CCH Axcess™ Portal/CCH Client Axcess

Welcome to CCH Axcess Portal 2017-5.0/CCH Client Axcess 2.6

This bulletin provides important information about the 2017-5.0 release of CCH Axcess Portal and the 2.6 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 Updates

2-Step Verification (Multi-Factor Authentication) has been enabled for the following features: Publish File to Portal (via SDK) and the Portal Plug-ins
If you are using the Standalone version of Portal, 2-Step Verification has been enabled and is mandatory for all firm staff users publishing files to Portal from other CCH applications, such as CCH Axcess Tax, CCH Axcess Practice, ProSystem fx Tax, and the Portal Plug-ins. 2-Step Verification is required for each of the CCH applications listed. This helps better protect your Portal data from mishandled user credentials.

With 2-Step Verification, the following changes occur when the firm staff user publishes a file to a client's portal:

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

  o **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.

- Firm staff users will be required to enter the correct one-time passcode within five minutes of being prompted in the 2-Step Verification screen while publishing a file to their client's portal.

- Firm staff users will go through this verification process after more than 90 days from their last verification in the CCH application.

- For additional security, the option to save your CCH Axcess credentials in the Portal Plug-ins has been removed. You will be prompted each time you upload a file from your Office product.

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

Coming Soon: Changes to the client user Portal login
To ensure that your clients have the most secure, full-featured, and browser/device-agnostic interface, we will disable the Silverlight® Portal interface for your clients in April 2019. After tax season, your clients will be redirected to the new Client Axcess interface of the Portal https://www.clientaxcess.com.

Firm users will continue to have access to the Silverlight® Portal until all firm administrative capabilities are available in Client Axcess.

Fixed in this Release

File Activity Report
In the Standalone Portal version in the Client Axcess interface, if a comma was present in the portal name or file name fields, the data was shifting to the next column when the File Activity Report was exported to Excel. This issue has been resolved. A comma will no longer shift the data to the next column in Excel.

Approver checkmark not saving in Standalone Portal
The approver checkmark was not saving when scrolling through the Firm User list in the Client Users section of a client's portal in the Standalone Portal version in the Client Axcess interface. This issue has been resolved.

Unable to re-create a deleted user
Resolved the issue related to a deleted user being in use. You will now be able to re-create a user that has been previously deleted in the Portal application.

Find answers to your questions in our Knowledge Base.

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