

# CCH Access™ Portal/CCH Client Access

## Welcome to CCH Access Portal 2016-4.1/CCH Client Access 2.1

This bulletin provides important information about the 2016-4.1 release of CCH Access Portal and the 2.1 release of CCH Client Access. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

### New in this Release: CCH Client Access (Web Interface)

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The CCH Client Access Web interface has been updated for desktops, tablets, and smartphones. The native iOS® and Android™ apps have not yet been updated to include the changes listed below. Our focus in this release is the firm user experience through the Web browser.

As a reminder, the URL for Client Access is <https://www.clientaccess.com>. Your clients can log in here using their existing CCH Access Portal credentials. We recommend this interface for all clients, especially those who access Portal from an Apple® Mac® computer or the Google Chrome™ browser.

Clients can also access Portal on Android™ and iOS® devices using the Client Access Web interface through their device's web browser. Staff members of firms that use the standalone version of Portal (that is, not integrated with CCH Access™ Document) can also log in to Client Access using their existing Portal credentials. However, many firm administration features are not yet available in Client Access, and those features must still be accessed through the Microsoft® Silverlight® interface. Staff members of firms using Portal integrated with Document can continue to access Portal through Document, while their clients can use the new Client Access interface.

**Note:** To ensure that your clients have the most secure, full-featured, and browser/device-agnostic interface, we will disable the non-Silverlight® Simplified User Interface (SUI) in November 2017 with the 2016-5.0 release. The Silverlight® Portal interface for client users will be disabled in the summer of 2018. Firm users will continue to use the Silverlight® Portal until all firm administrative capabilities are available in Client Access.

#### Management & Settings

A new Management & Settings page has been added to Client Access for Standalone Portal. Management & Settings is currently available to firm admins and firm users with full rights permissions only. To access Management & Settings on your desktop application, click the gear icon in the top right-hand corner.

#### Sign-in & Security

A new Sign-in & Security section has been added to the Management & Settings page for Standalone Portal. This section allows you to control firm-level security for your portals, such as 2-Step Verification.

#### 2-Step Verification (a.k.a. Multi-Factor Authentication)

Client Access now offers 2-Step Verification for the firm and client users logging into Client Access. 2-Step Verification is available in this release for firms with Standalone Portal. 2-Step Verification for Integrated Portal will be available in the November release for your clients. With 2-Step Verification enabled, the following changes occur:

- When creating new portals or users, your client will now receive only one email with a registration link, instead of three emails previously sent (New Portal Created, New User Welcome Email 1, and New User Welcome Email 2).

- Using the email address or phone number(s) on file in the Portal user profile, users will choose to receive a one-time passcode via email, SMS text message, or by a voice call.
- Users will be required to enter the correct one-time passcode in the Portal interface within five minutes, and can then create their own password.
- Users will go through this verification process:
  - When logging in from a new device or from a new web browser on a registered device
  - When logging in more than 90 days after their last verification
  - When going through the Forgot Password process to reset their password
- Security questions and answers are no longer used or required when 2-Step Verification is enabled.

Your firm admin in the Standalone Portal can enable 2-Step Verification in the Sign-in & Security section in Client Axxess. Once enabled, 2-Step Verification is available for all users logging into Client Axxess from any device.

**Note:** Once 2-Step Verification is enabled by the firm admin, it cannot be reversed back to the standard login.

#### **Why is 2-Step Verification important?**

We've all heard stories of stolen identities, and we know that some criminals even file taxes using stolen identities, to collect tax refunds from the IRS. Then when the real taxpayer files his or her taxes, the IRS rejects it as a duplicate, creating a major headache for the taxpayer who must now prove that he or she is the true taxpayer. According to CBS News, the IRS estimates it paid \$5.8 billion in refunds on returns in 2013 that it later found to be fraudulent.

2-step verification provides an extra layer of security to confirm your claimed identity by utilizing two different components, which helps ensure that your clients' tax data is safe and secure. This is also referred to as two-factor or multi-factor authentication.

You may not realize it, but you and your clients have probably been using two-factor authentication, or 2-step verification in your everyday life for many years.

Consider the automated teller machine, also known as an ATM. When you wish to withdraw money from your bank account using an ATM, there are multiple steps to verify your identify. The first factor is something you possess – your bank card. The second factor is something you know, your personal identification number or PIN. Only the correct combination of your bank card (something that the user possesses) and your correct PIN number (something that user knows) allows the transaction to be carried out.

For more information and an introductory video on 2-Step Verification, [click here](#).

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### **New in this Release: CCH Axxess Portal (Microsoft® Silverlight® Interface)**

Minor updates only in this release.

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### **Known Issues**

With Mozilla Firefox version 52.0 (released on March 7, 2017) support for Netscape Plugin API (NPAPI) plugins other than Flash has been suspended. Silverlight®, Java, Adobe® Acrobat® and others are no longer supported. To access the Silverlight® version of CCH Axxess Portal, you must use Internet Explorer®.