CCH Axcess™ Portal/CCH Client Axcess

Welcome to CCH Axcess Portal 2017-3.4/CCH Client Axcess 2.4

This bulletin provides important information about the 2017-3.4 release of CCH Axcess Portal and the 2.4 release of CCH Client Axcess. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

As a reminder, the URL for Client Axcess is https://www.clientaxcess.com. Your clients can log in here using their existing CCH Axcess 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.

Important Security Login Feature Update

2-Step Verification (Multi-Factor Authentication)
2-Step Verification has been enabled and is mandatory for all users logging into the CCH Client Axcess and the CCH Axcess™ Portal interfaces with this release for Standalone Portal and Document with Integrated Portal, to better protect your staff and clients from mishandled user credentials.

2-Step Verification is no longer a firm-configurable option and replaces the standard Portal login that uses the temporary password and security questions. To reduce confusion for clients, it cannot be reversed back to the standard login.

With 2-Step Verification, 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.

- Users will choose to receive a one-time passcode via the email address or phone number(s) in the Portal user profile.

  - **Note**: The options to receive the passcode via an SMS text message or by a voice call are only available if the user profile contains a phone number.

- 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 with 2-Step Verification.

- 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

For more information and an introductory video on 2-Step Verification, click here.

Prompt to Update User Profile with a Phone Number
For additional security, if a user logging into their portal does not have at least one phone number in their user profile, they will receive a prompt to add a phone number that can be used to receive the one-time verification passcode for 2-Step Verification.

CCH Client Axcess (Web Interface)

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

If you do not currently license CCH Axcess™ Practice or Portal/Client Axcess, please contact your sales representative.

CCH Axcess Portal (Microsoft® Silverlight® Interface)

Minor updates only in this release.

Find answers to your questions in our Knowledge Base.

Please feel free to Contact Us online if you have any questions.

CCH Axcess

2-Step Verification (Multi-Factor Authentication) for CCH Axcess
With the 2017-3.4 release, 2-Step Verification will be available as an optional setting for firm Administrators to configure in Firm > Settings and Defaults > Login Setup. 2-Step Verification applies to the CCH Axcess login mode and not the Active Directory or Federated Services login mode.

For more information, see our article and video on administrators enabling 2-Step Verification for your firm.

Important Note: With the initial release of 2-Step Verification in CCH Axcess, the default is a disabled state and the firm must opt-in to enable the option. Based on increased security requests by the various taxing jurisdictions, we will change the option default to be enabled and the firm must opt-out to disable the feature. This change will occur on the 2017-5.0 release in November, 2018.