Account Profile- Multi-Factor Authentication (MFA) FAQs

05/13/2026 11:35 am CDT

Multi-Factor Authentication (MFA) FAQs

Note: While users may only use two factors during login, the system supports multiple authentication methods. For consistency, this feature is referred to as Multi-Factor Authentication (MFA).

Q1: Is the MFA a requirement? Top

No. Enabling MFA is an **optional** feature for all user types.

Q2: I do not see Account Profile under my login when I click on the Wolters Kluwer Logo > Administrative Tasks. Top

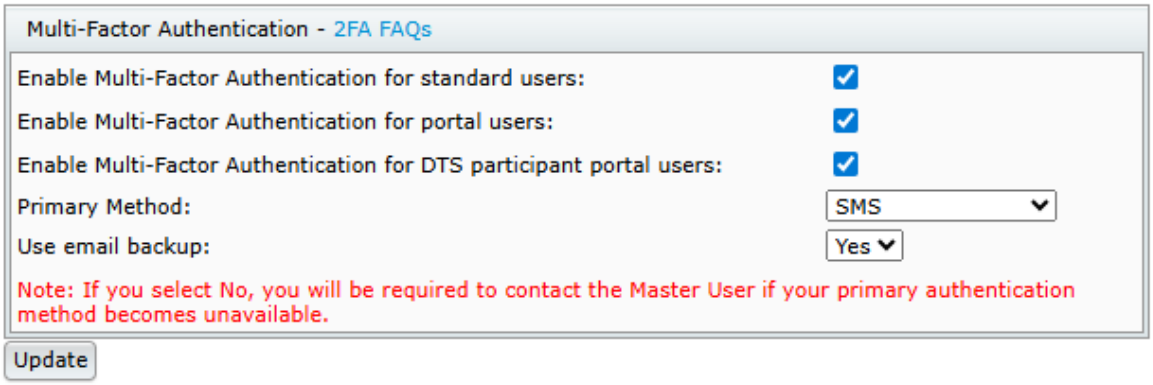
Only the **Master User** on the account can access Account Profile and configure Multi-Factor Authentication settings. If you do not see this option, please contact the Master User on the account for assistance.

Q3: Can we add this for only our firm's users, or do Portal Users have to have this feature as well? Top

You can choose how MFA is applied. It can be enabled for:

- Standard Users only
- Portal Users only
- DTS Participant Portal Users only

- Any combination of the above



Q4: Who is considered a "Standard User"? Who is considered a "Portal User"? Top

- **Standard User**: A member of your firm who logs directly into the ftwilliam.com software.
- **Portal User**: Your client who accesses the Portal to sign documents, e-file 5500s, upload files, etc.
- **DTS Participant Portal User**: A plan participant who logs into the DTS Participant Portal to view plan information or complete participant-related tasks.

Q5: Is it possible to request only specific Users/ Portal Users be required to use the MFA, or is it an "all on" or "all off" feature? Top

Currently, MFA is an ***all-or-nothing*** setting. You cannot enable it for individual users. We are exploring options for more granular control in the future, but there is no timeline yet.

Q6: Will our clients that use single sign-on via PensionPro be affected by the MFA? Top

No. MFA does not impact clients using PensionPro single sign-on. It only applies to those logging directly into the Portal.

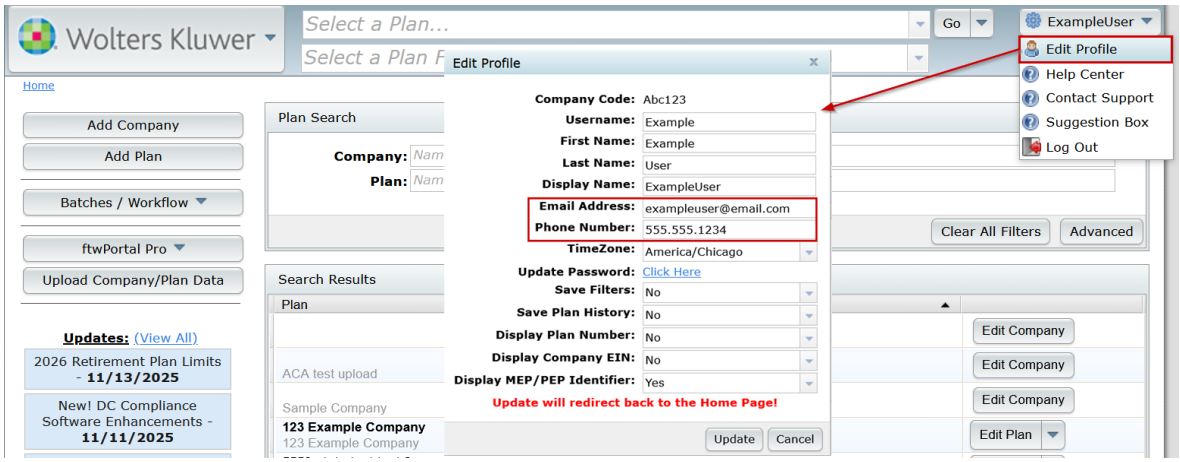
Q7: Many of our Portal Users and FTW Users only have emails in their profiles, no cell phone numbers. Would that be a problem for MFA? Top

No problem. Users can verify using email **if email backup is enabled** on their account. Phone numbers are optional unless SMS is selected as the primary verification method. We strongly recommend all users have a valid email address on file.

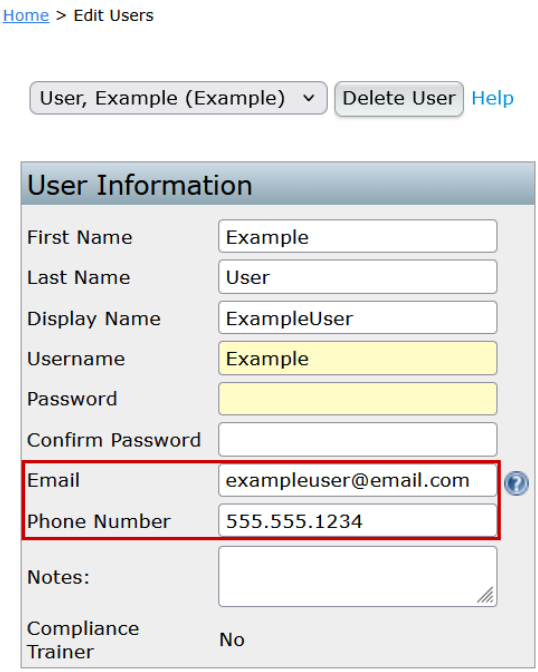
Q8: Where are the phone numbers and email addresses for this purpose stored?
Is this information that we can see, or is it stored internally somehow? Top

Yes, you can view this information:

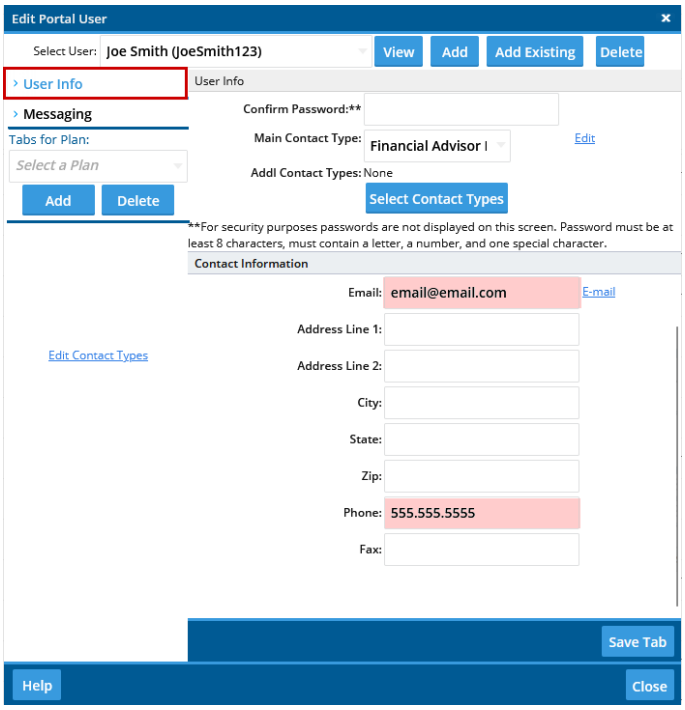
- **By Standard Users:**
  - Users can view their own details from within the **Edit Profile** link (click your name in the upper-right corner).



- **By Admins (Designated Admins or the Master User)**
  - Users with Administrative privileges can view all user details under **WK Logo > Administrative Tasks > Users**.



- **To View Portal Users**:
  - Details are stored in the **Edit Portal User Form** under the **User Info** tab.



Q9: What if a user is not receiving a verification code to their cell phone or e-mail? How do we get them into the portal? Top

Try the following steps:

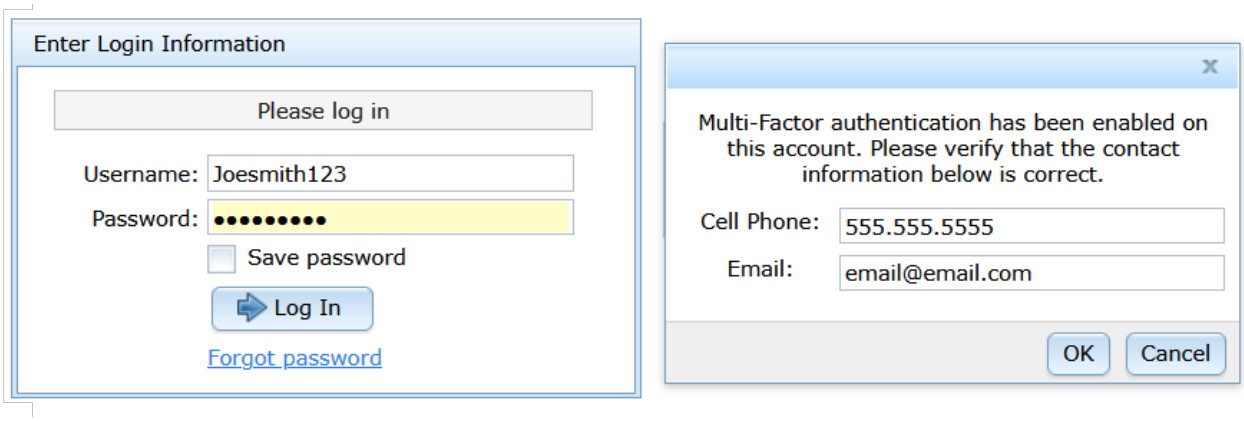
- Confirm that an email address and/or phone number is listed in the user's profile
- If one delivery method fails, use the other (for example, email instead of phone)
- Ensure contact information is up to date (see Q8)

If the user cannot receive a verification code and does not have a backup method configured, they must contact their **plan administrator** to regain access.

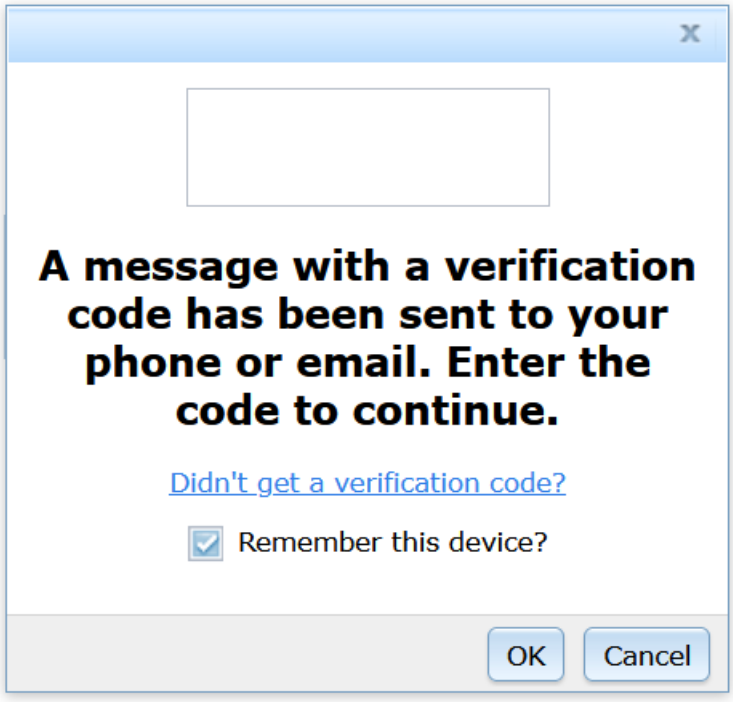
Q10: What will our Clients see when they log in for the first time when the Primary Method is SMS or Email? Top

When MFA is enabled, the first login looks like this:

- **Log in and confirm details**
  Clients enter their username and password, then immediately verify their email and/or phone number on the next screen.



- **Receive and enter the security code**
  A one-time code is sent by text or email.
  - The code is valid for **15 minutes**.
  - After entering the code, they proceed as normal.



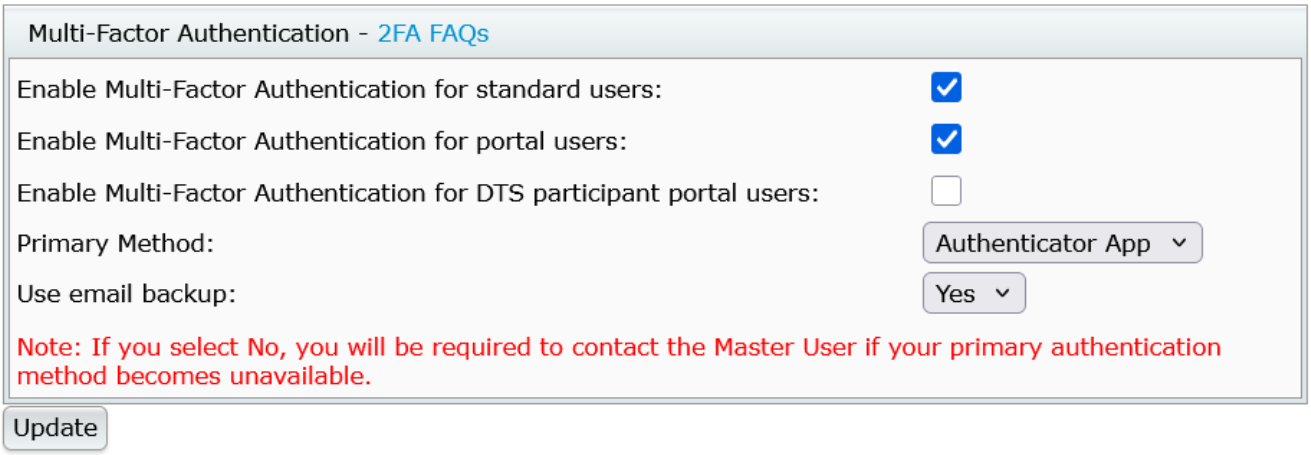
Email details:

- **Standard Users and 5500-only Portal Users**: Emails come from **donotreply@ftwilliam.com**.
- **Full Portal subscribers: Emails use the settings configured under Global Email Settings > Notifications.**

Q11: Is there an authenticator app option available for MFA as the Primary Method? Top

Yes. When MFA is enabled, the Master User can configure the authenticator app in the Account Profile as the Primary

Method for the entire company. This setting applies to all users included in the MFA configuration.

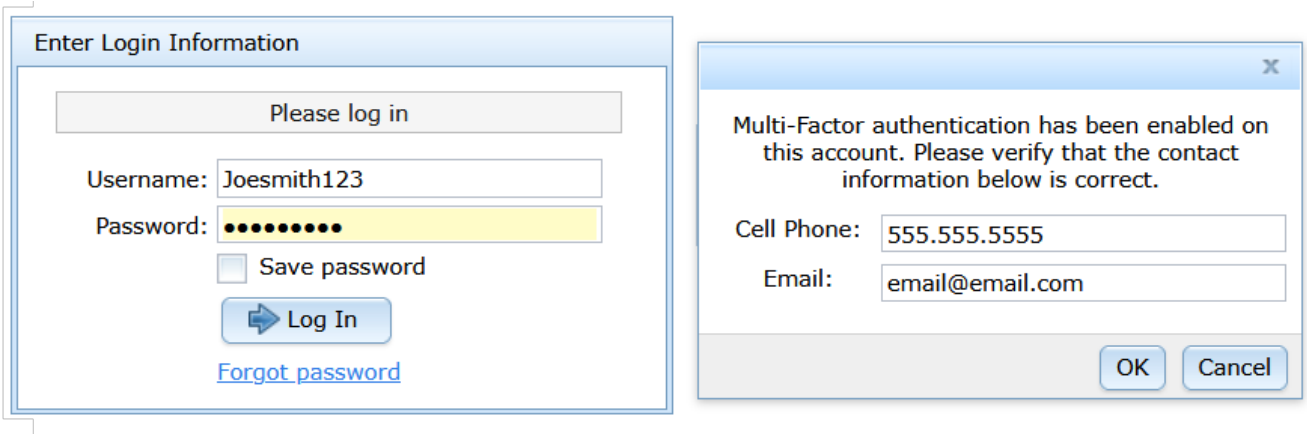


Q12: What will Users/Clients see when they log in for the first time when the Primary Method is Authenticator App? Top

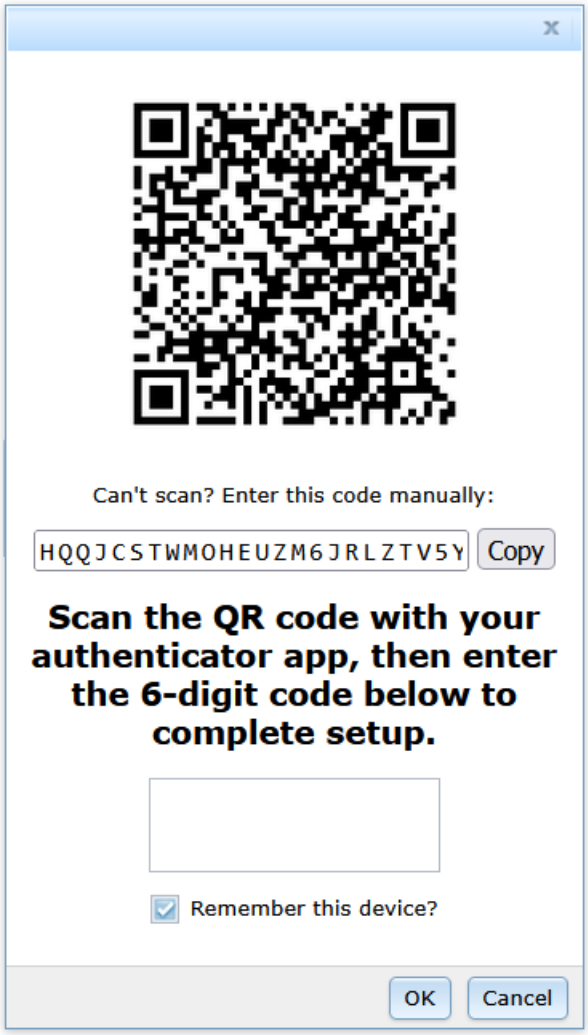
When MFA is enabled and the Primary Method is Authenticator App, the first login looks like this:

Log in and begin verification

Users/Clients enter their username and password, then are prompted to verify their cell phone and/or email



Once 'OK' has been clicked, then they are prompted to set up and verify using the authenticator app on the next screen.



- **Scan the QR code**
  - A QR code is displayed on the screen.
  - Clients open their authenticator app and scan the QR code to add the account.
- **Enter the security code**
  - Once the account is added, the authenticator app generates a time-based security code.
  - The code refreshes automatically at regular intervals.
  - After entering the code, users/clients proceed as normal.

Q13: What happens if I can't access my authenticator app and don't have a backup method set up? Top

If you cannot access your authenticator app and do not have email backup enabled, you will not be able to log in. In this situation, please contact your Master User on the account for assistance.

To help prevent this, all users are prompted to verify their contact information upon first login after MFA is enabled and should ensure an email address is on file.