

CCH Access™ Portal/CCH Client Access

Welcome to CCH Access Portal 2016-5.0/CCH Client Access 2.2

This bulletin provides important information about the 2016-5.0 release of CCH Access Portal and the 2.2 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)

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 old non-Silverlight® Simplified User Interface (SUI) in November 2017 with this release. The Silverlight® Portal interface for client users is tentatively planned to 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.

Preview Release - Electronic Payments (ePay)

We are excited about a new feature in CCH Access™ Practice that will allow your clients to securely pay their invoices online using Client Access. Payment can be made from any of your clients' devices. When you publish an invoice to your clients' portals in Client Access with ePay configured in CCH Access™ Practice, your clients will see a Pay Now button allowing the payment to be made online.

If you are interested in previewing ePay, please open a [support case](#) requesting the ePay preview. Please include the payment service provider you are currently using. If you do not currently license CCH Access™ Practice or Portal/Client Access, please contact your sales representative.

Engagement Organizer [BETA]

If your firm is licensed for CCH ProSystem fx Engagement and CCH Access™ Portal or CCH Access™ Document with Integrated Portal, a hyperlink to the beta version of Engagement Organizer will be available in your clients' portals in the Client Access interface. Click [here](#) to learn more about benefits of the Engagement Organizer.

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

Client Access now offers 2-Step Verification for all users logging into the Client Access interface. **To best protect your clients from identity theft or fraudulent tax returns being filed, we strongly encourage you to enable 2-Step Verification.**

This feature is available to all firm and client users of Standalone Portal and for all client users of firms using Document with Integrated Portal. 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 in new user and forgotten password scenarios.
- 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.

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

Setting up 2-Step Verification in Standalone Portal

Your default firm admin can enable 2-Step Verification in the Sign-in & Security section under the Management & Settings menu (gear icon) in Client Access.

Setting up 2-Step Verification in Document with Integrated Portal

Your default firm admin can enable 2-Step Verification in the **Configurations** screen located in the Dashboard > Firm Settings and Defaults > Portal section.

Once enabled, 2-Step Verification is available for all users logging into Client Access from any device. For more information, please refer to the 2-Step Verification help topic.

Note: Once 2-Step Verification is enabled by the default 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.

[New in this Release: CCH Access Portal \(Microsoft® Silverlight® Interface\)](#)

Hyperlink to CCH Client Access Home Page

A hyperlink to the CCH Client Access Portal Home Page is available to firm staff users in the Microsoft® Silverlight® Interface in the Administration section under the Manage Portal tab. Select the Client Access option under Manage Portal to be taken directly to the Client Access Home Page where you can create, edit and view your portals in the Client Access interface.

Fixed in this Release

Temporary Password Email Notification

The three-minute timed delay has been removed from the temporary password email notification for Standalone Portal and Document with Integrated Portal. Users logging in with the standard login will receive the temporary password email notification immediately after their portal account has been created.

Share Safe - File Access Key Email Notification

The one-minute timed delay has been removed from the Share Safe File Access Key email notification in Document. Users will receive the File Access Key email notification immediately after the files have been sent with Share Safe.

Integrated Portal - Deleting a Custom Folder

Resolved the error when deleting a custom folder in Document with Integrated Portal that was migrated during the portal conversion process from Standalone Portal.

Integrated Portal - Request Clarification Sender Email Address

When approving a file in Document with Integrated Portal, the Request Clarification email notification now properly displays the sender's email address.

Standalone Portal - Saving Access Groups in Silverlight

The timeout issue has been resolved when saving Access Groups in the Standalone Portal Silverlight interface.

Standalone Portal - Sorting User's data in Client Axxess

In Client Axxess, the Manage Portal > Firm and Client Users tab now sorts the data with mixed case.

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®.