

# CCH Access Portal/Client Access 2-Step Verification FAQs

Tax-refund fraud in 2016 reached about \$21 billion, up from just \$6.5 billion in 2014, according to the IRS. With recent rises in tax-related identity theft and phishing attacks, thieves can take over the credentials of firm staff or their clients to gain access to confidential financial data including tax returns, financial statements and more. Simple passwords – or even complex passwords requiring various combinations of letters, numbers and special characters – may not be enough to protect sensitive firm and client data. That's why we've decided to require a more secure login process for CCH Access Portal and CCH Client Access.

**Beginning April 29, 2018, 2-step verification will be mandatory for all users logging into CCH Access Portal/CCH Client Access.**

- **What is 2-step verification?** 2-step verification adds an extra layer of protection for your Portal account. Simple passwords – or even complex passwords requiring various combinations of letters, numbers and special characters – may not be enough to protect sensitive firm and client data. The password is a single factor in the authentication process that verifies a users' identity. 2-Step Verification (also known as multifactor authentication) requires a second factor in addition to the password as part of the authentication process. This requirement adds another layer of protection against hacking and fraud attempts. If a bad guy hacks through your password layer, he'll still need your phone or access to your email account to get into your CCH Access Portal account.
- **Isn't 2-Step Verification optional for CCH Access Portal?** We added the multi-factor authentication option to CCH Access Portal and CCH Client Access last year. It was not mandatory at that time. However, we will begin *requiring* this increased security measure for *all users* logging into the Portal websites beginning on April 29, 2018.
- **Why are you making this change?** Tax-refund fraud in 2016 reached about \$21 billion, up from just \$6.5 billion in 2014, according to the IRS. With recent rises in tax-related identity theft and phishing attacks, thieves can take over the credentials of firm staff or their clients to gain access to confidential financial data including tax returns, financial statements and more. Simple passwords – or even complex passwords requiring various combinations of letters, numbers and special characters – may not be enough to protect sensitive firm and client data.
- **When do I need a verification code to login to CCH Access?** You will need to verify your identity:
  - Every time, if you don't check '*Remember this device.*'
  - When logging in from a new device or from a new web browser on a registered/trusted device, or after clearing cookies in your web browser.
  - When going through the *Forgot Password* process to reset your password.
  - When logging in more than 90 days after your last verification
  - For more information, see [our introductory video on 2-Step Verification.](#)
- **Does 2-Step Verification apply for ProSystem fx Document On-Premise firms with Integrated Portal?** 2-Step Verification will be enabled for client users of Integrated Portal (both CCH Access and ProSystem fx Doc On-Premise). Since firm users do not log into the website, they will not be affected by this change, but their clients will go through the 2-Step Verification process.
- **How should I let my clients know about this change?** We've created a client-facing email template you can send to your clients to announce this change, and a one-page PDF explaining how to log in using the new process. You can also use CCH Access Portal's [Announcements feature](#) to announce this change to your clients. Our suggested text for the announcement is below.

**Title: Multi-Factor Authentication Begins April 29, 2018**

Body: On April 29, 2018, we will enable multi-factor authentication on all portal accounts. An added layer of protection for your sensitive financial and tax return data, multi-factor authentication will make it much harder for someone to get into your account, even if they had your password. After this date, you will be required to complete one additional step to verify your identity before you can log into your portal from new devices or browsers.