CCH Axcess™ Portal/CCH Client Axcess

Welcome to CCH Axcess Portal 2018-3.5/CCH Client Axcess 2.7

This bulletin provides important information about the 2018-3.5 release of CCH Axcess Portal and the 2.7 release of CCH Client Axcess. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

MY FILES is now Available for your Clients in Client Axcess
MY FILES (formerly known as Client Area in the Microsoft® Silverlight® Portal interface) is now available in the Client Axcess Portal interface, if your firm has purchased the Client Area Portal add-on feature.

MY FILES, which is only accessible by client users of the portal, provides a secure location for clients to upload files for review before submitting them to the firm.

To turn on MY FILES for your clients, first confirm that your firm has licensed the Client Area Portal add-on. Then, open your client's portal profile in your desktop version and select the "Enable MY FILES private storage area" option.

For more information on MY FILES (Client Area Add-on license), please contact your sales representatives.

Important Security Login Feature Updates

Changes to the Client User Portal Login
To ensure that your clients have the most secure, full-featured, and browser/device-agnostic interface, with this release, we have disabled the CCH Axcess Silverlight® Portal interface for client users. Your clients will automatically be redirected to the new Client Axcess interface of the Portal at https://www.clientaxcess.com.

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

2-Step Verification (Multi-Factor Authentication)
2-step verification has been enhanced with the following features:

- International phone numbers are now supported with 2-step verification.

- Identity verification using the Voice Message now requires the user to enter the one-time code to complete the 2-step verification login process.

For general information and an introductory video on 2-step verification, click here.

Fixed in this Release

Portal Name Already Exists

Resolved the message "Portal name already exists" when enabling a new client In the version of Portal that integrates with CCH Axcess™.

File Activity Report

The File Activity Report in the standalone version of Portal now includes all file activity for the 31st day when generated for months with 31 days.

Find answers to your questions in our Knowledge Base.

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