

CCH Access™ Portal/CCH Client Access

Welcome to CCH Access Portal 2017-2.1/CCH Client Access 2.3

This bulletin provides important information about the 2017-2.1 release of CCH Access Portal and the 2.3 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: Important Security Feature Update

Suspicious Login Detection with Safe Mode

CCH Access Portal/CCH Client Access is introducing a new feature that detects suspicious login behavior and will automatically put the user's account into **Safe Mode**. While in **Safe Mode**, a user cannot log into Portal without first verifying their identity using Portal's 2-Step Verification process. After a user account has been verified, the user account is unlocked and **Safe Mode** restrictions are lifted.

What's going on?

Due to the sensitive nature of the files stored in your CCH Access Portal account, and for the safety of your client data, if Portal detects unusual activity such as too many unsuccessful login attempts **or** too many incorrect answers to security questions, your user account will be locked to prevent unauthorized access. You will receive an email alert with instructions for unlocking your account.

What to do?

To restore your account access, you will be required to complete a brief identity verification process using 2-Step Verification using the link in your email. You will also be required to change your password after your identity has been verified.

If your account has been locked, you can also verify your identity with 2-Step Verification using Forgot Password from the login screen.

Note: This change applies to both firm users and client portal users. All user accounts locked with **Safe Mode** will be required to complete 2-Step Verification before regaining access to Portal, even if your firm has not enabled the 2-Step Verification firm setting.

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

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

Locked User Report

A new Locked User Report is now available to the Firm Admin and Firm Users with Full Rights permissions. To access the Locked User Report, click the gear icon in the top right-hand corner in the desktop application.

The Locked User Report displays the date/time the user account was locked and put into **Safe Mode**, the user's ID & name, device type, browser and IP address of all locked user accounts. The Locked User Report is also updated in real-time when the user verifies their identity with 2-Step Verification to regain access to Portal.

The Locked User Report can be exported to Microsoft® Excel® for analysis and printing.

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 Microsoft® Internet Explorer®.

New in this Release: CCH Access Portal (Microsoft® Silverlight® Interface)

Minor updates only in this release.

Fixed in this Release

Resending the welcome email

The temporary password is now sent when the firm resends the welcome email.

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

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