

# CCH iFirm Learning Portal

## Resetting User Passwords

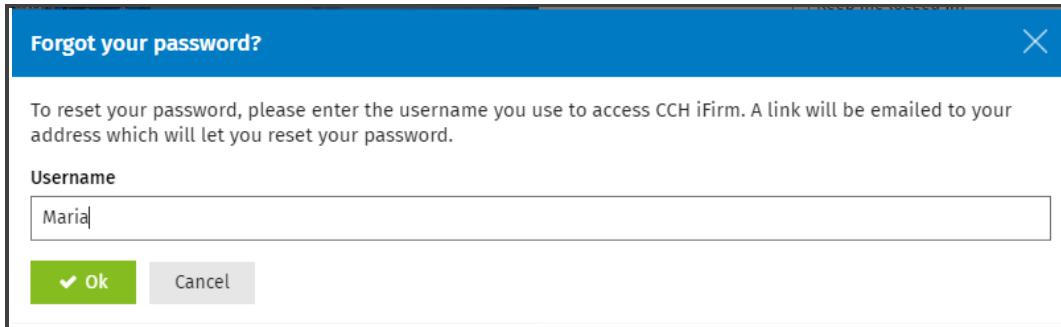
If a user forgets his or her password, there are two methods of you can use to reset the password. The first method can be used for either the Admin user, or a general user password.

To reset a password from the Login screen:

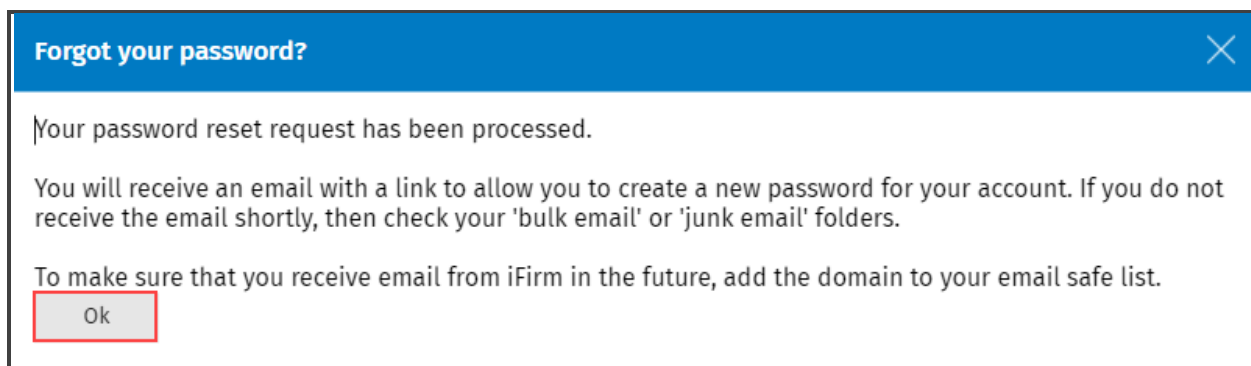
1. Navigate to your CCH iFirm website.
2. From the Login screen, click the **Forgot your password?** link.



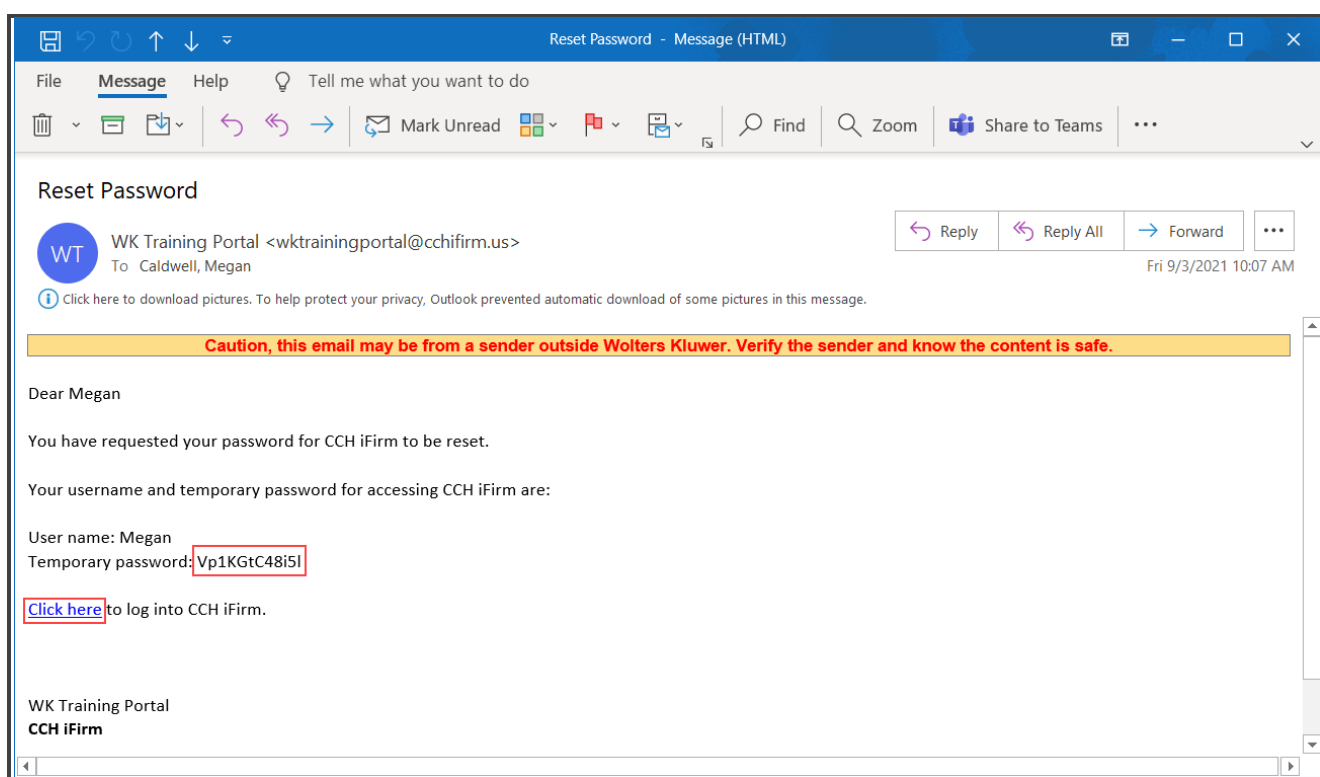
3. CCH iFirm displays the Forgot your password dialog box. Type the user's name you need to reset, and then click **OK**.




4. CCH iFirm confirms the password reset request was processed. The user will receive an email containing a temporary password. Click **OK** again.

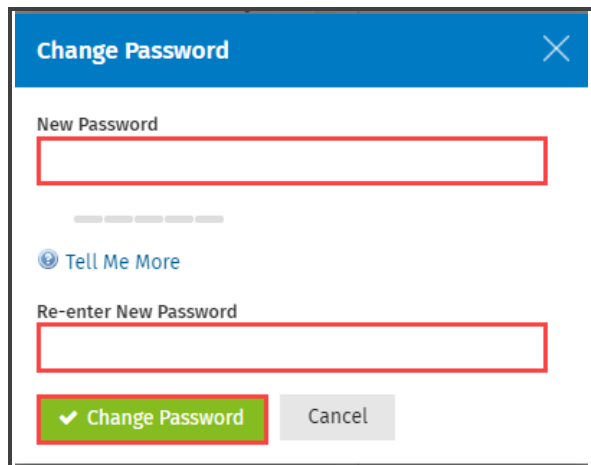


5. Open the email. Locate and copy the temporary password. Click the link to access the Login screen.



6. On the Login screen, enter the username and the temporary password. Click **Login**.
7. CCH iFirm displays a Change Password dialog box. Passwords should meet at least three of these requirements:
- Has at least eight characters
  - Has at least one numeral (0-9)
  - Has at least one capital letter (A – Z)
  - Has at least one lower case letter (a – z)
  - Has at least one symbol (!@#\$%^&\*-\_+=|;:/>~)
-  You will be prompted to change your password every 90 days.

8. Enter and re-key your new password, and then click **Change Password**.



A screenshot of a 'Change Password' dialog box. The dialog has a blue header with the title 'Change Password' and a close button (X). Below the header, there are two text input fields. The first field is labeled 'New Password' and the second is labeled 'Re-enter New Password'. Both fields are outlined with a red border. Between the two fields is a 'Tell Me More' link with a question mark icon. At the bottom of the dialog, there are two buttons: a green button with a checkmark icon and the text 'Change Password', and a grey button with the text 'Cancel'.

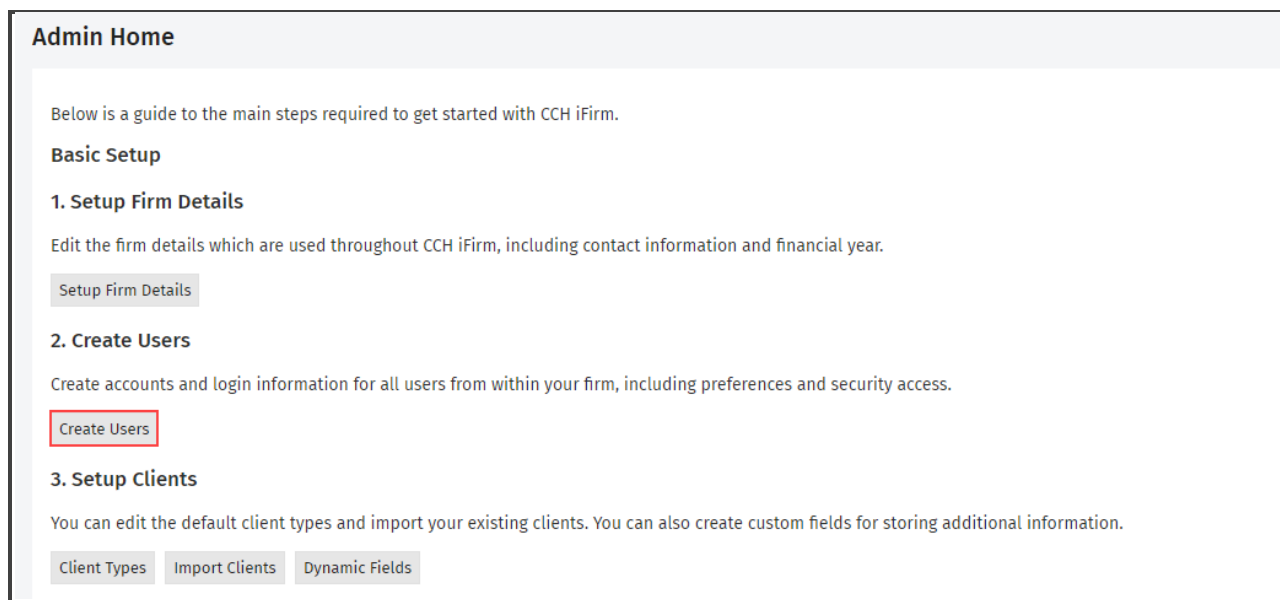
9. You can now use the new password to log into CCH iFirm.

## Admin User Resets User Password

If you are the Admin user, you can reset other users' passwords.

To do this:

1. Login as the Admin user. From the Admin Home screen, click **Create Users**.



A screenshot of the 'Admin Home' screen. The title 'Admin Home' is at the top. Below the title, there is a paragraph: 'Below is a guide to the main steps required to get started with CCH iFirm.' This is followed by a section titled 'Basic Setup'. Under 'Basic Setup', there are three numbered steps: '1. Setup Firm Details', '2. Create Users', and '3. Setup Clients'. Each step has a brief description and a button. For '1. Setup Firm Details', the button is 'Setup Firm Details'. For '2. Create Users', the button is 'Create Users' and it is highlighted with a red border. For '3. Setup Clients', the buttons are 'Client Types', 'Import Clients', and 'Dynamic Fields'.

2. From the User Manager screen, select the user whose password you want to reset.

**User Manager**

+ Add User Manage Profiles

All Active Inactive

Q Search

Deactivate

<input type="checkbox"/>	User	First Name	Last Name	Time Entry mode	Hourly Chargeout Rate	Standard Weekly Hours
<input type="checkbox"/>	Admin	Administrator		Units	0.00	0.00
<input type="checkbox"/>	Megan	Megan	Caldwell	Actual Time	0.00	0.00
<input type="checkbox"/>	Smith	Georgia	Smith	Actual Time	0.00	0.00
<input type="checkbox"/>	UserMaria	General	User	Units	0.00	0.00

1 - 4 of 4 results

50 1

- On the Edit User page, click **Reset Password**.

**Edit User - General User**

Login As User Reset Password

Details Profile Security

User Name UserMaria

First Name General

Last Name User

Email Address [redacted]

Default number of items on Page 200

Contacts Sort Order

- CCH iFirm displays the User password reset dialog box letting you know that the user password has been reset. Click **OK**.

**User password reset**

User password reset.

Ok

- CCH iFirm sends an email containing a temporary password to the email address on file for this user. The user can follow the same steps as previously discussed to login with the temporary password and create a new one.

## Reset Password Inbox x



**WK iFirm Training** <wktraining@cchifirm.us>


to me ▾

Dear General

Your password has been reset for CCH iFirm.

Your username and temporary password for accessing CCH iFirm are:

User name: UserMaria

Temporary password: 

[Click here](#) to log into CCH iFirm.

Please note that when you log into CCH iFirm you will be required to create a new password.

WK iFirm Training  
CCH iFirm