

CCH Access™ Portal/CCH Client Access

Welcome to CCH Access Portal 2017-1.0/CCH Client Access 2.2

This bulletin provides important information about the 2017-1.0 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 Access Portal (Microsoft® Silverlight® Interface)

New Login Screen

The CCH Access™ Portal (Microsoft® Silverlight® Interface) has an updated login screen with the same look and feel as the CCH Client Access login screen. After verifying you entered valid portal credentials, you will be logged into the Silverlight interface.

Note: CCH Access™ Portal (Microsoft® Silverlight® Interface) is only available in the Microsoft® Internet Explorer web browser.

Important Security Feature Update

2-Step Verification (Multi-Factor Authentication)

As a reminder, 2-Step Verification is now available for all users logging into the CCH Client Access and the CCH Access™ Portal interfaces. In preparation for the coming Tax busy season and **to best protect your clients from identity theft or fraudulent tax returns being filed resulting from mishandled user credentials, we strongly encourage you to enable 2-Step Verification.**

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). The use of system-generated, temporary passwords is no longer required, which simplifies the new user registration process considerably for your clients.
- 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.
- New users or users going through the forgotten password process can then create their own password; otherwise, existing users are logged into their Portal account.
- Security questions and answers are no longer used or required when 2-Step Verification is enabled.
- 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

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.

Note: To reduce confusion for clients, once 2-Step Verification is enabled by the default firm admin, it cannot be reversed back to the standard login.

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

CCH Client Access (Web Interface)

There are no new updates in this release.

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 those who use any web browser other than Internet Explorer.

Find answers to your questions in our [Knowledge Base](#).

Please feel free to [Contact Us](#) online if you have any questions.