



Tax & Accounting

**Professional and
Client Services**

CCH Axcess™ Portal

Training & Consulting Courses

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Timeline

Our Professional and Client Services department will be ready to get you up and running with our solutions. You can expect the following:

- You will be assigned a team of professionals that will work with you throughout the process to meet all implementation objectives
- A full implementation plan will be developed with milestones and tracking

CCH Axxess™ Portal Implementation Timeline



Illustration is intended to provide general guidance; actual implementation time is dependent on many factors.

It is recommended you work with your Solutions Consultant to determine the optimal plan for your office.

Role Based Training

Most of our training is role based; this means that training is provided in the context of a specific role, including what it takes to perform that role. For example, administrators will need to learn how to perform different functions in the solution than end-users. So, consider which staff members need to learn how to perform that role in the solution when looking at a course.

We've divided the training and consulting courses into these roles:

- Champions Team
- End User

Course Delivery Methods

The Delivery Method is the way course content is conveyed from software consultant to students.

One-on-One On-site

Our One-on-One On-site sessions provide an opportunity for a software consultant to come to your office and work in-person with your staff. There is something valuable in having a consultant come to your office. On-site training requires two consecutive days minimum per product. We will bill you for the consultant's travel costs.

One-on-One Web

With One-on-One Web, your staff interacts with a software consultant online, covering course material and following along as the consultant shares their screen. This is a best value if you need four or more staff trained on a course.

Webinar

In a webinar, you and staff from other offices are together in a live Consultant-led course held in a web meeting room. Webinars are scheduled on a pre-set day and time. These are also known as MTS sessions.

Self-Study (eLearning)

Self-Study is self-paced, online training that uses electronic media such as audio and video to connect your staff to course content on the internet. Staff have access to the Self-Study course for one year and can review the material repeatedly.

Setup Training

The CCH Axcess™ Portal (Portal) Setup Training course focuses on the product's core settings so that you and your clients can begin working with Portal as quickly as possible. Portal is designed to facilitate client collaboration in a secure environment. As more and more regulatory bodies begin to dictate the ways in which sensitive information may be transmitted electronically, solutions like Portal become invaluable to accounting firms and other professional service organizations. By taking advantage of this solution, you will increase efficiency and take client collaboration to the next level.

Course Objectives

- Understand client system considerations, user perspectives and roles in Portal
- Create and manage portals, folder templates, firm users, and portal users
- Edit email notifications
- Locate and understand the account information in Portal
- Understand the integration with Document

Delivery Methods and CPE

- One-on-One Onsite: Computer Software & Applications – 2 credit hours
- One-on-One Web: Computer Software & Applications – 2 credit hours
- Self-Study: Computer Software & Applications – 1 credit hours

Who Should Attend?

- The Portal Champions Team
- Role: Champions Team

Program Information

- Program Level: Basic
- Prerequisites: None
- Advanced Preparation: None
- Read Policies

Best Practices Consulting

This course is designed to assist firms in using CCH Access™ Portal (Portal) with taking client collaboration to the next level. We will focus on best practices for implementing Portal while also stressing the key components of on-going maintenance. Particular attention will be paid to the importance of developing a solid plan for rolling out the Portal to your clients. By taking advantage of the solution's more advanced features and developing standardized policies and procedures, firms of all sizes and specialties may increase across the board and truly take client collaboration to the next level.

Course Objectives

- Understand the best practices for Portal creation, management, and everyday usage
- Develop and implement a plan for rolling out Portal to clients
- Outline firm-specific policies and procedures for Portal

Delivery Methods and CPE

- One-on-One Onsite: Computer Software & Applications – 4 credit hours
- One-on-One Web: Computer Software & Applications – 1 credit hour

Who Should Attend?

- The Portal Champions Team
- Role: Champions Team

Program Information

- Program Level: Basic
- Prerequisites: If conducted over the web, CCH Access Portal Setup Training. If Onsite, none
- Advanced Preparation: None

End User Training

This course provides introductory training on CCH Axcess™ Portal (Portal). Portal is a quick and secure file exchange application that integrates seamlessly with CCH Axcess™ Document (Document). This course will cover basic functions and features for using portal in the accounting firm environment.

Course Objectives

- Understand how Portal integrates with Document
- Publish files to Portal from Document. And unpublish them from Portal
- Approve files into Document that were uploaded to Portal by the client
- Understand the client's perspective of Portal

Delivery Methods and CPE

- One-on-One Onsite: Computer Software & Applications – 1 credit hour
- One-on-One Web: Computer Software & Applications – 1 credit hour
- Self-Study: Computer Software & Applications – 1 credit hour

Who Should Attend?

- New CCH Axcess™ Portal users
- Role: End User

Program Information

- Program Level: Basic
- Prerequisites: None
- Advanced Preparation: None
- Read Policies

Appendix: Course Tables of Contents

For more details on what topics are covered in each course the table of contents from the handout for each course is included in this appendix.

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