Meadows Urquhart Acree & Cook, LLP
Certified Public Accountants

How to Set Up Multi-Factor Authentication: Quick Guide

There are three options for setting up multi-factor authentication: the **Thomson Reuters App**, a **Third-Party App**, and the **Thomson Reuters Authenticator Card**. Each option is outlined below, along with page numbers to the full guide.

Thomson Reuters App (pgs.4-5):

1) Open your app store and download the Thomson Reuters app (click "Next" on the computer).
2) Open the app and scan the QR code.
3) You should get a "Pairing Successful" message and have the opportunity to name your authenticator. Click "Finish" when done, and you should be into your account.
4) The next time you sign in, open your app and click the green check mark or enter the code.

Third-Party App (pgs.6-8):

1) If you do not already have a third-party authenticator on your phone, open your app store to download one (we recommend going with the Thomson Reuters app if you don't already have a third-party authenticator).
2) Open the app and scan the QR code. Enter the code that is displayed in your app in the text window and click "Next."
3) You should get a "Pairing Successful" message and have the opportunity to name your authenticator. Click "Finish" when done.
4) Save the emergency access codes in a safe place in case you have trouble signing in at any point. If you have to use one to sign in, please reset your multi-factor authenticator option and/or generate more codes if needed until then.
5) The next time you sign in, open your app, enter the code in the text window when prompted, and click "Go."

Thomson Reuters Authenticator Card (pgs. 8-10):

1) Click here to purchase a Thomson Reuters (TR) card. (The cost is $35.59/card, if buying 1-2.)
2) Once the card has arrived, click through multi-factor authentication setup (select the option for the TR card) until you get to the page to validate your multi-factor device.
3) Enter the 9-character ID on the back of your TR card (the ID will start with TR) into the first window on your screen. Press the "on" button on the front of the card and enter the 6-digit code in the second window. Click "Next."
4) You should get a "Pairing Successful" message and have the opportunity to name your authenticator. Click "Finish" when done.
5) The next time you sign in, turn on your TR card, enter the 6-digit code when prompted, and click "Go."

To change your multi-factor authentication, see pgs. 10-11 in the full guide. Thomson Reuters offers troubleshooting on their website. **Please contact our office at 804-249-5786 if you have any questions** — our Admin team will be happy to help!

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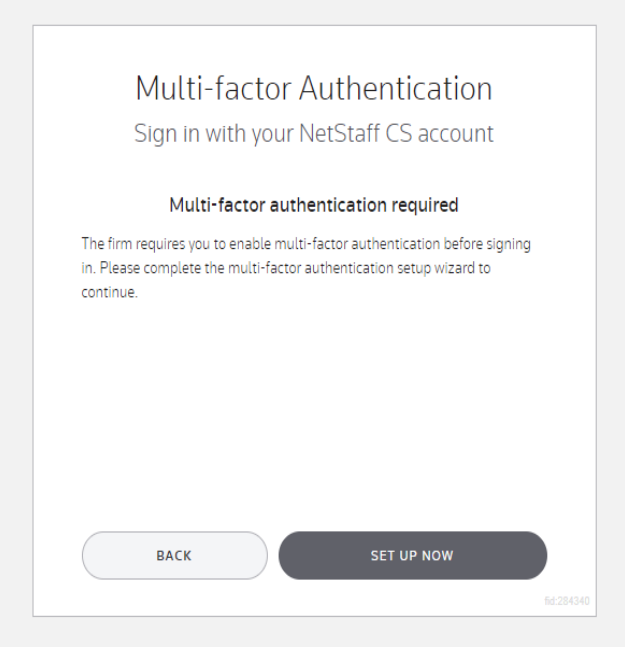
How To Set Up Multi-Factor Authentication: Full Guide to Accessing Your Client Portal

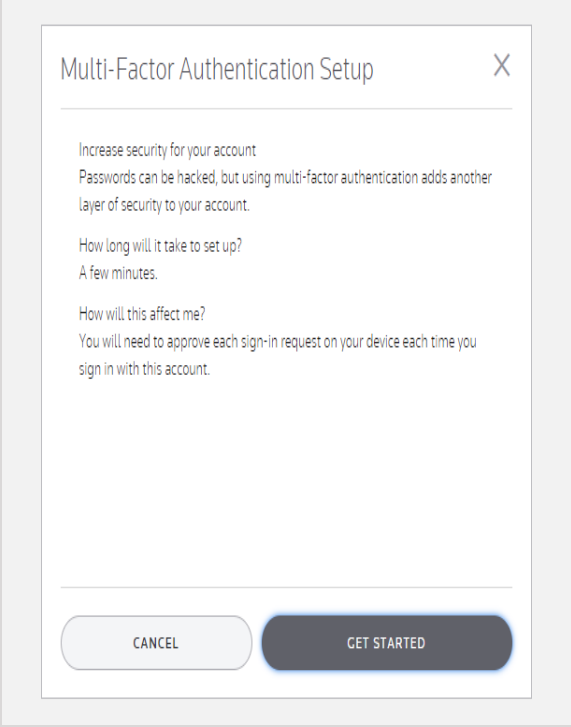
Introduction

The purpose of this guide is to ease the transition into using multi-factor authentication by walking our clients through the step-by-step process of setup. The value of having a multi-factor authenticator is that it adds an extra layer of protection to keep our clients' sensitive financial information secure and free from information fraud and identity theft. While initial setup may take a few minutes, once the multi-factor authenticator is in place, it is incredibly quick to use.

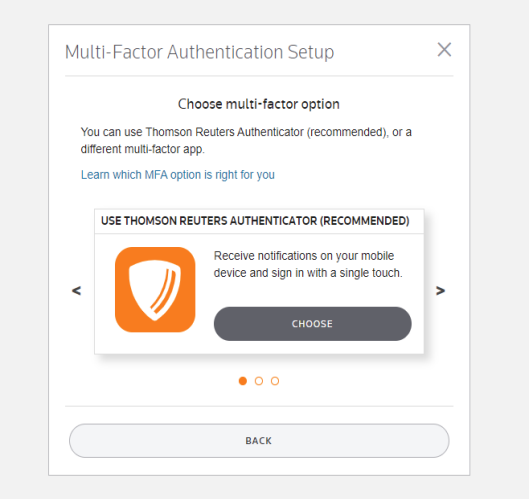
Setting Up Multi-Factor Authentication

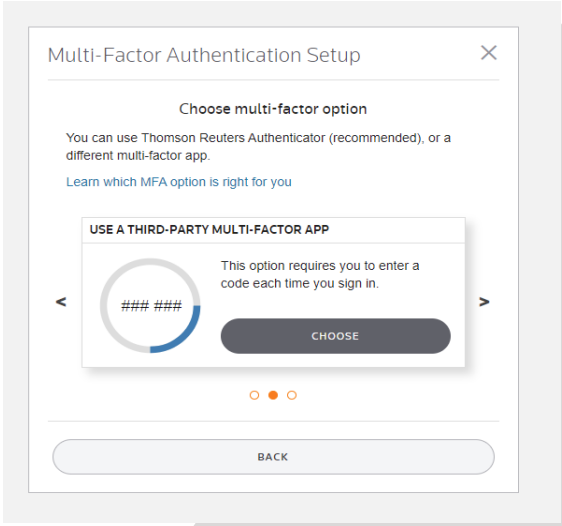
The next time you go to login to your client portal, this message will pop up, with the second one following:

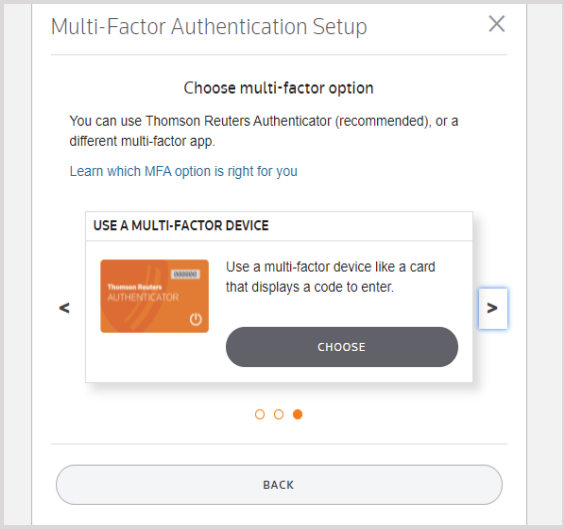




You will then be presented with three options for setting up multi-factor authentication: 1) The Thomson Reuters App, 2) A Third Party Authenticator App, or 3) The Thomson Reuters Card. Let's look at each of these three options below:







There are three options for setting up multi-factor authentication:

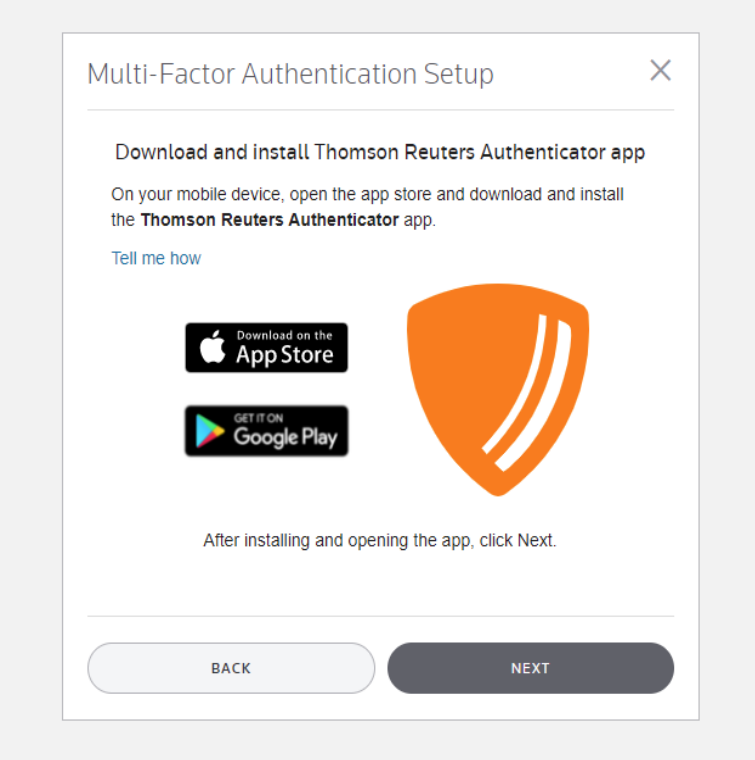
1. The Thomson Reuters App

2. A Third-Party Authenticator App

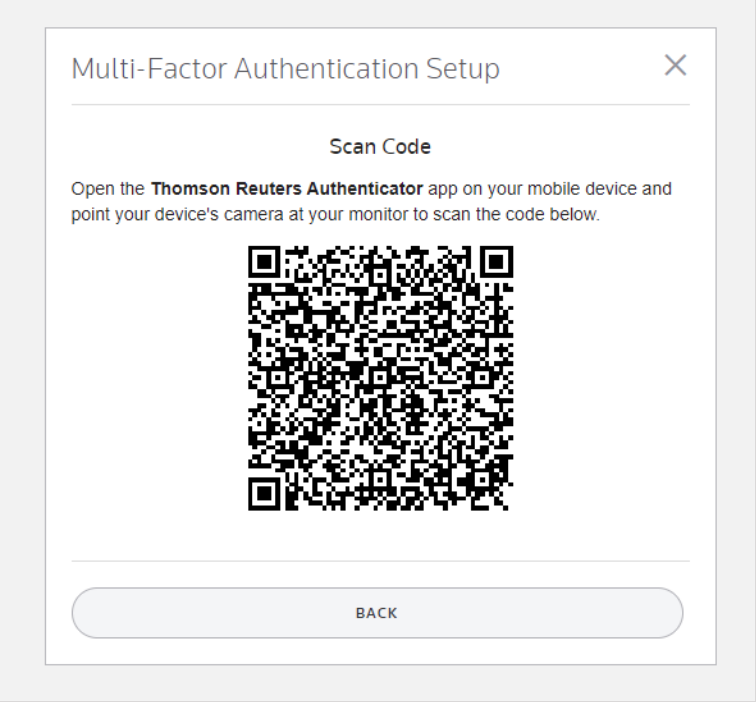
3. The Thomson Reuters Card

Option 1: The Thomson Reuters App

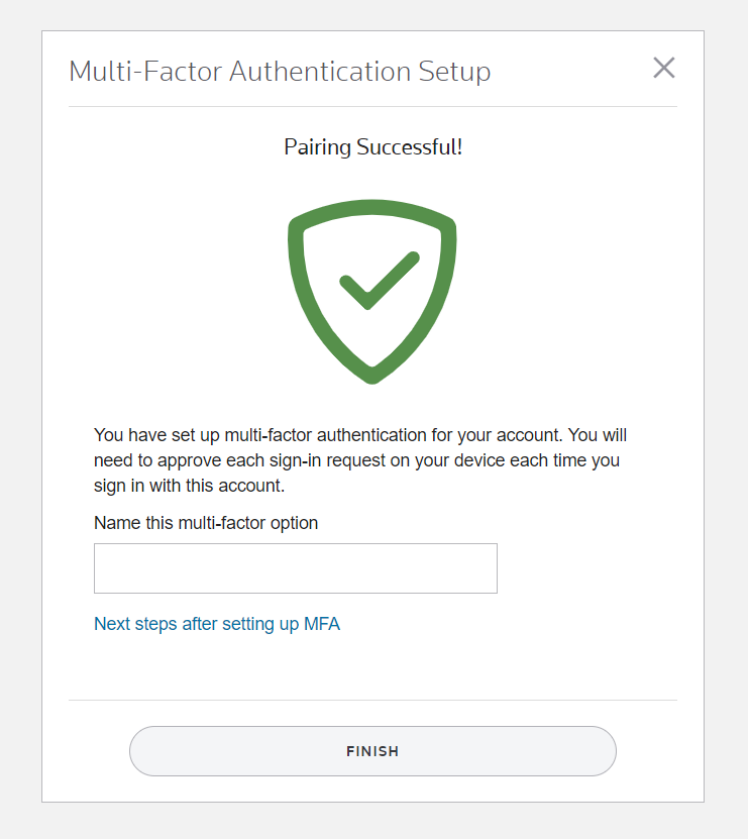
First, let's look at the option for choosing the Thomson Reuters App. This option works well if you have a smartphone. Follow the prompts on the screen and your phone to download the app, then click "Next."



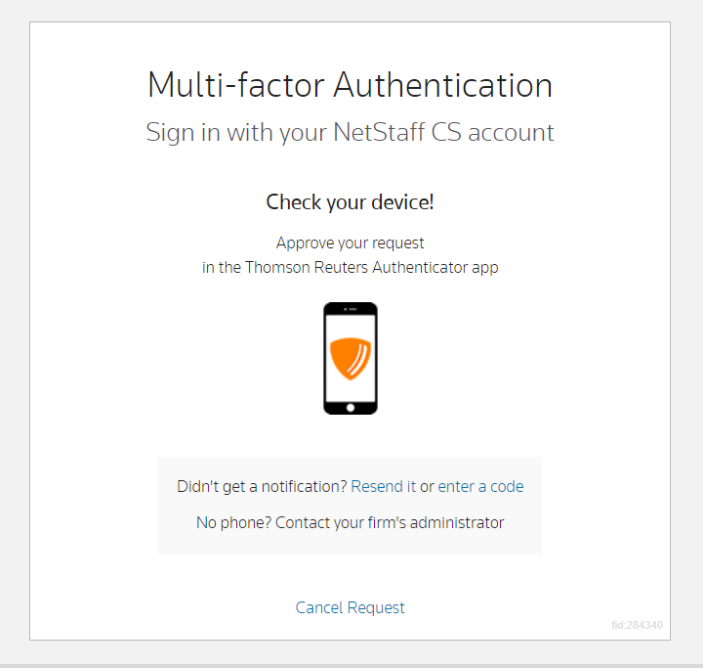
Open the Thomson Reuters App and point your camera at the computer screen to scan the code. You may need to allow the app to access your camera in settings (if so, follow the prompts on your smartphone screen to turn the camera access on, then return to the app).



You will get a message saying “Pairing Successful,” and a prompt will come up on the screen for you to name your authenticator. When you are done, click “Finish” and you will be set up!



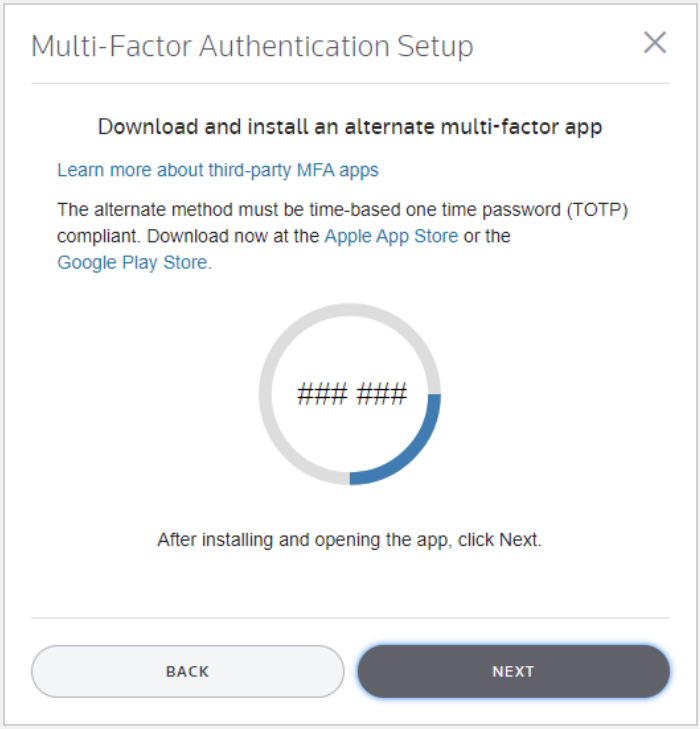
The next time you go to sign in, after entering your username, password, and checking the box, you should get this prompt to check your device. Open the Thomson Reuters app and either click the green check mark or opt to enter the code on your computer. Once the verification process is complete, you should be into your portal.

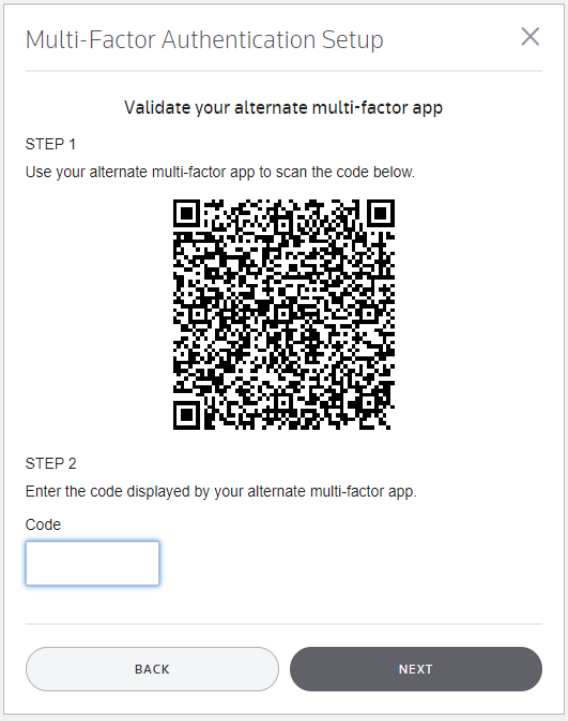


Option 2: A Third-Party Authenticator App

A third-party authenticator app works much in the same way as the Thomson Reuters app and is a good option if you already have a multi-factor authenticator (MFA) app on your phone and don't want to have more than one app (for example, if you are already using an MFA app for work.) If you don't already have a MFA app, we would recommend going with option 1, since Thomson Reuters support team cannot assist with third-party software, should you run into any technical difficulties.

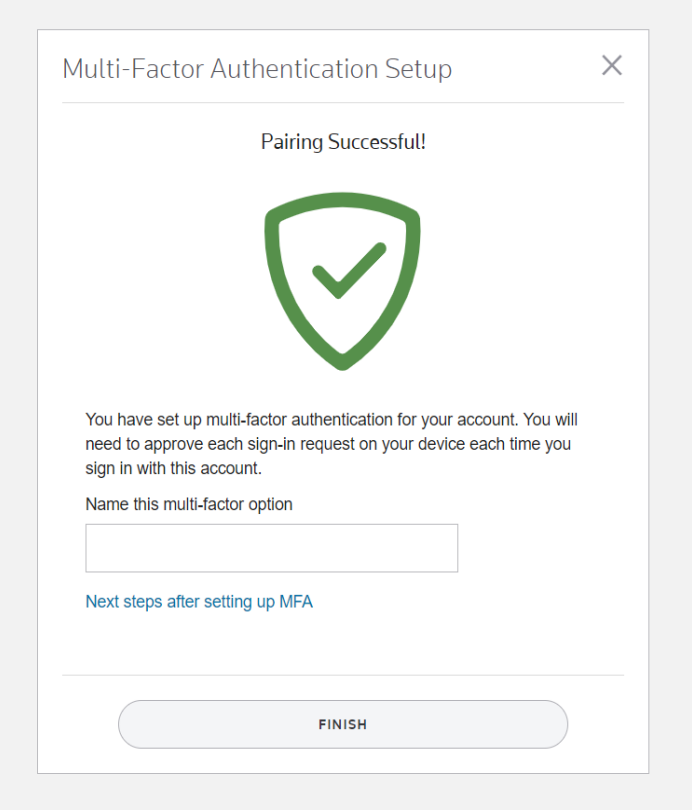
If you decide to go with option 2, select it from the options page (shown on page 2 of this guide) by clicking the right arrow. Once you confirm you have your desired MFA app on your phone, click "Next."



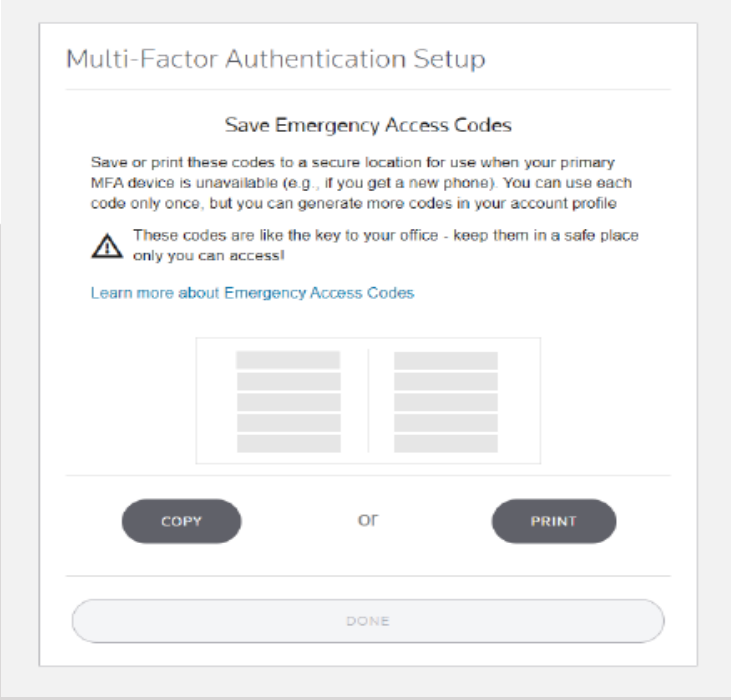


Open your MFA app and scan the QR code on the screen. Next follow the prompts in your app to link your account with it and enter the code displayed in your multi-factor app on the computer screen. Then click "Next."

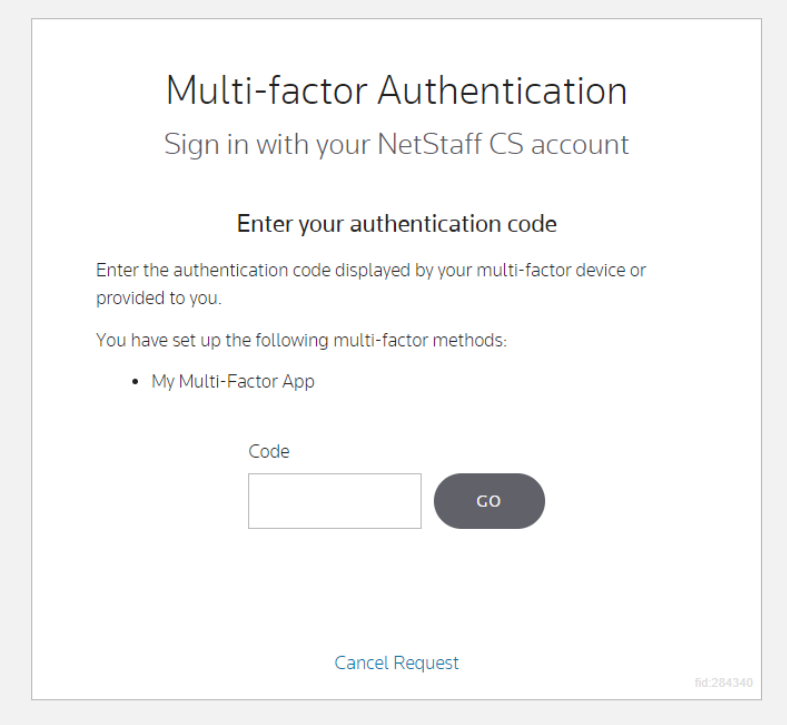
As with the first option, you will get a message saying “Pairing Successful,” and a prompt will come up on the screen for you to name your authenticator. When you are done, click “Finish.”



As part of the setup process for a third party MFA app, you will receive emergency access codes to use if, for some reason, your MFA device is not working or is unavailable (for example, if you get a new phone). As the screen says, keep these codes in a safe place. They only work once, but will allow you access to your portal where you can change your multi-factor authentication method (more on how to do this on page 9) for access in the future.



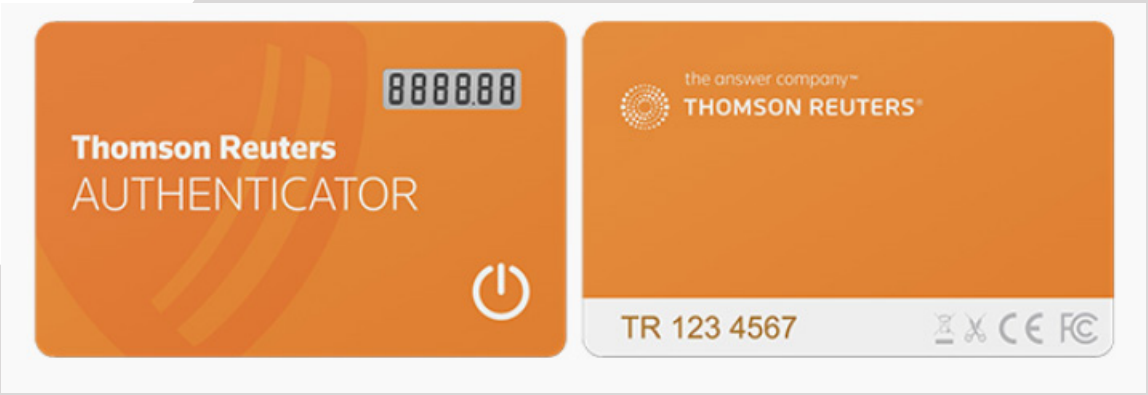
The next time you go to sign in, after entering your username, password, and checking the box, you should get this prompt to check your device. Open your MFA app and enter the code on your computer. Once the verification process is complete, you should be in your portal.



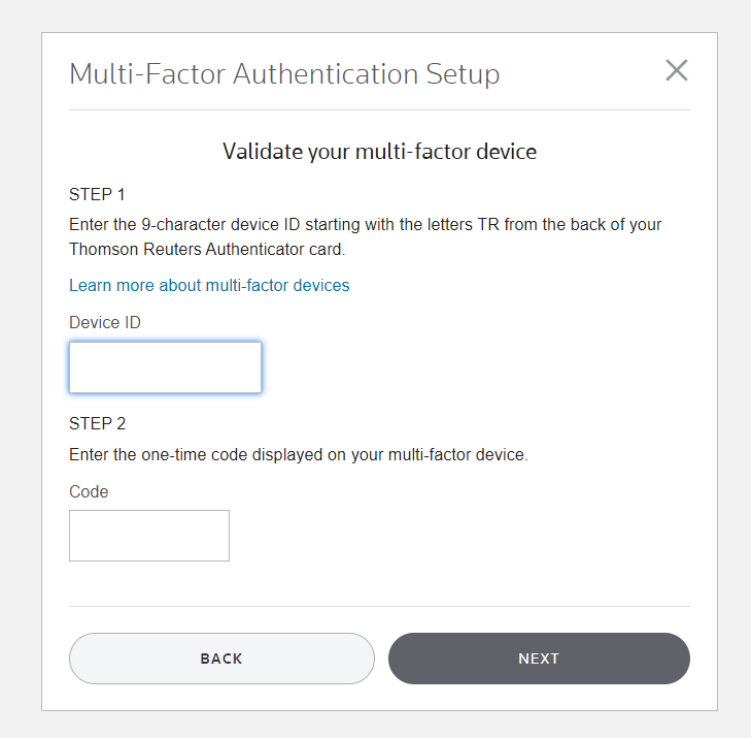
Option 3: The Thomson Reuters Authenticator Display Card

The third and final option for setting up multi-factor authentication is to use the Thomson Reuters (TR) Card. This option is great if you do not have a smartphone and therefore are unable to download one of the two MFA apps, or if you would like to use it as a backup to your mobile device. The cost of the TR card is $35.59 each if purchasing one - two cards, with the price per card decreasing the more cards you purchase. Click here to purchase a TR card(s).

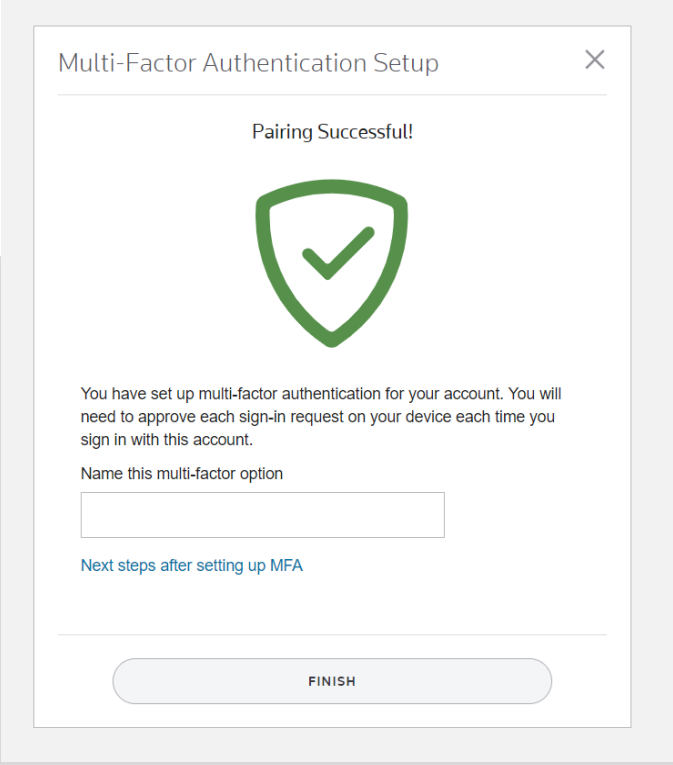
These cards are the size of a credit card and are easy to use. Each time you go to sign in to your portal, simply press the power on/off button in the bottom right corner of the card (shown below) and enter the 6 digit code that appears in the display window in the top right.



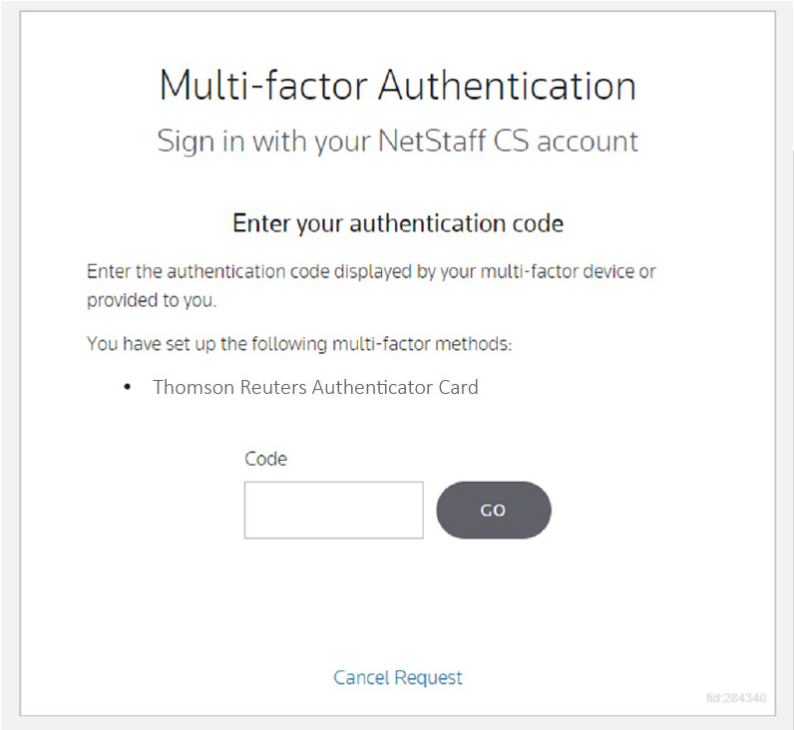
The first time you go to link your card to your account, enter the 9-character code beginning with TR, on the back of your card, into the first window on your computer screen. After that, press the card's "on" button (if it is not on already) and enter your 6 digit code into the second window on the computer screen. Click "Next" to continue.



You will get a message saying "Pairing Successful," and a prompt will come up on the screen for you to name your authenticator. When you are done, click "Finish" and you will be set up!



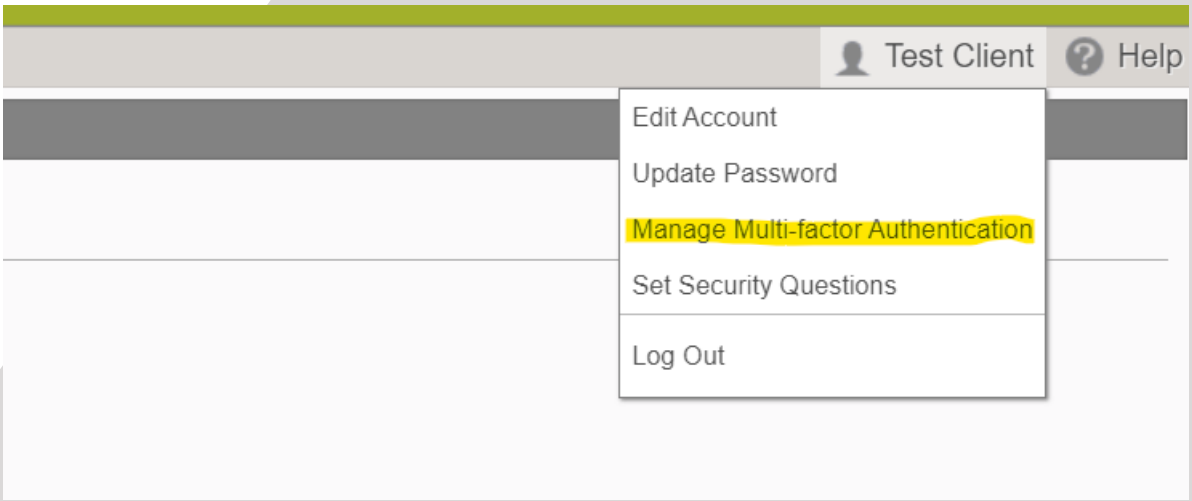
The next time you go to sign in, you should not need to enter the 9 character code on the back of your TR card, just the 6 digit code that appears in the display window in the top right on the front of your card. Enter the code when prompted, and you should be into your account.



How to Change Your Multi-Factor Authentication Method

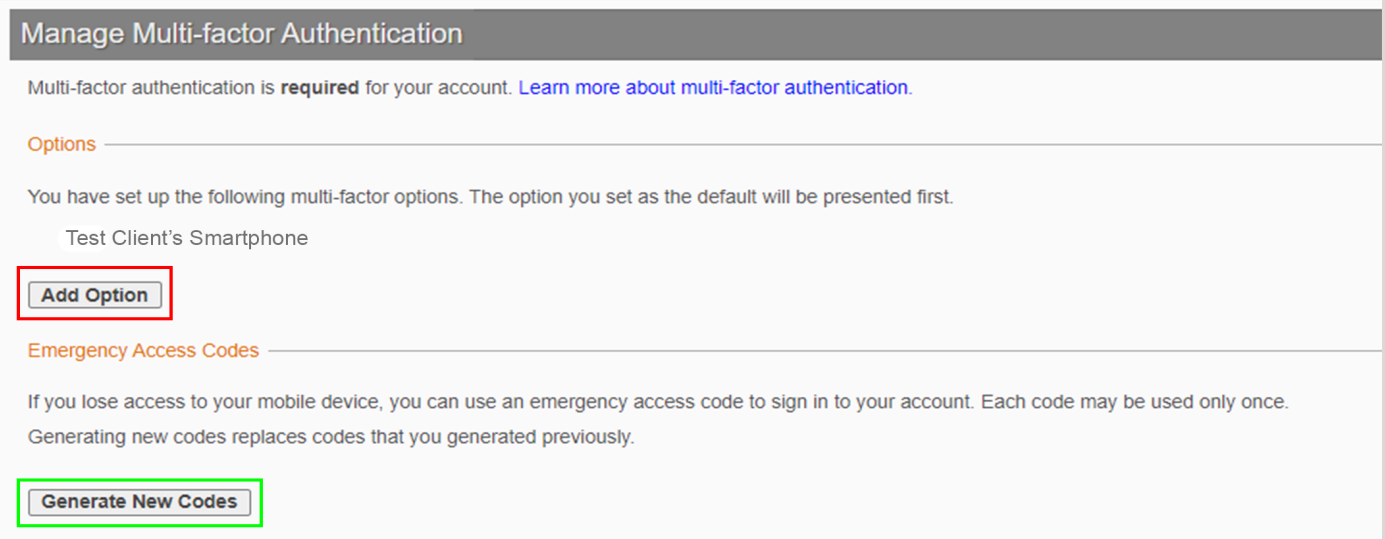
There may be a time you want to change your method of multi-factor authentication in the future (for example, if you get a new smartphone, get rid of your smartphone, or want to try a different method). To do this, you will need to sign in and use your current method of multi-factor authentication (or one of the emergency codes, if your third-party authenticator is not working).

Once you are inside your portal, click on your name on the upper right side of the screen. A drop-down menu should appear, and from that menu select “Manage Multi-factor Authentication” (highlighted in yellow below).

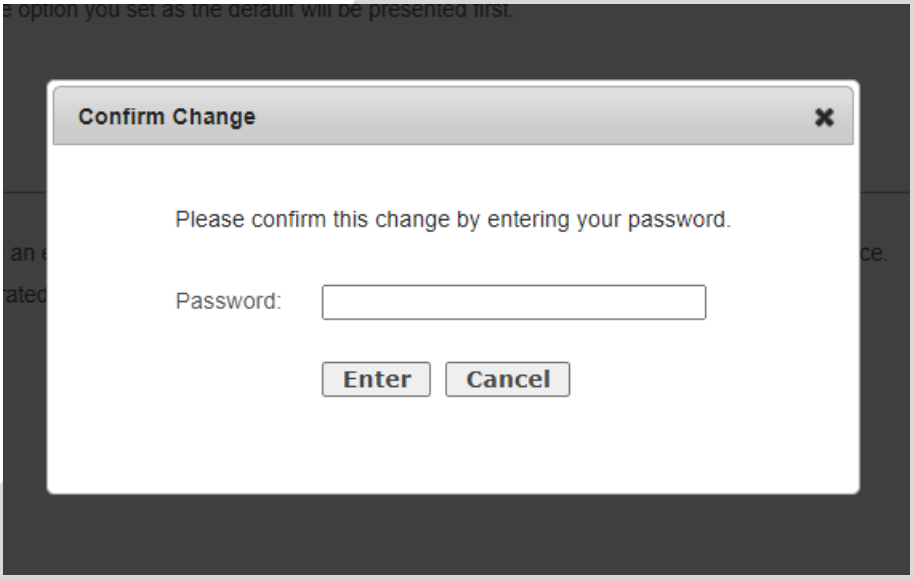


You should see the option you are currently using for multi-factor authentication, as well as a button to add an option below it (outlined in red). Click this to add another method for multi-factor authentication.

You will also see an option to generate new emergency codes, should you need them. If you decide to generate new codes, keep those in a safe place and discard your old codes, as they will no longer work. This option is outlined in green below.



It will ask you to confirm this change by entering your password.



This will take you back to the first page of multi-factor authentication setup where the whole process begins (see page 2 of this guide). Choose whichever option of MFA works best for you and follow the prompts to set it up.

Troubleshooting

If you run into any technical difficulties along the way, Thomson Reuters has a web page setup to help with troubleshooting. They cover issues such as having a lost or new device, MFA setup issues, and login issues after MFA setup. Please refer to this web page if you encounter difficulty (pictures of the web page shown below).

Multi-factor authentication (MFA) troubleshooting

+ Show expandable text

Use this article to troubleshoot multi-factor authentication (MFA) issues with your account, your device, or your software. Before following any instructions listed here, find out which account type you have:

- *Example of Thomson Reuters ID (TRID) login.*
- *Example of NetStaff CS, Virtual Office, Software as a Service login*

Lost or new device

If you lose, replace, or reset your MFA device you'll lose the MFA pairing for your account.

- **If you have a backup MFA option** enabled, see Remove MFA devices from an account to remove or add a new device. Otherwise, your firm administrator can generate a temporary access code for your account.
- **If your admin account is inaccessible** and another admin is not available, contact Support at 800.968.0600 for help.

TRID instructions for administrators

+ Generate a temporary code for another account

NetStaff CS administrators

+ Generate a temporary code for another account

MFA Setup issues

Use the links below to learn more about specific issues you may encounter after setup.

+ "We're unable to verify your profile information"
+ "Something went wrong"
+ "Timed out waiting for Scan. Please go back and try again"
+ Unable to scan the QR code when pairing your login credentials to the mobile app.

Login issues after MFA setup

+ Mobile device doesn't receive approval request
+ Application does not prompt for MFA when signing in
+ Approved sign in on device, but website or application times out waiting for approval
+ Device asks for fingerprint scan, facial recognition or a passcode, but these are not enabled.
+ Receiving MFA prompt on Apple Watch, but can't approve the login request.
+ Nothing happens when I approve the log in attempt on the device.
+ Prompted to set up MFA when e-filing in UltraTax CS, but it is already enabled.

If you have any questions along the way, please give us a call at 804-249-5786—our Admin team will be happy to help!