

Multi-factor Authentication Client Enrollment

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Introduction

When you sign into your online accounts, you're proving to the service that you are who you say you are. Traditionally that's been done with just a username and a password, however as criminals get smarter, so do the methods for protecting and proving your identity. Most online services like banks and social media, have added a way for accounts to be more secure. Multi-factor Authentication or MFA is used when you sign into the account for the first time on a new device or app (like a web browser). This extra security step is a way to confirm your identity when you sign in.

In this guide, we outline how to set up MFA to utilize BDO's hosted services.

HOW TO REQUEST MORE INFORMATION OR ASSISTANCE

If your company or organization has any questions about the experience or Multi-Factor Authentication (MFA), we have several ways for you to get assistance:

- Fill out the "Need Assistance or Help?" Form
- By phone at 1-800-546-2191 / M-F 9:00 am to 5:00 pm ET



Enrollment

NEW USER

The following information describes the most typical experience when accessing BDO USA hosted services for the first time.

Email invitation

These next steps should be done from your computer, not your mobile device.

To utilize and collaborate with BDO USA provided services, such as Client Portals or background checks or restricted entities, you will receive an email invitation to set up your account

=	M Gmail	Q Search mail			0
4	Compose	□• c :	<		٠
-		Primary	the second se		
	Inbox 12,578				
•	Categories	📄 👷 🍃 bdousa	You are invited to setup your new account for BDO USA - Greetings, As previously communicated, BDO is	Ja	n 11

In the email invitation, click on the "Get Started" button. You may log in or create an account using the same email address that received the invitation.



CREATING AN ACCOUNT

 If you do not have an existing Microsoft Account (personal) or Azure AD/O365 Account (work or school), you will need to create an account following the Microsoft account creation wizard.



After providing a password, you will need to prove your identity by entering a code that will be sent to your email address. Enter the code and click "Next". You may also subscribe to Microsoft promotional emails, as well as read Microsoft's Terms of Service here.



► Follow the prompts to verify you are not a robot and verify the security information is still accurate. Clicking "Looks Good!" completes the Microsoft account creation.



PERMISSIONS AND TERMS

 With your account created, you will be asked to confirm that BDO USA will be allowed to perform specific actions and retrieve specific account information.
 Please click "Accept" to continue. You will also have a chance to review the Terms and Conditions of BDO USA at this time.

	a 👘 🤤 com
	Review permissions
	ISSO BDO
	The organization BDO would like to:
Please note: BDO only has	✓ Sign you in
access to view your email	Read your name, email, and perhaps photo
address, not the contents.	You should only accept if you trust BDO. By accepting, you allow this organization to access and process your data to create, control, and administer an account according to their policies. BDO has not provided a link to their privacy statement for you to review. BDO may log information about your access. You can remove these permissions at https://myapps.microsoft.com/bdo4.onmicrosoft.com.
	Cancel Accept

SET UP MULTI-FACTOR AUTHENTICATION (MFA)

The screen below will appear when MFA has not been configured or has been reset.

 Click the 'Next' button to proceed with enrollment, where the following screen will be presented with the various options for adding this additional security to the account.



- Keep your account secure

 Your organization requires you to set up the following methods of proving who you are.

 Microsoft Authenticator

 Microsoft Authenticator

 On your phone, install the Microsoft Authenticator app. Download now

 After you install the Microsoft Authenticator app on your device, choose "Next".

 Image: Ima
- Choose one of the buttons indicated above based on the best or most convenient method of approving login requests for your account.

- Using the Microsoft Authenticator App to receive notifications on a mobile device to approve login requests.
- To use phone call authentication, choose the 'I want to set up a different method' option to change over to the phone-based approval. Text message authentication is not supported for BDO.com accounts.
- (Advanced) To set up a third-party authenticator app such as YubiKey, Authy, etc. or if you require the ability to complete MFA without an internet connection choose the 'I want to use a different authenticator app' option.

The process for enrollment in each of these methods can be found under the appropriate header below.

Microsoft Authenticator App

- If needed, install the Microsoft Authenticator app as instructed Once the app is installed, press the 'Next' button to begin setup.
- If the Microsoft Authenticator app is already in use, add an additional account to the app via the + button indicated below.



When prompted, choose 'Work or School account' from the available options.



> Choose to scan a QR Code when prompted.



 On the MFA setup screen, choose the 'Next' button to display the QR code for setup.



 Scan this code with the mobile device to complete the setup and a new entry for BDO will appear in the mobile app.

≡ Authenticator	Q	+
Ä		>
BDO .com#E	EXT#@bdc	>) >

Once this appears in the mobile app, choose 'Next' on the setup screen to perform a test to ensure the app is working correctly.

Authenticat				
. / turner turcut	or			
Let's try it out				
Approve the notificatio	n we're sending t	to your app by ent	ering the number sh	own belo
		70	Back	
	Let's try it out	Let's try it out	Let's try it out Approve the notification we're sending to your app by ent 78	Let's try it out Approve the notification we're sending to your app by entering the number sh 78 Back

Input the verification code provided to the mobile app to complete the sign in process. Once confirmed, choose 'Next.'

	Keep your account secure	
Your o	ganization requires you to set up the following methods of proving who you are.	
Success!		
Great job! You ha Default sign-in i	re successfully set up your security info. Choose "Done" to continue signing in. rethod:	
	Do	ne

Select 'Done' to complete the enrollment.

Phone Call Authentication

► To use phone call authentication, choose the 'I want to set up a different method' text and choose 'Phone' from the dropdown, then press the 'Confirm' button.

Choose a different m	ethod $ imes$
Which method would you like	to use?
Choose a method	\sim
Authenticator app	
Phone	

In the next prompt, choose the appropriate country code and enter a phone number to be used for the verification call.

Kee	ep your account secure
Your organization require	es you to set up the following methods of proving who you are.
Phone	
You can prove who you are by answ	vering a call on your phone.
What phone number would you like	e to use?
United States (+1)	~
Call me	
Message and data rates may apply. and cookies statement.	Choosing Next means that you agree to the Terms of service and Privac
	March

- > Once the country code and phone number have been entered, choose 'Next.'
- ▶ You will receive a phone call from one of the following numbers: 866-539-4191, 855-330-8653, or 877-668-6536. Answer the incoming call and press the # key to complete the verification.
 - If the call is not coming through, these numbers may need to be added as a contact or unblocked in spam call filtering depending on phone configuration. Typically, adding a contact with those three numbers will bypass most spam filters.
 - Once the approval has been completed successfully, a confirmation screen will appear. Choose 'Next' to confirm the settings, then 'Done' complete the enrollment.

Keep your account secure	
Your organization requires you to set up the following methods of proving who you	u are.
Phone	
We're calling +1 now.	
	Back

Third-Party Authentication App

- ► As there are many different third-party options for MFA, please consult with your specific application's documentation for instructions to add an additional account.
- In general, when this option is selected you will be presented with a QR code to set up the account.
- Choose 'Next' once the account has been configured and input the code displayed to complete the authentication.



	Keep your account secure
You	r organization requires you to set up the following methods of proving who you are.
Authen	ticator app
xxx xxx	Enter code Enter the 6-digit code shown in the Authenticator app. Enter code
	Back Next

• Choose 'Next' to confirm settings and complete the enrollment.

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If you need assistance with setting up MFA or need to have the configuration on your bdo.com account reset due to replacing a phone, new phone number etc., please contact the BDO Client Support help desk at 800-546-2191 from 9:00 am to 5:00 pm EST Monday through Friday.

DELIVERY TO APPLICATION

- You may be asked to confirm your login username (email address) by clicking on it as part of the sign-in process to the application.
- If you are not asked, you will automatically be taken to the application you were linked to.
- Before the application loads, you will receive an MFA challenge. The application will load after you've approved the login or entered the code (depending on your chosen method of authentication).

OTHER EXPERIENCES

The previously described steps are the most typical for first time sign-in, but the following factors may change that process.

- Existing Microsoft Account (Personal/Free): If you choose to use an existing account or are directed to do so by your company/organization, you will skip the "creating an account" steps.
- Your company/organization utilizes Microsoft cloud services: If you have a corporate-class account with Microsoft (often referred to as a "Microsoft Work or School account"), you will skip the "creating an account" steps and might skip the "Setup Multi-Factor Authentication" steps. Depending on your account, your IT department may also need to enable your account to share information with BDO USA.

Existing Microsoft Accounts

We have identified common issues for those who have existing Microsoft Accounts when accessing BDO Global and BDO USA systems. These issues are listed below:

Not realizing you have an existing Microsoft account:

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- Many do not realize they have a Microsoft account when attempting to join the BDO organization. (Using the invitation URL provided in invitation emails.)
- When you get to the Microsoft account screen and put in your email address, the system will automatically prompt you to put in a password if your email address is already associated with a Microsoft account.
- On the password screen, try your standard password or click the "Forgot my password" option.
- Depending on how your organization has setup your Microsoft accounts, you may get different error messages (see the example screenshot to the right) when trying to recover your password.
- When trying to recover a password (or attempting to log in) the error message will often involve the phrase "your organization". These key words are an indicator that you have an existing Microsoft Account setup through your organization. Helpful tips:
 - Do you use Office 365 or Microsoft Online? If the answer is yes, or I don't know, try logging in with your email and password that you use to log in to your email or computer. If your log in is successful, you can continue the MFA setup process.
 - If you are unable to log in, then we recommend contacting your IT department and indicate that you are trying to login to a BDO USA system that requires a Microsoft Login.

Clientaccount@alreadvaMSacc	ount.com		
Enter password			
Keep me signed in Forgot my password Use the Microsoft Authenticator	Hicrosoft		
	Recover yo We can help you r info. First, enter yo the instructions be clientaccount@alt	ur account eset your password our Microsoft accou elow. readyaMSaccount.o	d and security unt and follow
		Cancel	Next
Aicrosoft Get back into your a	ccount		
Ve're sorry ou cannot reset your password at this time becau	se required licenses are missing fro	m <mark>your organization.</mark> There is n	o further action you can take to
solve this situation. Please <u>contact your admin</u> as squirements for Azure AD self-service password n you'd like, we can <u>contact an administrator</u> in vo	nd ask them to check license assign eset. ur organization to reset your passw	ment. To learn more about lice	nsing read the article <u>Licensing</u>
dditional details: SSPR_0012: Your organization	does not have the required license	s necessary to perform passwor	d reset. Please contact your admir

- > You have a Microsoft Account but the username is not your email address:
 - It is possible for invited clients to have an existing account with Microsoft, but their usernames are not their email addresses. This happens when the client organization is transitioning to Microsoft for authentication.
 - If you are unable to recover your password or move past entering your email address as the username:
 - Do you currently use Office 365 or Microsoft Online? If so, do you login to Office 365 or Microsoft Online with another username other than your email address?
 - If your username is different than your email address, BDO will need to invite the username used to log in. Once the invitation is complete, you will be able to login within your alternate username and current password defined by your company.
 - You can request an invitation be resent with a different email address via the Need Assistance or Help? form.

At BDO, our purpose is helping people thrive, every day. Together, we are focused on delivering exceptional and sustainable outcomes — for our people, our clients and our communities. Across the U.S., and in over 160 countries through our global organization, BDO professionals provide assurance, tax and advisory services for a diverse range of clients.

BDO is the brand name for the BDO network and for each of the BDO Member Firms. BDO USA, P.A., a Delaware professional service corporation, is the U.S. member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms: www.bdo.com

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