






Portal User Guide

| Icon Legend | | |
|---|---------|-------------------------------------|
|  | Tips | Best practice tips and shortcuts |
|  | Notes | Informational notes about functions |
|  | Warning | Important warnings about a function |

Your Portal

<https://www.clientaccess.com>

Your Portal lets you receive and share files with us from any web browser or operating system.

You can also watch a short introduction to the portal by clicking on this link:

<https://www.youtube.com/watch?v=BKB3UQcx1CM>



You can access your portal via the web URL above, or by downloading the free mobile app. Search “CCH Client Access” in the Apple® App Store or the Google® Play Store.

Logging in to your Portal

Login using the URL above or via the mobile app. Refer to your welcome email for the temporary password needed for your initial login.

Wolters Kluwer
CCH

Welcome to your portal!

Login ID
youremail@email.com

Password
••••••••

Save Login

Log In

[I Forgot My Password](#)

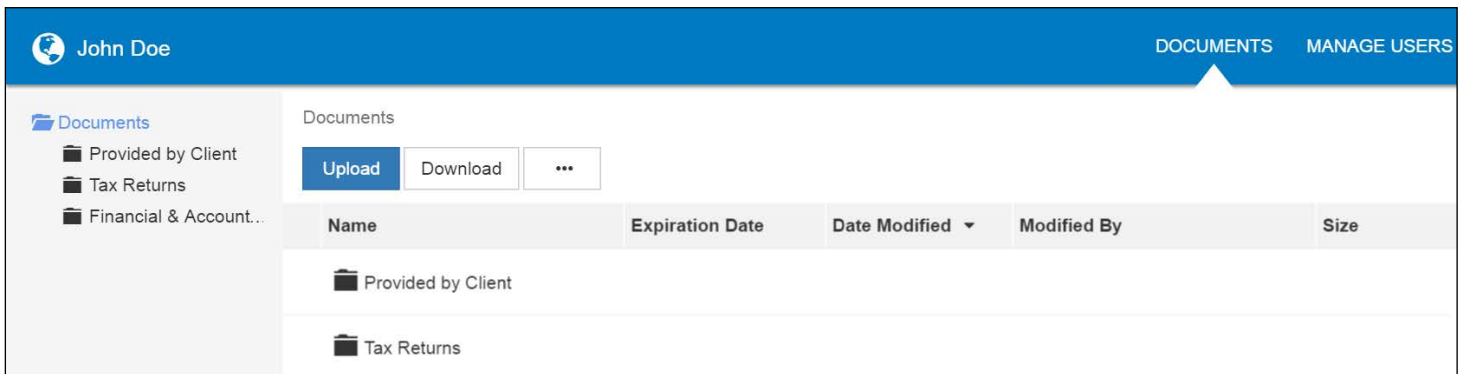
Login



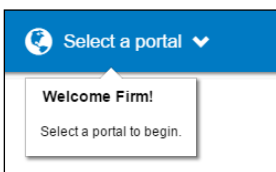
Login Tips

- The Login ID (email address) is not case sensitive; the temporary password is.
- You will be required to change your password upon logging in for the first time and answer security questions. Your security questions can help you access your portal if you ever forget your password.
- Your new password may be from 8 to 32 characters in length, must contain at least one alpha character, one numeric character, and one special character (e.g. !, @, #, etc.). The password is case sensitive.
- Your password may be reset at any time by clicking “**I Forgot My Password?**”.

Downloading files from your Portal



Portal Home Page



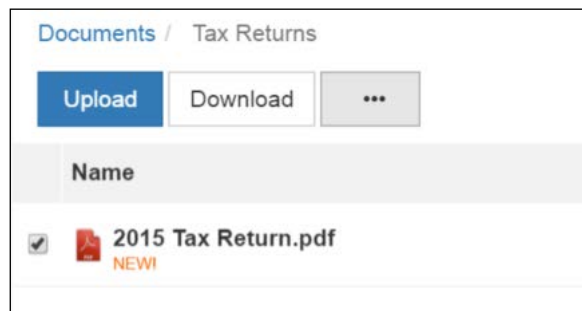
Select a portal



If you have access to more than one Portal, click **Select a Portal** at the top, left-hand portion of the page, and then select or search for a portal by name.



After logging in to your Portal, you will see a list of folders used to organize your files. **Click on a folder to display its files.**



Download Files

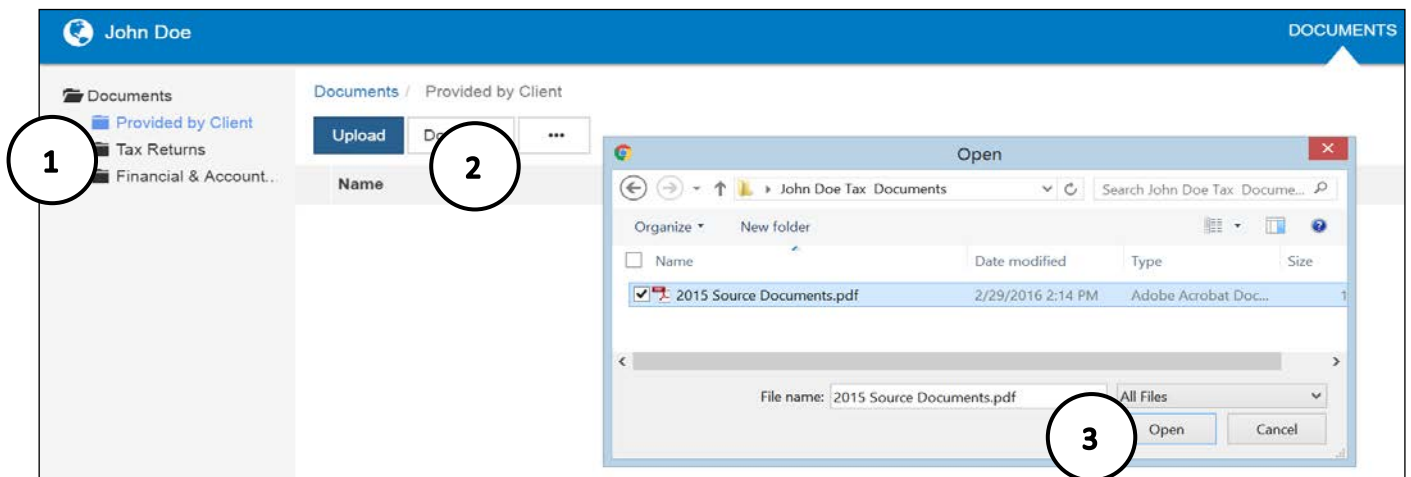


To download a file, simply click the file name or check the box and click **Download**, either option will launch your browser's file download prompt allowing you to open or save the file. You can download one or multiple files at a time.



To download files, it may be necessary to disable your pop up blocker in Google® Chrome®, or other web-browsers.

Uploading files to your Portal

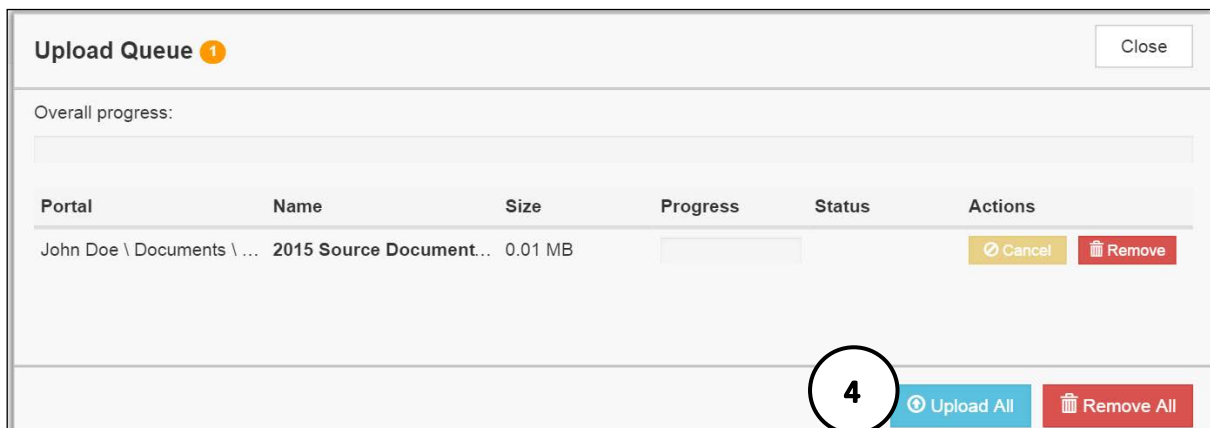


Upload Files



Follow the steps to add a file to your Portal:

1. Click the destination folder (where the file will be located)
2. Click **Upload**, browse to and select the file(s) you wish to upload
3. Click **Open**



Upload Queue

4. The **Upload Queue** will launch automatically. Click **Upload All** to upload the displayed file(s). An email notification is sent to your tax preparer.




You will see an on-screen confirmation that your file(s) were successfully added to your Portal. Return to your Documents or simply close your browser window to exit.



You can also drag-and-drop files into the destination folder to activate the Upload Queue. Once the Queue is displayed, click Upload All and your files will be added to your Portal.



Click the  icon at the top, right-hand corner of the page to reactivate the Upload Queue if you accidentally minimize it prior to selecting Upload All.

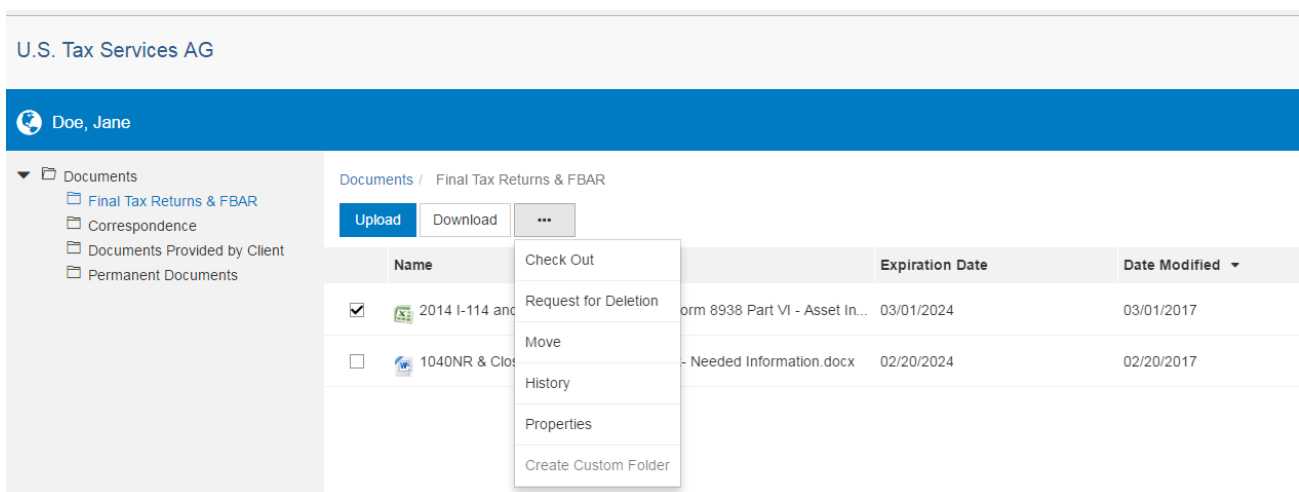
Please do not use accented characters such as ä, ö, ü, è, é, in the file names of any documents you upload since the Portal may reject them.

If you are unable to upload a file that gets stuck in the Upload Queue after clicking **Upload All** and you see that the progress bar does not progress, please try the following:

- Remove the file from the queue. Try to upload it again.
- Remove the file from the queue. Rename the file. Try to upload it again.
- Remove the file from the queue. Try to upload a completely different file to determine if the problem is limited to the previous file.
- Clear the browser’s cache and cookies.
- Try a different web browser (Explorer, Firefox, Chrome, Safari).

Working with Files

Deleting Files



The screenshot shows a web interface for "U.S. Tax Services AG" with a user profile for "Doe, Jane". The left sidebar shows a "Documents" folder containing "Final Tax Returns & FBAR", "Correspondence", "Documents Provided by Client", and "Permanent Documents". The main area shows a breadcrumb "Documents / Final Tax Returns & FBAR" and a table of documents. A context menu is open over the first row, showing options: "Check Out", "Request for Deletion", "Move", "History", "Properties", and "Create Custom Folder".

| | Name | Expiration Date | Date Modified |
|-------------------------------------|----------------|-----------------|---------------|
| <input checked="" type="checkbox"/> | 2014 I-114 and | 03/01/2024 | 03/01/2017 |
| <input type="checkbox"/> | 1040NR & Clos | 02/20/2024 | 02/20/2017 |

Delete Files



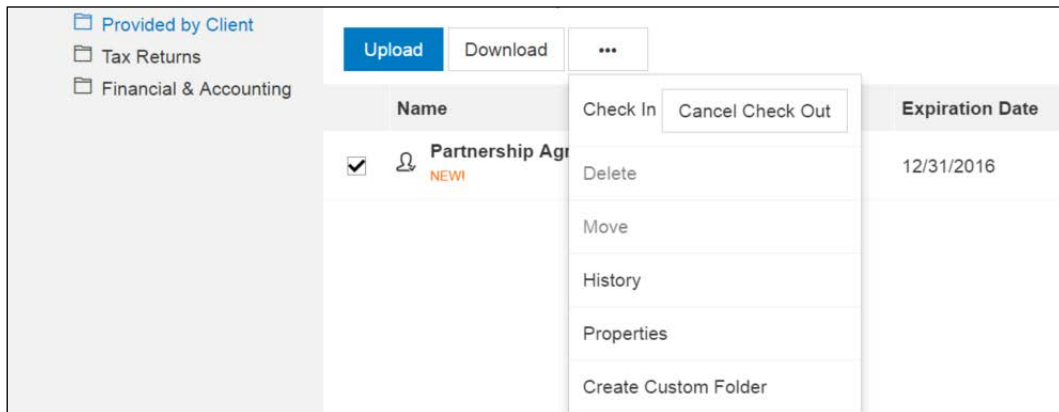
You can **not** delete files that are uploaded.



If you would like to remove a file on your Portal, click the box to the left of the file name, click the “... **More Options**” button, and then choose the option “**Request for Deletion**”. This will notify us that you want us to delete the file.

Checking Out Files

Work with us by using the Check Out feature to download a file, make changes, and then add the modified file back to the Portal. The file will be overwritten to reflect your changes upon Check In.



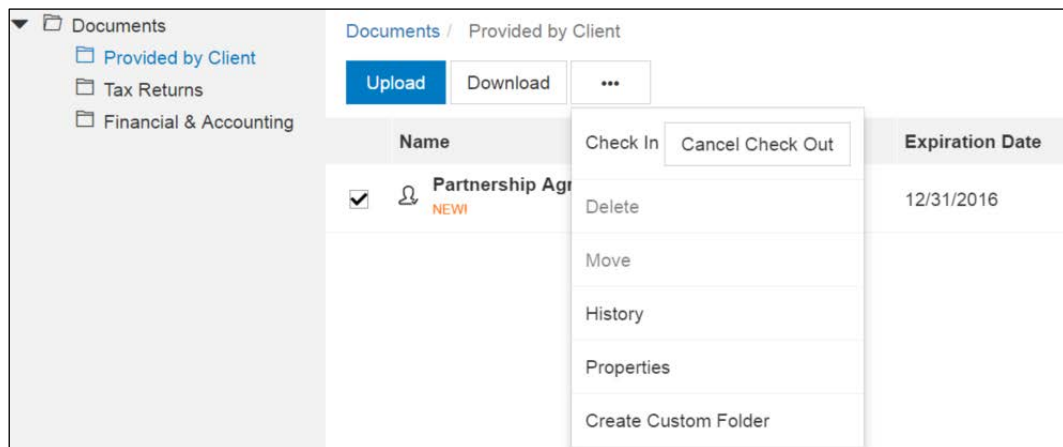
Check out a file



Steps to Check Out a file

1. Check the box to the left of the file name, and then click the **More Options** button
2. Select **Check Out**
3. On the **Check-out** prompt, click the **Due date to check in** field, and choose the latest date you expect to Check In the file, then click **Check Out**
4. When prompted by your web browser, save the file to your computer
5. Launch the file and make any desired changes, then click **Save** and close

Checking in Files



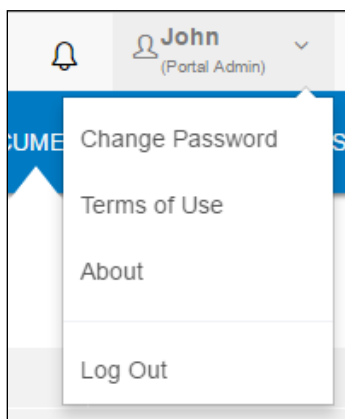
Check in a file



Steps to Check In a file

1. Log in to the Portal, browse to the folder where the checked out file is located
2. Check the box to the left of the file name
3. Click the **More Options** button, and select **Check In**
4. When prompted, click Browse and navigate to the checked out file on your computer.
5. Click **Check In**
6. You will receive confirmation the file has been checked in successfully

Changing Passwords and Logging Out



User Options



At the top right-hand portion of the page, click the arrow to view your user options. From this menu you can change your password or Log out of the Portal.