




CCH Client Axxcess™ Portal User Guide

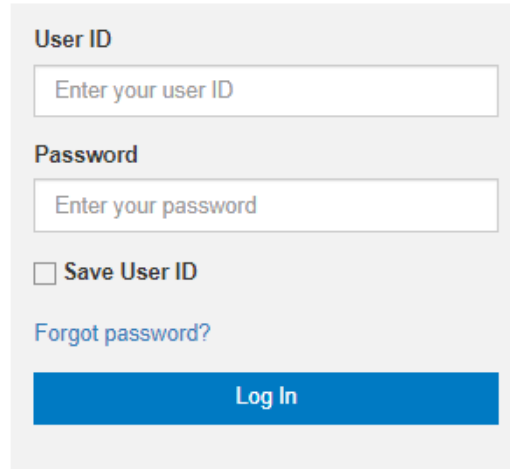
For Use With Google Chrome and Safari Web Browsers

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

Quick Start Guide

Portal Login

Launch your internet browser and browse to <https://www.clientaccess.com/#/login>

A screenshot of a web login form. It features two input fields: 'User ID' with the placeholder text 'Enter your user ID' and 'Password' with the placeholder text 'Enter your password'. Below the password field is a checkbox labeled 'Save User ID'. A blue link 'Forgot password?' is positioned below the checkbox. At the bottom of the form is a prominent blue button labeled 'Log In'.

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 “**Forgot password?**”.
- If prompted, review and agree to the Schofer Dillberg & Company end user license agreement. You can also download a copy.

Downloading files from Client Access

Name	Expiration Date	Date Modified	Modified By	Size
Provided by Client				
Tax Returns				
Financial & Accounting				

Client Access 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.



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

Name
<input checked="" type="checkbox"/> 2015 Tax Return.pdf NEW!

Download Files

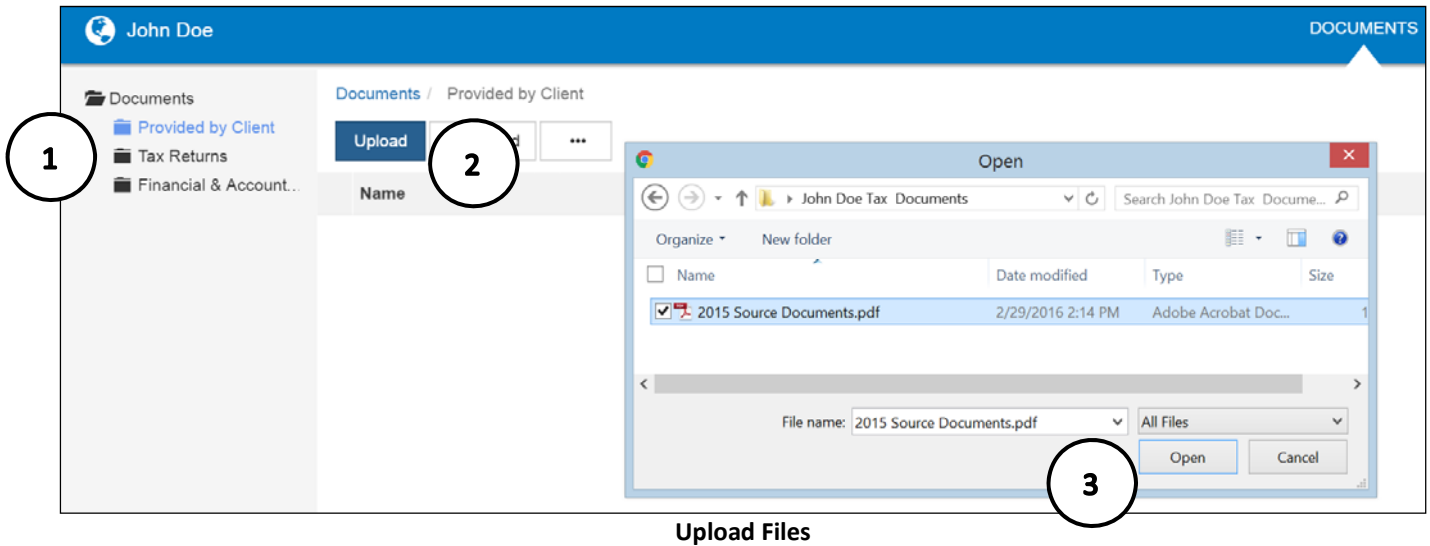


To download a file, simply click the file name or check the box and click **Download**, either option will launch your browser's file download prompt allowing you to open or save the file.



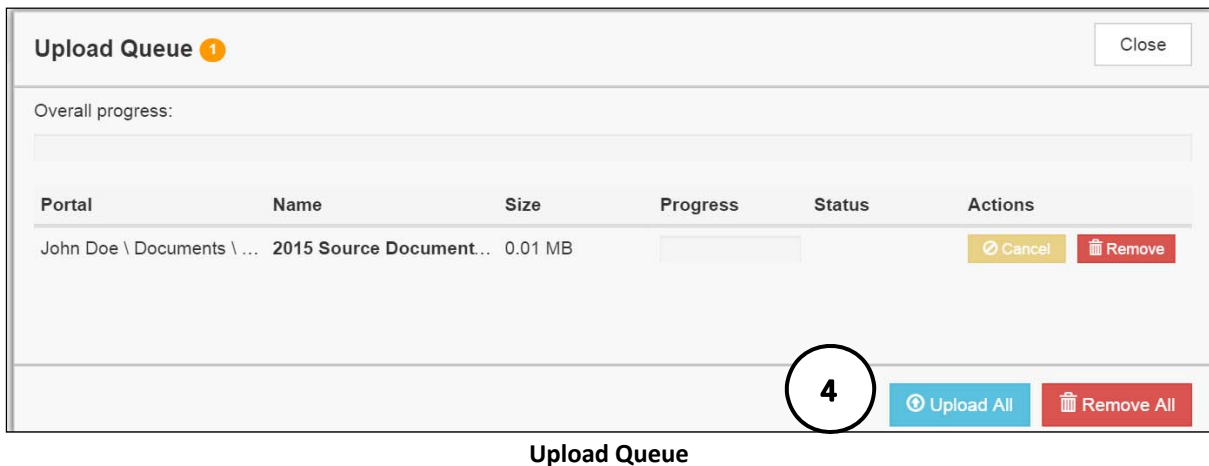
To download files, it may be necessary to disable your pop up blocker in Google® Chrome®, or other web-browsers.

Uploading files to Client Access



Follow the steps to add a file to you Client Access 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**



4. The **Upload Queue** will launch automatically. Click **Upload All** to upload the displayed file(s) to Client Access.




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



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 Client Access.



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.