

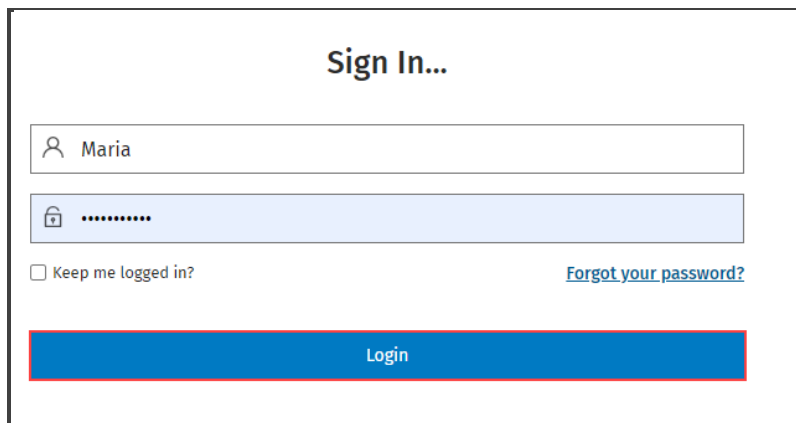
CCH iFirm Learning Portal

Log into CCH iFirm as a General User

To access CCH iFirm, locate the email with the subject **CCH iFirm User Account**. This email contains your CCH iFirm URL, username, and initial password.

To log in:

1. Click your site URL or copy and paste it to the address bar of your browser.
2. CCH iFirm displays the login page for your site. Enter your username and the temporary password from the **CCH iFirm User Account** email.
3. Click **Login**.



Sign In...

⦿ Maria

🔒

Keep me logged in? [Forgot your password?](#)

Login

- i** Do not use the Forgot your password? link unless you have already login for the first time. If you are unable to locate your CCH iFirm User Account email, reach out to your Admin user for assistance.
4. CCH iFirm displays the Multi-Factor Authentication options. The options you see are:
 - **Google Authenticator** – The Google Authenticator app needs to be installed on your mobile device so that you can generate an authentication code. To link your Google Authenticator app to CCH iFirm , you need to Login and in your user settings, go to the Multi-Factor Authentication tab.
 - **Email to** – You will receive the authentication code by e-mail to this registered e-mail address.
 - **Text message** – You will receive the authentication code by text message to this registered mobile number. This option will only work if your mobile number was entered as part of your User Profile.
 - **One-Time access code** – Enter the one-time access code generated by your system admin.
 5. Select the option you want to use. For this lesson, select the Email to Option, and click **Proceed**.

The screenshot shows the 'Multi-Factor Authentication' page in the CCH iFirm system. The header includes the CCH iFirm logo and the title 'Multi-Factor Authentication'. Below the header, the instruction reads: 'Select how you want to receive the authentication code:'. There are four radio button options: 'Google Authenticator' (with explanatory text), 'E-mail to sfsXXXXXXXXXX@wXXXXXXXXXXXXXXXXXX' (with explanatory text), 'Text message to +1 XXXXXX9017' (which is selected), and 'One-time access code' (with explanatory text).

6. CCH iFirm displays the Authentication Code fields. Enter the authentication code you received and click **Submit**.

The screenshot shows the 'Enter the authentication code and click the Submit button.' screen. It features an 'Authentication code:' label above a text input field. Below this is a checked checkbox for 'Remember me' with the note 'Do not select the above box if this is a public device' and a browser dropdown menu showing 'Chrome'. At the bottom, there are two buttons: 'Resend' and 'Submit', both highlighted with red boxes.

7. CCH iFirm displays the Subscription Agreement. Read through terms and conditions and acknowledge you have by selecting the checkbox at the bottom of the page. Once done, click **Accept**.

Terms & Conditions

CCH iFirm Application Subscription Agreement
 BY CLICKING "I ACCEPT" AT THE END OF THIS CCH iFIRM APPLICATION STANDARD SUBSCRIPTION AGREEMENT (THIS "AGREEMENT") OR BY INSTALLING, ACCESSING, OR USING ANY PART OF THE HOSTED APPLICATION (AS DEFINED BELOW), YOU ACKNOWLEDGE THAT YOU HAVE CAREFULLY REVIEWED THIS AGREEMENT, THAT YOU UNDERSTAND IT AND ITS TERMS AND CONDITIONS, AND THAT YOU KNOWINGLY AND VOLUNTARILY AGREE TO BE LEGALLY BOUND BY IT AND ITS TERMS AND CONDITIONS. IF YOU DO NOT AGREE WITH THIS AGREEMENT, YOU ARE NOT GRANTED PERMISSION BY CCH SFS TO INSTALL, ACCESS, OR OTHERWISE USE THE HOSTED APPLICATION. IN SUCH CASE, PLEASE CLICK "I REJECT" AND PROMPTLY CEASE USE OF THE HOSTED APPLICATION AND DELETE ANY MATERIALS RELATED TO THE HOSTED APPLICATION THAT YOU HAVE RECEIVED FROM CCH SFS OR THAT YOU HAVE IN YOUR POSSESSION.

CCH iFirm Application Standard Subscription Agreement

This CCH iFirm Application Standard Subscription Agreement (this "Agreement") is made by and between Universal Tax Systems, Inc. d/b/a CCH Small Firm Services ("CCH SFS"), and "Customer" (as defined below), and governs Customer's use of the Hosted Application (as defined below). This Agreement may be viewed at CCH SFS' web site (www.cchfs.com/legal/ or <https://taxna.wolterskluwer.com/legal/>), during Customer's initial access of the Hosted Application, or within the Hosted Application via a link. By accessing the Hosted Application or by otherwise indicating acceptance (electronically or otherwise) of this Agreement, Customer acknowledges agreement to the terms set forth below.

1. **DEFINITIONS.** Capitalized terms used but not defined elsewhere in this Agreement shall have the respective meanings set forth below:

1.1. **"Affiliate"** means with respect to an entity party to this Agreement, any entity which, directly or indirectly, controls, is controlled by or is under common control with such party, where control means the ability to direct the affairs of an entity through ownership of voting interest, contract rights or otherwise.

1.2. **"Authorized User"** means an individual who is authorized by Customer to access or use the Hosted Application. An Authorized User must be a full-time or part-time employee (but may be a contract/temporary employee) working for Customer primarily out of Customer's office(s) (including remote users assigned to such office(s)) for the purpose of assisting Customer in its day-to-day business activities.

1.3. **"Client"** means any third party client of Customer that has entered into a direct agreement with Customer for accounting, payroll or tax services.

1.4. **"Customer"** means the person or entity identified in the "Customer Information" section of the Order Confirmation(s).

1.5. **"Customer Data"** means all data, information, records, or files that are uploaded to, entered in, or stored on the Hosted Application by or on behalf of the Customer. Customer Data does not include any Statistical Data (as defined below).


1.6. **"Fees"** means the amounts payable by Customer to CCH SFS under the Order Confirmation(s) and this Agreement.

I have read and agree to these terms and conditions

8. The first time you log in, CCH iFirm requires that you change your password.

9. Passwords should meet at least three of these requirements:


- Has at least eight characters
- Has at least one numeral (0-9)
- Has at least one capital letter (A – Z)
- Has at least one lower case letter (a - z)
- Has at least one symbol (!@#\$%^&*-_+=|;:/>~)

 You will be prompted to change your password every 90 days.

10. Change the temporary password to a password of your choice and click **Change Password**.

Change Password
✕

New Password

 [Tell Me More](#)

Re-enter New Password

✓ **Change Password**

Cancel

11. CCH iFirm displays the Dashboard.

The screenshot displays the CCH iFirm dashboard for a user named Maria Rangel. The dashboard is organized into several sections:

- Missing and Incomplete Timesheets:** A table showing timesheet data for various days in May 2022. All days show 8.00 standard hours, 0.00 recorded hours, and 8.00 missing hours.
- Top 10 Current Resource Allocation Variances:** A table showing resource allocation for Maria Rangel. She has 2.00 hours allocated and 3.25 hours worked, resulting in a variance of 1.25 (62.50%) and 3.00 hours allocated with 3.00 hours worked (0.00 variance, 0.06%).
- Top 10 Overdue Jobs:** A list of jobs with their target end dates and status. Most are 'Allocated', but several are 'Not yet in'.
- My Ordered Jobs:** A single job entry for ACC Jan 31 2022, client Ali, Deed, with a status of 'Allocated'.
- Recently Bounced Emails:** A list of bounced emails with dates, names, and categories.

The dashboard also includes a navigation menu on the left with options like Home, Jobs, Contacts, Time and Billing, Client Portal, Reports, Team Directory, and Settings. A 'Quick Links' section on the right provides access to support resources.

Day	Date	Standard	Recorded	Missing
Thursday	May 05 2022	8.00	0.00	8.00
Wednesday	May 04 2022	8.00	0.00	8.00
Tuesday	May 03 2022	8.00	0.00	8.00
Monday	May 02 2022	8.00	0.00	8.00
Friday	Apr 29 2022	8.00	0.00	8.00
Thursday	Apr 28 2022	8.00	0.00	8.00
Wednesday	Apr 27 2022	8.00	0.00	8.00
Tuesday	Apr 26 2022	8.00	0.00	8.00
Monday	Apr 25 2022	8.00	2.75	5.25
Friday	Apr 22 2022	8.00	0.00	8.00

Name	Hours Allocated	Hours Worked	Variance	Percentage
Maria Rangel	2.00	3.25	1.25	62.50
Maria Rangel	3.00	3.00	0.00	0.06

Job	Client	Target End Date	Job Status
ACC Jan 31 2022	Ali, Deed	Feb 19 2022(-75)	Allocated
ACC Jan 31 2022	Banks, Billy	Feb 19 2022(-75)	Allocated
ACC Jan 31 2022	Ambrose, Samuel	Feb 19 2022(-75)	Allocated
ACC Jan 31 2022	Barnes, Nick	Feb 19 2022(-75)	Allocated
ACC Jan 31 2022	AVELAR, GONZALO	Feb 19 2022(-75)	Allocated
BKK Feb 28 2022	Barnes, Nicholas	Mar 15 2022(-91)	Not yet in
T1040 Dec 31 2021	Jameson, Odin	Mar 15 2022(-91)	Allocated
T1040 Dec 31 2021	Caldwell, Megan	Mar 15 2022(-91)	Not yet in
T1040 Dec 31 2021	Hammet, Thor	Mar 15 2022(-91)	Not yet in
T1040 Dec 31 2021	Smith, Christian	Mar 15 2022(-91)	Not yet in

Job	Client	Job Status
ACC Jan 31 2022	Ali, Deed	Allocated

Date Sent	Name	Category
Apr 21 2022	Brown, Glen	Statements
Apr 21 2022	Andrews, Diane	Statements
Apr 21 2022	Ashton Engineering	Statements
Apr 20 2022		Internal
Apr 20 2022		Internal
Feb 25 2022	Andrews, Diane	Statements
Feb 25 2022	Ashton Engineering	Statements

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