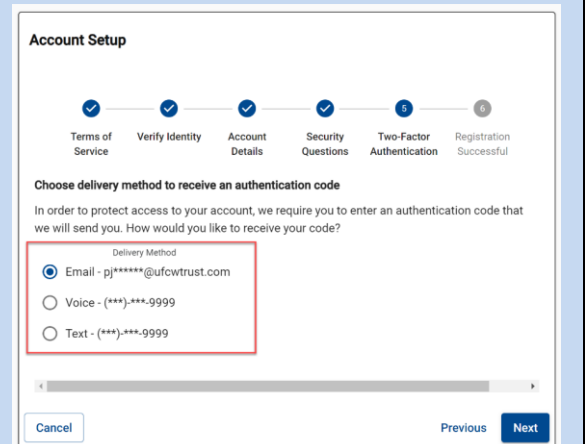
The screenshot shows the 'Account Setup' progress bar with six steps: Terms of Service, Verify Identity, Account Details, Security Questions (current step), Two-Factor Authentication, and Registration Successful. Below the progress bar, a message states: 'These security questions will be used to identify you if you'd like to recover your password.' There are three rows for questions, each with a dropdown menu for the question and a text field for the answer. The buttons 'Cancel', 'Previous', and 'Next' are at the bottom.

## Two-Factor Authentication

In order to protect your account, we need to send you an authentication code. On the **Two-Factor Authentication** tab, you need to indicate the method in which you want to receive your authentication code. Such as: email, voice (phone call), or text message (data rates may apply).

### To complete this step:

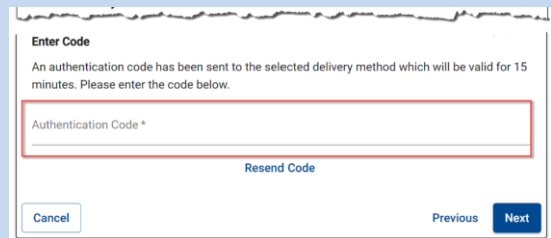
1. Select your **delivery method**. The system will send you an authentication code to the method you choose here.  
Once you make your selection, the page expands and now displays the **Authentication Code** field.
2. If you choose Voice, you will get an automated phone call, which will provide the code. Otherwise, check your text messages or email to get the authentication code.
3. If you do not have access to the phone numbers or email address listed in this step, you will need to contact the Trust Fund Office directly to update your contact information in our system. Please call (800) 552-2400.



The screenshot shows the 'Account Setup' progress bar with six steps: Terms of Service, Verify Identity, Account Details, Security Questions, Two-Factor Authentication (current step), and Registration Successful. Below the progress bar, a message states: 'Choose delivery method to receive an authentication code. In order to protect access to your account, we require you to enter an authentication code that we will send you. How would you like to receive your code?' There are three radio button options: 'Email - pj\*\*\*\*\*@ufcwtrust.com' (selected), 'Voice - (\*\*\*)-\*\*\*-9999', and 'Text - (\*\*\*)-\*\*\*-9999'. A red box highlights the 'Email' option. The buttons 'Cancel', 'Previous', and 'Next' are at the bottom.



4. Enter the **authentication code** in the provided field.  
**Note:** If you do not receive an authentication code, click **Resend Code**.
5. Click **Next**.

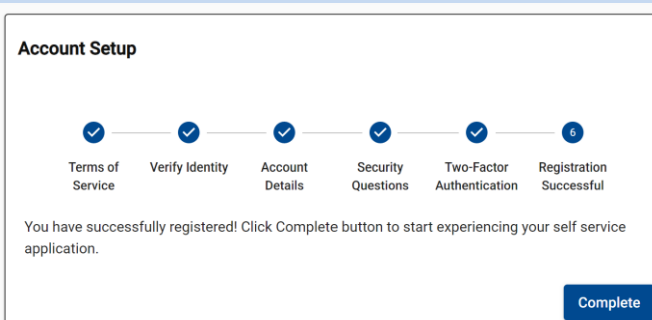


### *Registration Successful*

After you enter the authentication code and click **Next**, you are brought to the Registration Completion page.

#### **To complete this step:**

1. Click **Complete**.  
You have successfully created an account.
2. You now need to complete the First Time Sign In steps. Continue to the next page for instructions.



## First Time Sign In Info

After completing the Account Setup steps, you are brought to the **First Time Sign In Info wizard**, where you will review and edit (if needed) your address, contact information, and notification preferences.

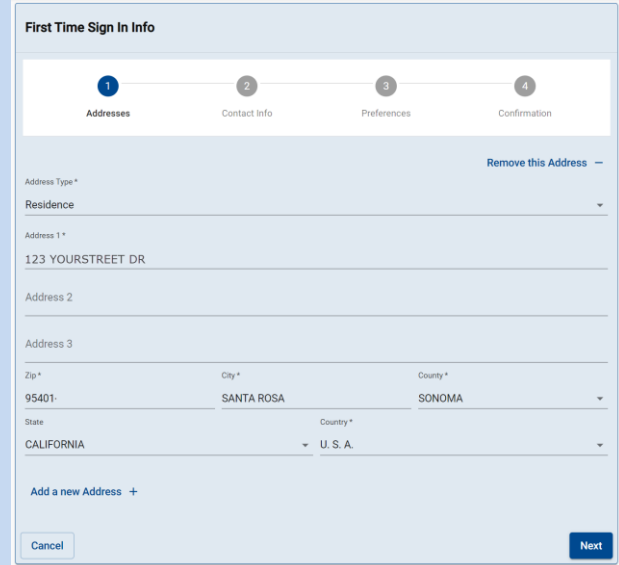
### To complete the Addresses step:

1. Review the address information on this page for accuracy.
2. Make any necessary edits.
3. If needed, you can click **Add a new Address**, and enter an additional address. You must supply at least one address.

**HINT:** Upon entering an accurate zip code, the city, county and state will automatically populate for you.

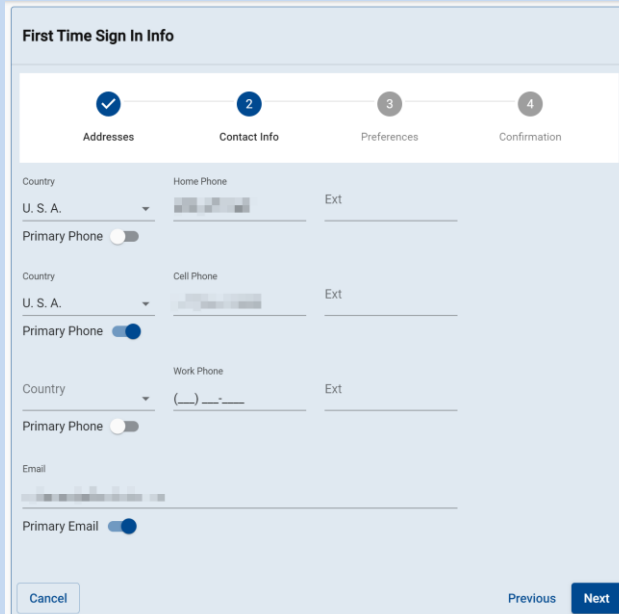
**HINT:** A residence address type can be your physical and mailing address. A correspondence address type is a mailing address only such as a P.O. Box.

4. Click **Next**.



### To complete the Contact Info step:

1. Review the Home, Cell, and Work numbers.
2. Make changes where needed.
3. Use the Primary Phone slider [Primary Phone ☒] under the correct phone type to indicate which phone is your primary phone.
4. Ensure the correct email address is shown, and that it is set as the Primary Email.
5. Click **Next**.



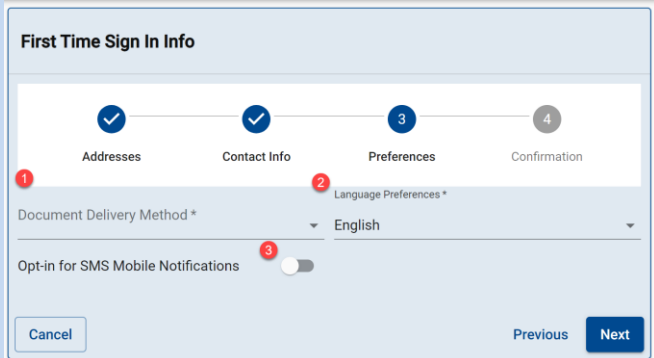
### To complete the Preferences step:

1. Indicate how you want to receive correspondence from the TFO. Click in the **Document Delivery Method** field, select *Paperless* or *Mail*. By selecting paperless, you understand your benefit information will not be mailed to your postal address.
2. Click in the **Language Preferences** field and select your preferred language.
3. If you want to opt-in for **SMS Mobile Notifications**, click the slider to the right. We will send you important text message reminders (data rates may apply.)

### Confirmation

1. Review and ensure the data displayed is correct.
2. If you need to make changes, use the **Previous** button.
3. Otherwise, click **Confirm**.  
You are then brought to your account.

Next you need to verify your phone number and email address. Continue to the next page for instructions.



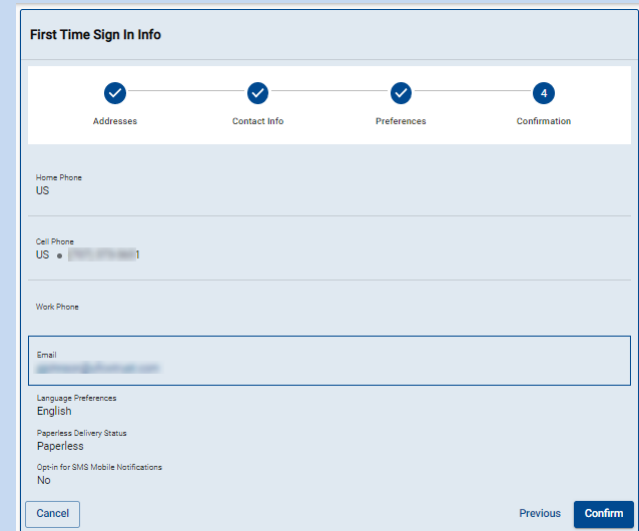
**First Time Sign In Info**

Progress: 1. Addresses (checked), 2. Contact Info (checked), 3. Preferences (active), 4. Confirmation

Document Delivery Method \* Language Preferences \* English

Opt-in for SMS Mobile Notifications ☐

[Cancel](#) [Previous](#) [Next](#)



**First Time Sign In Info**

Progress: 1. Addresses (checked), 2. Contact Info (checked), 3. Preferences (checked), 4. Confirmation (active)

Home Phone  
US

Cell Phone  
US • [redacted]

Work Phone

Email  
[redacted]

Language Preferences  
English

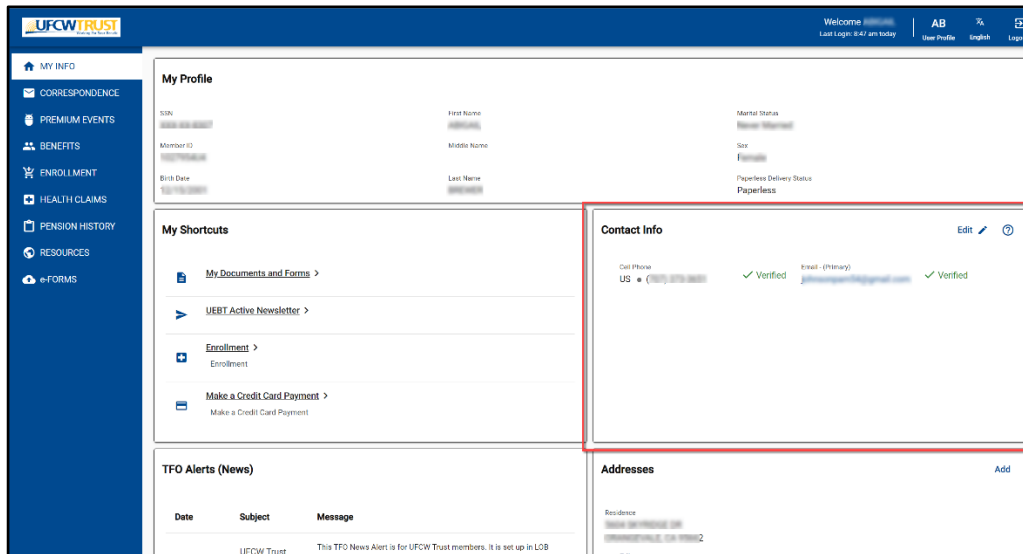
Paperless Delivery Status  
Paperless

Opt-in for SMS Mobile Notifications  
No

[Cancel](#) [Previous](#) [Confirm](#)

## Verify Phone Number and Email

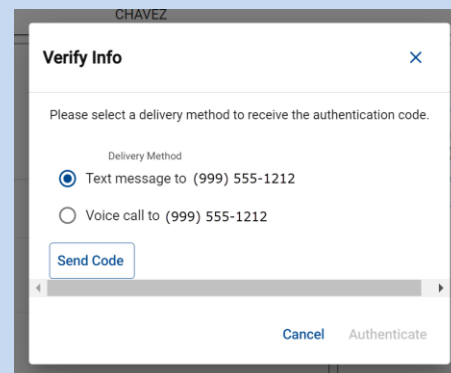
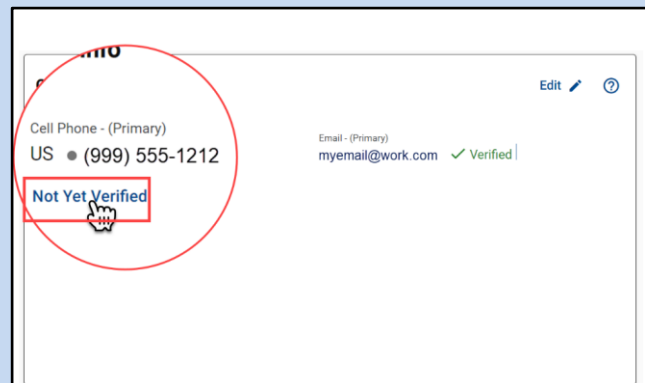
This section provides the step-by-step instructions you need to verify your phone number and email address.



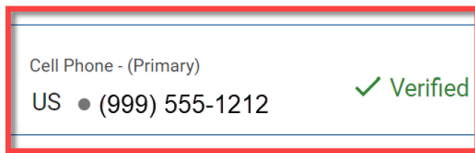
### Verify Phone Number

#### To verify your phone number:

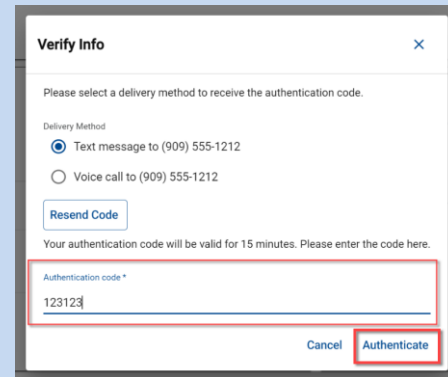
1. From the **MY INFO** tab in the portal, go to the **Contact Info** widget.  
In there, you will see your phone number and email address listed. Under them, there is a link that reads "Not Yet Verified".
2. Click **Not Yet Verified** under your phone number.  
The Verify Info window is displayed. Verify your number is correctly displayed.
3. Select the delivery method. Either **Text message** or **Voice call**.
4. Click **Send Code**.  
The window expands to provide the Authentication Code field.
5. If you selected:



- a. **Text message**, check your phone for the Authentication code.
- b. **Voice call to**, you will receive the code from an automated caller.
6. Enter the **Authentication Code**.
7. Click **Authenticate**. The window is closed, and the Contact Info section now shows your phone number as *Verified*.



Cell Phone - (Primary)  
US • (999) 555-1212 ✓ Verified



**Verify Info**

Please select a delivery method to receive the authentication code.

Delivery Method

☒ Text message to (909) 555-1212

☐ Voice call to (909) 555-1212

[Resend Code](#)

Your authentication code will be valid for 15 minutes. Please enter the code here.

Authentication code \*

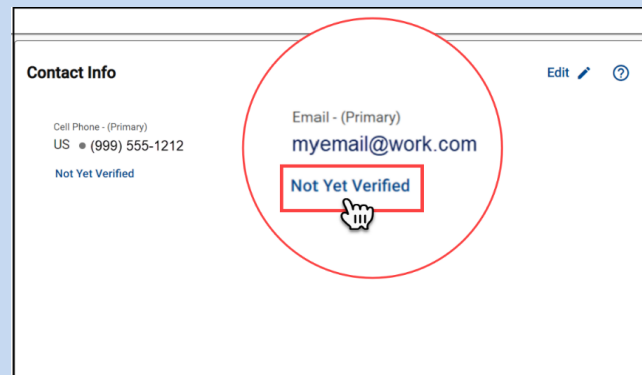
123123

[Cancel](#) [Authenticate](#)

## Verify Email

### To verify your email address:

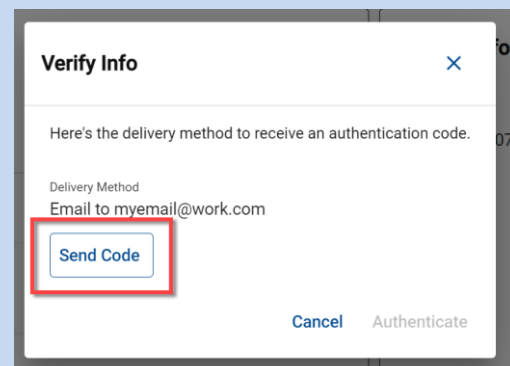
1. From the **MY INFO** tab, go to the **Contact Info** widget.
2. In there, you will see your phone number and email address listed. Under them, there is a link that reads "Not Yet Verified".
3. Click **Not Yet Verified** under your email name.
4. The Verify Info window is displayed. **Check** that it lists your correct email address.
5. Click **Send Code**. The window expands to provide the Authentication Code field.
6. The system will send a code to your email. Check your email to get the code.
7. Enter the code in the **Authentication Code** field.
8. Click **Authenticate**. The window is closed, and the Contact Info section now shows your email as *Verified*.



**Contact Info** [Edit](#) [?](#)

Cell Phone - (Primary)  
US • (999) 555-1212  
[Not Yet Verified](#)

Email - (Primary)  
myemail@work.com  
[Not Yet Verified](#)



**Verify Info**

Here's the delivery method to receive an authentication code.

Delivery Method

Email to myemail@work.com

[Send Code](#)

[Cancel](#) [Authenticate](#)

Email - (Primary)  
myemail@work.com ✓ Verified

Verify Info

Here's the delivery method to receive an authentication code.

Delivery Method  
Email to myemail@work.com

[Resend Code](#)

Your authentication code will be valid for 15 minutes. Please enter the code here.

Authentication code \*  
588038

[Cancel](#) [Authenticate](#)

**Congratulations!** You can now use your account to view and update demographic information, complete an enrollment, add/remove dependents, review health claims, pension history, and to share information with the fund office using secure messaging and document uploads!