

CCH Access™ Portal/CCH™ Client Access

Welcome to CCH Access Portal 2019-4.1/CCH Client Access 3.2

This bulletin provides important information about the 2019-4.1 release of Portal and the 3.2 release of Client Access. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

Batch Portal Retention

The firm administrator can now change the portal file retention for multiple portals in a batch in the Client Access interface of the standalone version of Portal. To change Portal retention, log into the Client Access interface as the default firm administrator. Click the gear icon in the top right corner to open the Management & Settings screen. A new Portal Retention card has been added and is only available to the default firm administrator. A link with detailed instructions is also provided on the Portal Retention card.

The batch Portal retention feature exports a list of all your firm's portals, including the portal name, the current retention value, and the period type assigned at the portal level. Edit the retention value and period type in the exported portal list file, save it, and then re-import the list when completed. Portal applies the new file expiry retention value and period type at the portal, folder, and individual file levels. All files for the selected clients' portals will have their retention recalculated using this method.

Important Security Feature Updates

Safe Domain List for Firm Users

For added security, the safe domain list feature has been added to the standalone Portal application. It can be turned on from the Management and Settings screen in the Client Access interface. The safe domain list can be enabled or modified by the default firm administrator or a firm user with full rights. Once enabled, only the specified email address domains will be available for firm user creation and firm user login. All other non-specified firm user email address domains will be restricted, and these users will be prevented from logging into Portal.

A link is available in the safe domain list card for detailed instructions.

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

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