

CCH iFirm Learning Portal

Log into CCH iFirm as a Admin

To access CCH iFirm, locate the email with the subject **Welcome to CCH iFirm!** This email contains your CCH Firm URL, username, and initial password.

To log in:

1. Click your site URL or copy and paste it to the address bar of your browser.
2. CCH iFirm displays the login page for your site. Enter *Admin* as the username and the temporary password from the Welcome email.
3. Click **Login**.

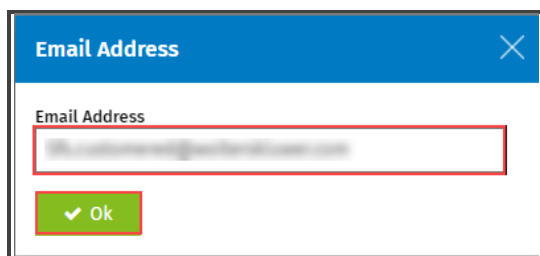


The screenshot shows a login form with the following elements:

- Title: Sign In...
- Username field: Admin
- Password field: Masked with dots
- Checkbox: Keep me logged in?
- Link: [Forgot your password?](#)
- Button: Login

i Do not use the Forgot your password? link unless you have already login for the first time. If you are unable to locate your Welcome email, please contact support for assistance.

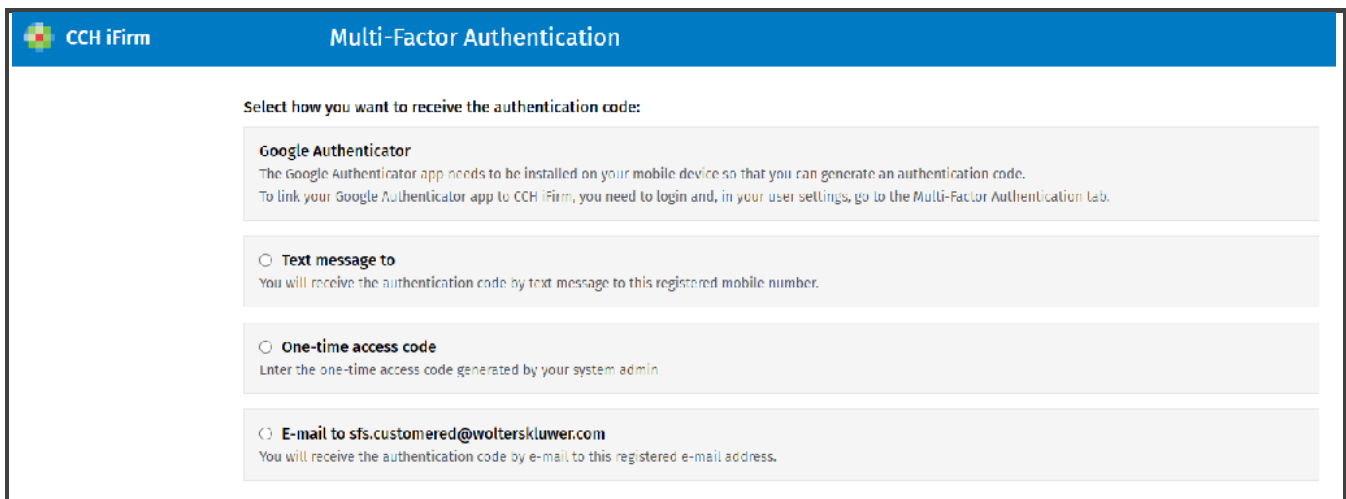
4. The first time you log in as the admin user, you will be prompted to enter the email address you will use for this user. Enter the email address and click **OK**.



The screenshot shows a dialog box with the following elements:

- Title: Email Address
- Text input field: Email Address
- Button: Ok

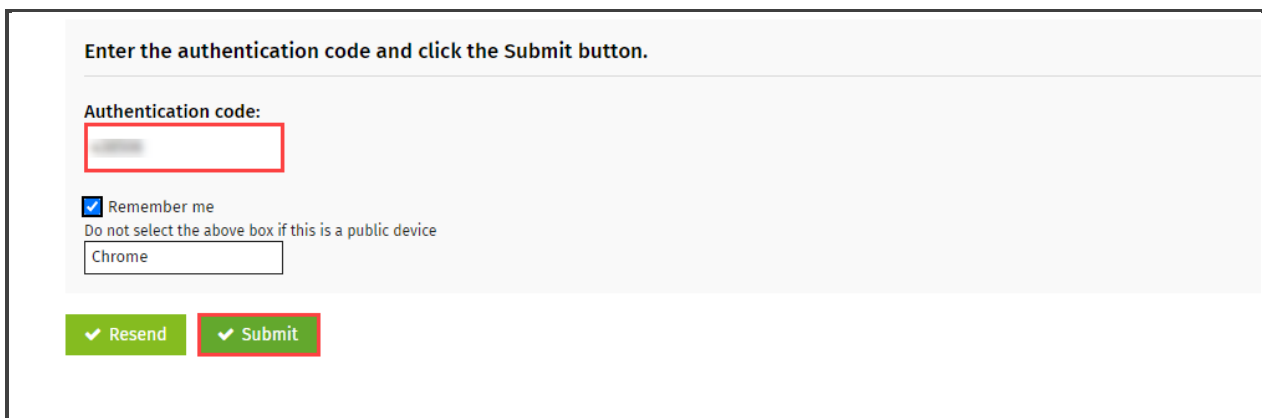
5. CCH iFirm displays the Multi-Factor Authentication options. The options you see are:
- **Google Authenticator** – The Google Authenticator app needs to be installed on your mobile device so that you can generate an authentication code. To link your Google Authenticator app to CCH iFirm , you need to Login and in your user settings, go to the Multi-Factor Authentication tab. The Admin user currently cannot use this option to authenticate.
 - **Text message** – You will receive the authentication code by text message to this registered mobile number. The Admin user currently cannot use this option to authenticate at this time.
 - **One-Time access code** – Enter the one-time access code generated by your system admin.
 - **Email to** – You will receive the authentication code by e-mail to this registered e-mail address.
6. Select the option you want to use. For this lesson, select the Email to Option, and click **Proceed**.



The screenshot shows the 'Multi-Factor Authentication' page in the CCH iFirm system. The page title is 'Multi-Factor Authentication' and the header includes the CCH iFirm logo. Below the header, there is a section titled 'Select how you want to receive the authentication code:' with four radio button options:

- Google Authenticator**
The Google Authenticator app needs to be installed on your mobile device so that you can generate an authentication code. To link your Google Authenticator app to CCH iFirm, you need to login and, in your user settings, go to the Multi-Factor Authentication tab.
- Text message to**
You will receive the authentication code by text message to this registered mobile number.
- One-time access code**
Enter the one-time access code generated by your system admin
- E-mail to sfs.customered@wolterskluwer.com**
You will receive the authentication code by e-mail to this registered e-mail address.

7. CCH iFirm displays the Authentication Code fields. Enter the authentication code you received and click **Submit**.



The screenshot shows the 'Enter the authentication code and click the Submit button.' section of the CCH iFirm system. It features a text input field for the 'Authentication code:' which is highlighted with a red box. Below the input field, there is a checked checkbox for 'Remember me' with the instruction 'Do not select the above box if this is a public device'. A browser selection dropdown menu is visible, currently showing 'Chrome'. At the bottom of the form, there are two buttons: a green 'Resend' button and a red 'Submit' button, both highlighted with red boxes.

8. CCH iFirm displays the Subscription Agreement. Read through terms and conditions and acknowledge you have by selecting the checkbox at the bottom of the page. Once done, click **Accept**.

Terms & Conditions

CCH iFirm Application Subscription Agreement
 BY CLICKING "I ACCEPT" AT THE END OF THIS CCH iFIRM APPLICATION STANDARD SUBSCRIPTION AGREEMENT (THIS "AGREEMENT") OR BY INSTALLING, ACCESSING, OR USING ANY PART OF THE HOSTED APPLICATION (AS DEFINED BELOW), YOU ACKNOWLEDGE THAT YOU HAVE CAREFULLY REVIEWED THIS AGREEMENT, THAT YOU UNDERSTAND IT AND ITS TERMS AND CONDITIONS, AND THAT YOU KNOWINGLY AND VOLUNTARILY AGREE TO BE LEGALLY BOUND BY IT AND ITS TERMS AND CONDITIONS. IF YOU DO NOT AGREE WITH THIS AGREEMENT, YOU ARE NOT GRANTED PERMISSION BY CCH SFS TO INSTALL, ACCESS, OR OTHERWISE USE THE HOSTED APPLICATION. IN SUCH CASE, PLEASE CLICK "I REJECT" AND PROMPTLY CEASE USE OF THE HOSTED APPLICATION AND DELETE ANY MATERIALS RELATED TO THE HOSTED APPLICATION THAT YOU HAVE RECEIVED FROM CCH SFS OR THAT YOU HAVE IN YOUR POSSESSION.

CCH iFirm Application Standard Subscription Agreement

This CCH iFirm Application Standard Subscription Agreement (this "Agreement") is made by and between Universal Tax Systems, Inc. d/b/a CCH Small Firm Services ("CCH SFS"), and "Customer" (as defined below), and governs Customer's use of the Hosted Application (as defined below). This Agreement may be viewed at CCH SFS' web site (www.cchfs.com/legal/ or <https://taxna.wolterskluwer.com/legal/>), during Customer's initial access of the Hosted Application, or within the Hosted Application via a link. By accessing the Hosted Application or by otherwise indicating acceptance (electronically or otherwise) of this Agreement, Customer acknowledges agreement to the terms set forth below.

1. **DEFINITIONS.** Capitalized terms used but not defined elsewhere in this Agreement shall have the respective meanings set forth below:

1.1. **"Affiliate"** means with respect to an entity party to this Agreement, any entity which, directly or indirectly, controls, is controlled by or is under common control with such party, where control means the ability to direct the affairs of an entity through ownership of voting interest, contract rights or otherwise.

1.2. **"Authorized User"** means an individual who is authorized by Customer to access or use the Hosted Application. An Authorized User must be a full-time or part-time employee (but may be a contract/temporary employee) working for Customer primarily out of Customer's office(s) (including remote users assigned to such office(s)) for the purpose of assisting Customer in its day-to-day business activities.

1.3. **"Client"** means any third party client of Customer that has entered into a direct agreement with Customer for accounting, payroll or tax services.

1.4. **"Customer"** means the person or entity identified in the "Customer Information" section of the Order Confirmation(s).

1.5. **"Customer Data"** means all data, information, records, or files that are uploaded to, entered in, or stored on the Hosted Application by or on behalf of the Customer. Customer Data does not include any Statistical Data (as defined below).

1.6. **"Fees"** means the amounts payable by Customer to CCH SFS under the Order Confirmation(s) and this Agreement.

I have read and agree to these terms and conditions

9. The first time you log in, CCH iFirm requires that you change your password.

10. 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.

11. Change the temporary password to a password of your choice and click **Change Password**.

Change Password ✕

New Password

.....

 [Tell Me More](#)

Re-enter New Password

✔ Change Password
Cancel

12. CCH iFirm displays the Admin Home screen.

