

CCH Access™ Portal/CCH Client Access

Welcome to CCH Access Portal 2018-5.0/CCH Client Access 2.9

This bulletin provides important information about the 2018-5.0 release of Portal and the 2.9 release of Client Access. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

Fixed in this Release

Portal Integrated with Document: Portal firm user access list

The portal firm user access list in Client Manager no longer includes the terminated or inactive staff members when updating the approver assignment.

Portal Integrated with Document: Updating portal user assigned roles

Changes made to the default security user role in the Personal Information section of the Edit Portal User screen now properly display in the Portal Access and Security section.

Known Issues

Client Access: Firm-wide User Access List Report

When running the firm-wide User Access List report a failure can occur during the report generation. If you encounter a failed status, please contact our support department and submit a request for the report to be sent to you.

Changes made to the default security user [More Information](#)

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

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