

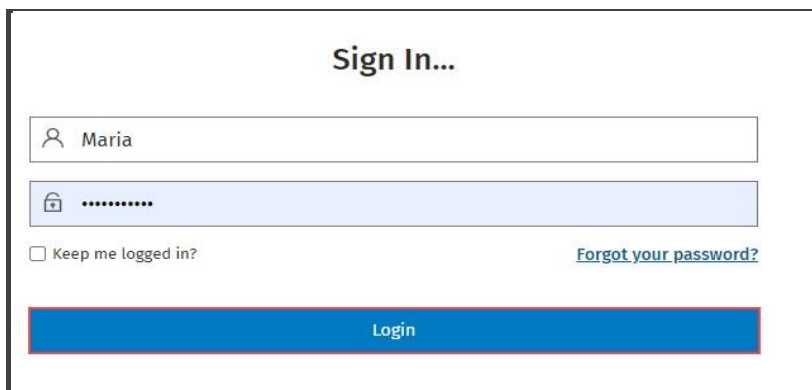
CCH iFirm Learning Portal

Log into CCh ifirm as a General User

To access CCH iFirm, locate the email with the subject **CCH iFirm User Account**. 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 your username and the temporary password from the *CCH iFirm User Account* email.
3. Click **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 CCH iFirm User Account email, reach out to your Admin user for assistance.
4. 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.
 - Email to** – You will receive the authentication code by e-mail to this registered e-mail address.

- **Text message** – You will receive the authentication code by text message to this registered mobile number. This option will only work if your mobile number was entered as part of your User Profile.
 - **One-Time access code** – Enter the one-time access code generated by your system admin.
5. Select the option you want to use. For this lesson, select the Email to Option, and click **Proceed**.

The screenshot shows the CCH iFirm Multi-Factor Authentication interface. At the top, there is a blue header with the CCH iFirm logo on the left and the text "Multi-Factor Authentication" on the right. Below the header, the main content area is titled "Select how you want to receive the authentication code:". There are four radio button options listed in a light gray box. The first option is "Google Authenticator" with a sub-note: "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 second option is "E-mail to sfsxxxxxxxxxxxx@woxxxxxxxxxxxxxxx" with a sub-note: "You will receive the authentication code by e-mail to this registered e-mail address." The third option is "Text message to +1 xxxxxx9017" with a sub-note: "You will receive the authentication code by text message to this registered mobile number." This option is selected with a blue radio button. The fourth option is "One-time access code" with a sub-note: "Enter the one-time access code generated by your system admin".

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

The screenshot shows the CCH iFirm Authentication Code entry screen. At the top, there is a light gray header with the text "Enter the authentication code and click the Submit button.". Below the header, the main content area is titled "Authentication code:". There is a text input field with a red border. Below the input field, there is a checkbox labeled "Remember me" which is checked. Below the checkbox, there is a sub-note: "Do not select the above box if this is a public device". Below the sub-note, there is a text input field with the value "Chrome". At the bottom of the form, there are two buttons: a green button labeled "Resend" and a red button labeled "Submit".

7. 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.cchsfs.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

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

9. 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 (!@#\$%^&*-_+=|;:/>~)

i You will be prompted to change your password every 90 days.

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

Change Password [X]

New Password

.....

[Tell Me More](#)

Re-enter New Password

11. CCH iFirm displays the Dashboard.

The screenshot displays the CCH iFirm Dashboard for user Maria Rangel. The dashboard is organized into several sections:

- Missing and Incomplete Timesheets:** A table showing timesheet data for various days in May and April 2022.

Day	Date	Standard	Recorded	Missing
Thursday	May 05 2022	8.00	0.00	8.00
Wednesday	May 04 2022	8.00	0.00	8.00
Tuesday	May 03 2022	8.00	0.00	8.00
Monday	May 02 2022	8.00	0.00	8.00
Friday	Apr 29 2022	8.00	0.00	8.00
Thursday	Apr 28 2022	8.00	0.00	8.00
Wednesday	Apr 27 2022	8.00	0.00	8.00
Tuesday	Apr 26 2022	8.00	0.00	8.00
Monday	Apr 25 2022	8.00	2.75	5.25
Friday	Apr 22 2022	8.00	0.00	8.00
- Top 10 Current Resource Allocation Variances:** A table showing resource allocation for Maria Rangel.

Name	Hours Allocated	Hours Worked	Variance	Percentage
Maria Rangel	2.00	3.25	1.25	62.50
Maria Rangel	3.00	3.00	0.00	0.00
- Top 10 Overdue Jobs:** A table listing overdue jobs with their status.

Job	Client	Target End Date	Job Status
ACC Jan 31 2022	Ali, Deed	Feb 19 2022(-75)	Allocated
ACC Jan 31 2022	Banks, Billy	Feb 19 2022(-75)	Allocated
ACC Jan 31 2022	Ambrose, Samuel	Feb 19 2022(-75)	Allocated
ACC Jan 31 2022	Barnes, Nick	Feb 19 2022(-75)	Allocated
ACC Jan 31 2022	AVELAR, GONZALO	Feb 19 2022(-75)	Allocated
BKK Feb 28 2022	Barnes, Nicholas	Mar 15 2022(-91)	Not yet in
T1040 Dec 31 2021	Jameson, Odin	Mar 15 2022(-91)	Allocated
T1040 Dec 31 2021	Caldwell, Megan	Mar 15 2022(-91)	Not yet in
T1040 Dec 31 2021	Hammer, Thor	Mar 15 2022(-91)	Not yet in
T1040 Dec 31 2021	Smith, Christian	Mar 15 2022(-91)	Not yet in
- My Ordered Jobs:** A table showing one ordered job.

Job	Client	Job Status
ACC Jan 31 2022	Ali, Deed	Allocated
- Recently Bounced Emails:** A table showing bounced emails.

Date Sent	Name	Category
Apr 21 2022	Brown, Glen	Statements
Apr 21 2022	Andrews, Diane	Statements
Apr 21 2022	Ashton Engineering	Statements
Apr 20 2022		Internal
Apr 20 2022		Internal
Feb 25 2022	Andrews, Diane	Statements
Feb 25 2022	Ashton Engineering	Statements

The footer of the dashboard contains the text: "CCH iFirm 2021.40.54711 - Copyright 2022 Wolters Kluwer. All rights reserved."