




# CCH Client Axxcess™ User Guide

**RoseMcKenna, PLLC**

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

## CCH® Client Axcess

<https://www.clientaccess.com>

CCH® Client Axcess allows you to receive and share files with [RoseMcKenna] from any web browser or operating system.



It is important to note that based on [RoseMcKenna]’s portal configurations, you may not have access to every feature covered in this guide.



CCH® Client Axcess can be accessed via the web URL (see above), or by downloading the free mobile app. Search “CCH Client Axcess” in the Apple® App Store or the Google® Play Store.

## Logging in to Client Axcess

For added security, [RoseMcKenna] is utilizing multi-factor authentication (“MFA”) to confirm your identity. MFA allows users to confirm their identity by entering a code that is sent to them via email, text message, or voice message.

To log in for the first time, click the authentication link in your Portal welcome email. You will be asked how you would like to receive your authentication code. You may select to receive your authentication code via email, text message (if available) or voice prompt via telephone (if available).

**Verify Your Identity**

For added security, we need to verify your identity. You will receive a one time code to be used to verify your identity.

How do you want to get the code?

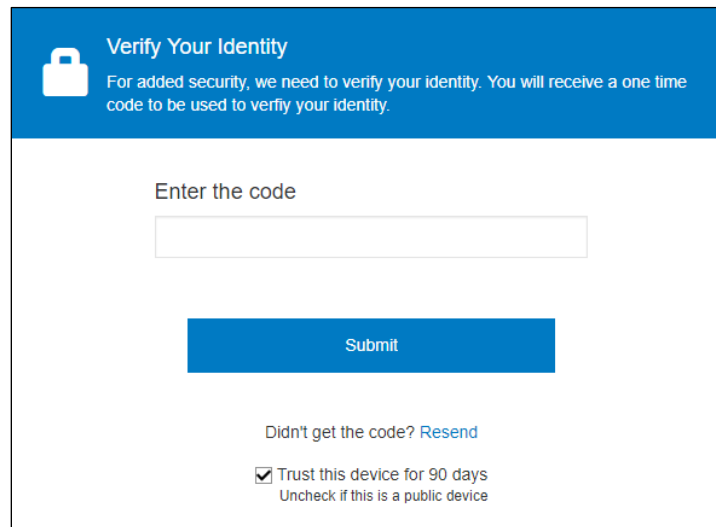
- Email to**  
Ne\*\*\*\*\*@ge\*\*\*\*\*
- Text message to**  
*Message and data rates may apply*
- Voice message to**

**Send the Code**

*This code will expire in 5 minutes*

**Figure 1**

On the next screen, enter the code. Check the box at the bottom if you would like Portal to trust your computer or other device for up to 90 days. Using a trusted device means you will not have to repeat the Multi-Factor Authorization procedure. In 90 days, you will have to request another authentication code.



**Verify Your Identity**

For added security, we need to verify your identity. You will receive a one time code to be used to verify your identity.

Enter the code

Submit

Didn't get the code? [Resend](#)

Trust this device for 90 days  
Uncheck if this is a public device

**Figure 2**

Once you have submitted the code, you will be prompted to set up your password.



### Login Tips

- The Login ID (email address) is not case sensitive.
- The password must contain at least one upper-case letter, one number, and one special character. The password is case sensitive and must be between 8 and 32 characters.
- Your password may be reset at any time by clicking “**I Forgot My Password?**”.
- If prompted, review and agree to the [RoseMcKenna] end user license agreement. You can also download a copy.

### Guided Tours

Tours provide information about the features that are relevant for the logged-in user. There are two tours:

- New User Tour - This tour automatically displays the first time a user logs in to Client Axxess. It guides users through the most commonly used features based on their user type such as information about their portal, how to use file- and folder-related activities, and how to add users to their portal.
- What's New Tour - This tour displays the first time a user logs in to Client Axxess after a major release. The tour displays releasespecific information, including how to use the features added in the release.



You can re-launch either tour from the user profile menu, located in the top right corner of the screen, at any time.

## Downloading files from Client Axxess

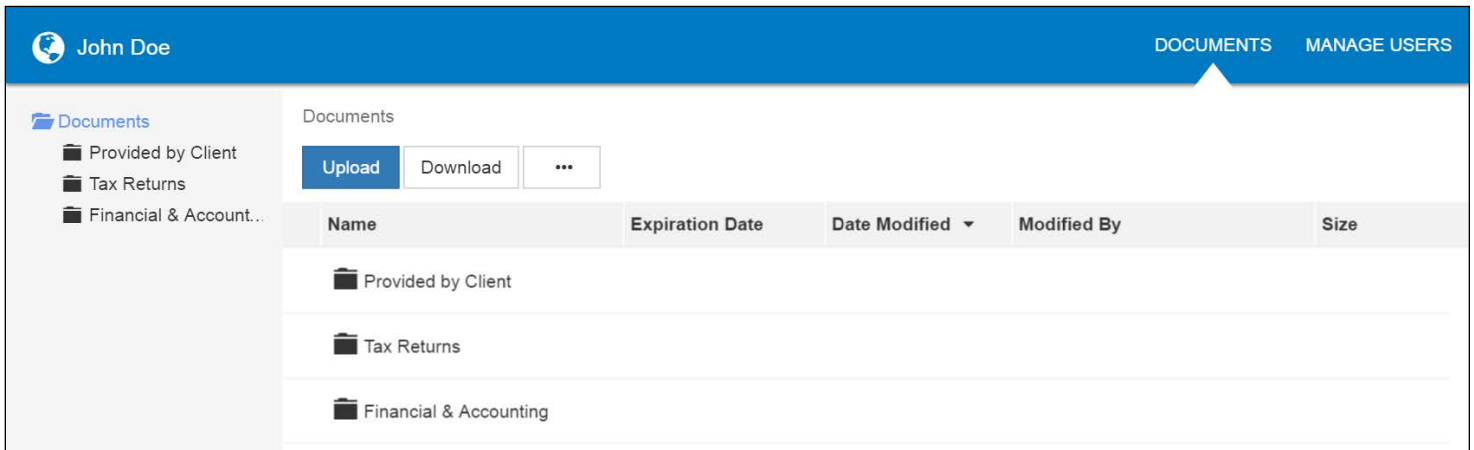


Figure 3

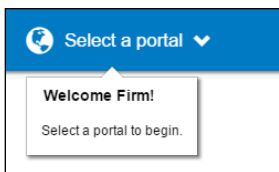


Figure 4



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

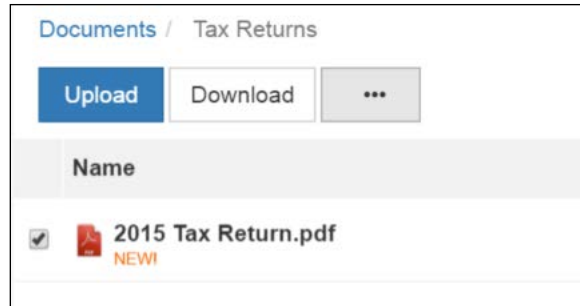


Figure 5

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 Client Access

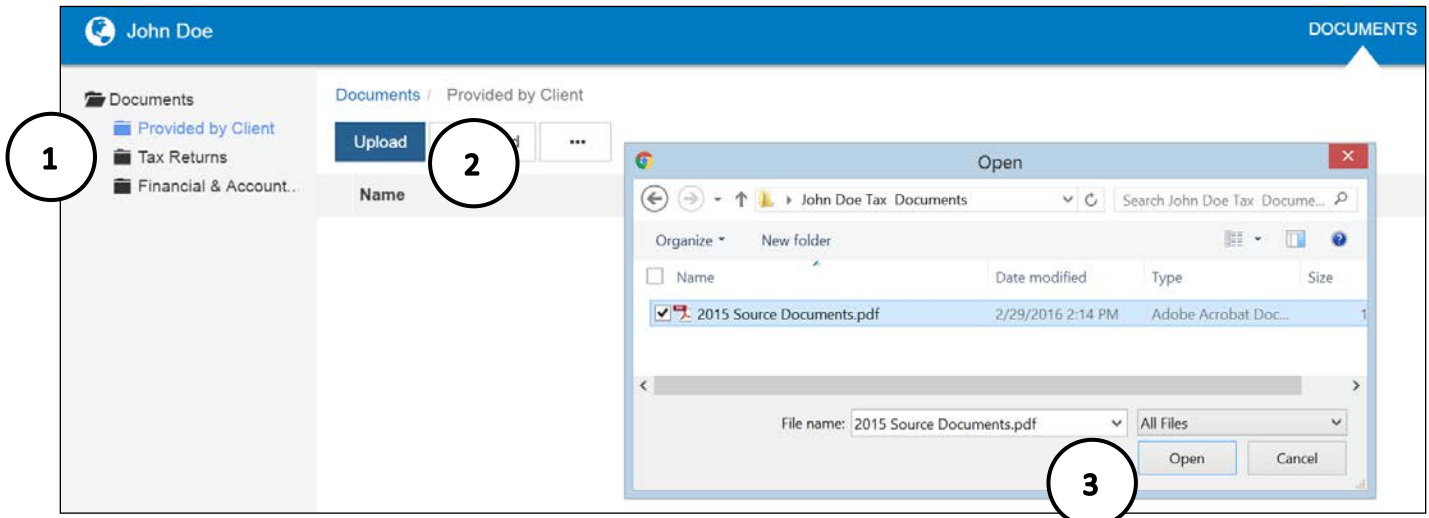


Figure 6

### 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**

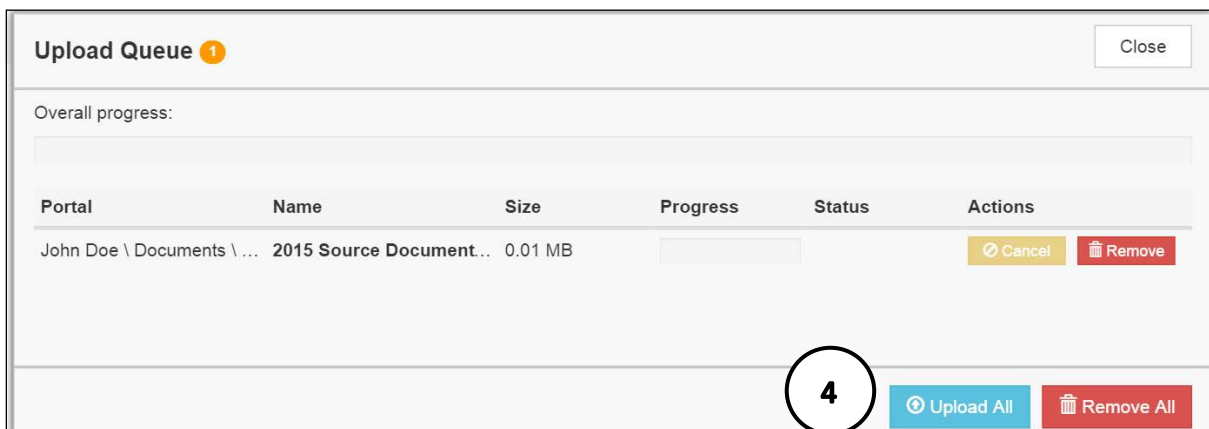


Figure 7


4. The **Upload Queue** will launch automatically. Click **Upload All** to upload the displayed file(s) to Client Access. An email notification is sent to [RoseMcKenna].

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.

# Working with Files in Client Access

## Deleting Files

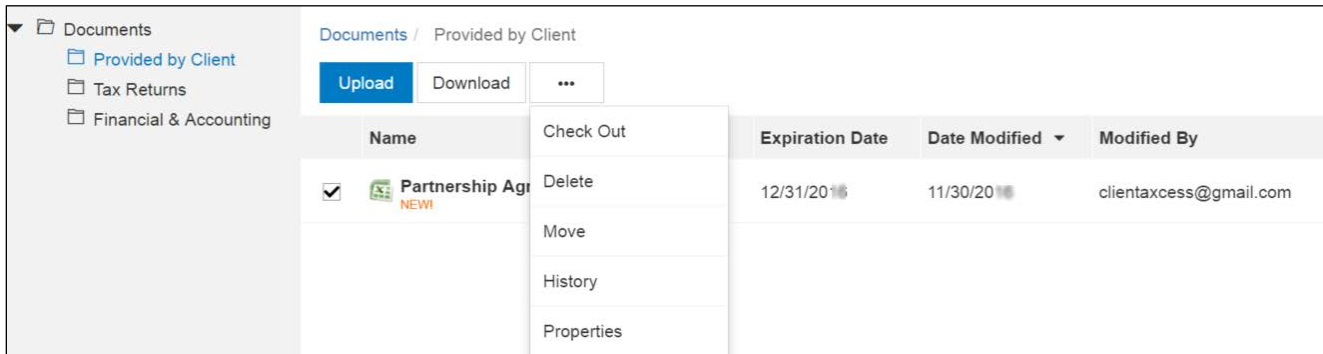


Figure 8



You can **not** delete files uploaded by [RoseMcKenna] or other Portal users. You can delete files that you upload. Click the box to the left of the file name, click the **More Options** button, and then choose **Delete**. You will be prompted for confirmation, click **Yes** to remove the file from Client Access.



If you would like to have a file added by [RoseMcKenna] or another portal user removed from Client Access, follow the steps above, but choose the option “**Request for Deletion**”, which will be displayed instead of the Delete, and will email to [RoseMcKenna] notifying us that you want the file to be deleted.

## Checking Out Files

Collaborate with [RoseMcKenna] by using the Check Out feature to download a file, make changes, and then add the modified file back to Client Access. The file will be overwritten to reflect your changes upon Check In.

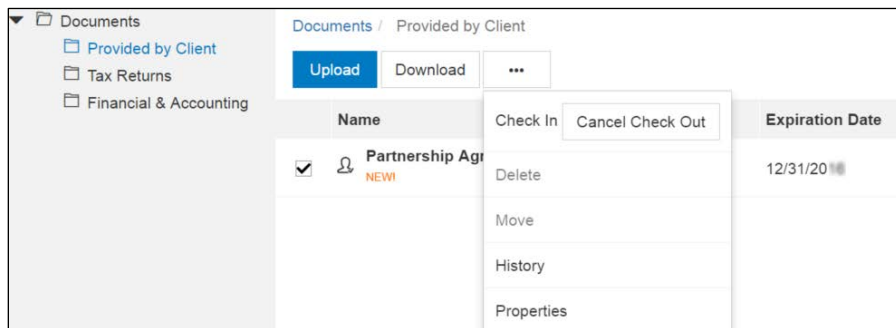


Figure 9

### 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 or network
5. Launch the file and make any desired changes, then click **Save** and close

## Checking in Files

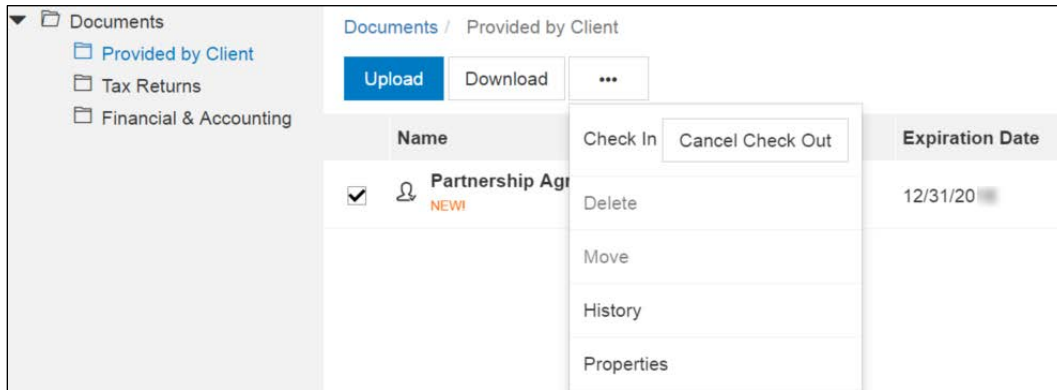


Figure 10

### Steps to Check In a file

1. Log in to Client Access, 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

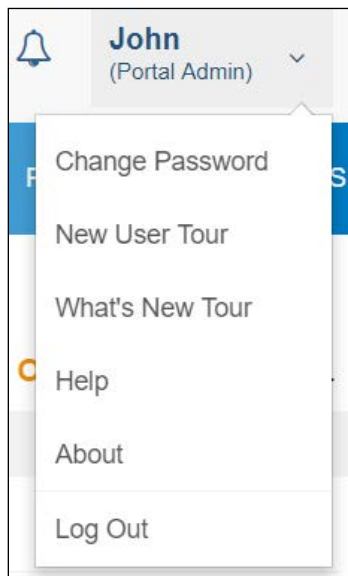


Figure 11



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 view the Guided Tours, or Log out of Client Access.

## Advanced Features

This section is intended to provide further assistance on the more complex features available to a Portal Admin user. The advanced features are optional, and are not required for each Client Access portal.

### *Portal User Roles*

#### **Portal Admin**

The Portal Admin is the primary user for each Client Access portal. The Portal Admin may perform all portal-related functions, create other Portal Users and control access for other Portal Users. The Portal Admin user will be the only user that exists initially when a portal is created.

#### **Portal User**

A Portal User is created and granted access by the Portal Admin or the firm. Portal Users should only be created when Portal access is required by more than one person.

### *Example of Advanced Portal Use*

- You may find situations in which it is practical to grant portal access to a third party. For example, a banker that you and the firm collaborate with on a regular basis. Before having access to Portal; options to exchange information included email, fax, CD-ROM, or hard copy paper, and in many cases you had to request the document from the firm before you could provide it to the bank. As the Portal Admin, you may create a Portal User allowing your banker access to requested documents and the ability to add files at the request of you and the firm; considerably reducing the time and resources spent to exchange information. The security level of Portal far exceeds email, which is most often the primary medium of exchanging electronic files.
- If the firm has created more than one portal for you, you will be able to control which portal(s) your banker or other third party may view.
- Your firm's portal solution, may or may not, provide you with the ability to secure folders. If available, this feature allows the Portal Admin to control a Portal User's access to one or more folders within a portal.

### *Managing Portals*

The Portal Admin may grant portal access to others by creating Portal Users.

#### **There are three steps to create Portal Users:**

1. Create the Portal User
2. Grant the Portal User access to one or more portals
3. Choose the Portal User's File Management Role for each portal they are granted access



## About File Management Roles

There are five File Management Roles that can be assigned:

1. **Administrator** – Allows Portal Users to perform all file operations.
2. **Standard User** – Allows Portal Users to perform the most common file operations.
3. **Limited User** – Allows Portal Users to perform a limited number of file operations.
4. **Read-only User** – Allows Portal Users to download files and review related information.
5. **Upload-only User** – Allows Portal Users to upload files and review related information.



It is our recommendation that Administration rights NOT be granted to Portal Users.

## Create Client Access Portal Users

The screenshot shows the 'Manage Users' interface. At the top, there is a user profile for 'John Doe' and navigation tabs for 'DOCUMENTS' and 'MANAGE USERS'. Below the navigation, there is an 'Add User' button and a search bar with the text 'Search for a user' and a 'Search' button. The main area contains a table with the following columns: 'Last Name', 'First Name', 'Email', 'Grant Acces...', and 'Access Expiration'. The table lists two users: 'Banker' (Jim) and 'Doe' (John). Both users have their 'Grant Acces...' checkbox checked and an 'Access Expiration' date of 11/30/20.

<input type="checkbox"/>	Last Name ▲	First Name	Email	Grant Acces...	Access Expiration
<input type="checkbox"/>	Banker	Jim	██████████@gmail.com	<input checked="" type="checkbox"/>	11/30/20
<input type="checkbox"/>	Doe	John	██████████@gmail.com	<input checked="" type="checkbox"/>	

Figure 12

From the Client Access home page, click **Manage Users**, then click **Add User**.

The screenshot shows the 'Add a user to John Doe's portal' form. At the top, there is a user profile for 'Jim (Portal User)' and buttons for 'Cancel' and 'Save and Close'. The form has two tabs: 'User Profile' and 'Assigned Portals'. The 'User Profile' tab is active and contains the following fields: '\*Login ID (email address)' with the value 'newuser@email.com', '\*Last name' with the value 'User', '\*Default security user role' with a dropdown menu set to 'Limited User', and '\*First name' with the value 'Portal'.

Figure 13

On the **User Profile** tab, enter the Login ID (email address), last and first name of the user and phone number; these are the only items that are required. The next step is to click the **Assigned Portals** tab.

## Create Client Access Portal Users Continued:

The screenshot shows a web interface for adding a user to a portal. At the top, it says "Add a user to John Doe's portal" with "Cancel" and "Save and Close" buttons. Below this, there are two tabs: "User Profile" and "Assigned Portals". Under "Assigned Portals", there is a table with the following data:

Portal Name	File Management Role	Grant Acces...	Access Expiration
John Doe	Limited User	<input checked="" type="checkbox"/>	12/31/20

Figure 14

## Assign a Portal User to a Client Access Portal

1. Initially, only the portal you are logged in to displays, check the **Grant Access** box to allow access to this Portal. Click **Assign more portals** to grant the new user access to other portals the firm has created for you, if applicable.
2. If necessary, modify the assigned **File Management Role** for the selected Portal.
3. To prevent long-term access, select an **expiration date** for the user's access to this portal (optional).
4. Select **Save and Close** to create the Portal User. Emails containing login information will be sent to the login ID (email address) of the Portal User.

## Editing or Deleting Client Access Portal Users

The screenshot shows the "Manage Users" interface. At the top, it says "John Doe" and "MANAGE USERS". Below this, there are buttons for "Add User", "Edit", and "...". There is a search bar with "Search for a user" and "Search" buttons. Below the search bar, there is a table with the following data:

	Last Name	First Name	Email	Grant Acces...	Access Expiration
<input checked="" type="checkbox"/>	Banker	Jim	...@gmail.com	<input checked="" type="checkbox"/>	11/30/20

Figure 15

Access to a Portal may be modified or terminated at any time. In the **Manage Users** window, click the box to left of the user's name, and then click the **More Options** button to delete the user, or click the **Edit** button to modify.



It is important to terminate access when no longer needed by the Portal User. If you need assistance please contact [RoseMcKenna].

## Working with Folders

### Securing Folders

If needed, the Portal Admin can limit which files are visible to Portal Users at the folder level by using the **Secure Folder** feature. When folder security has been applied, the folder is only visible to those with access to the folder.

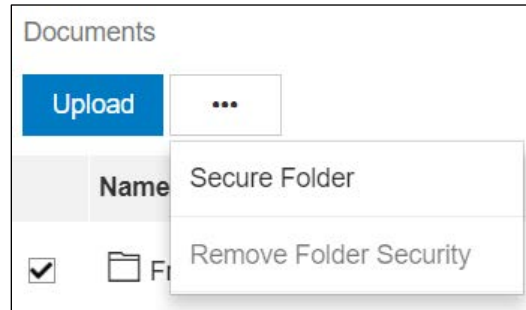


Figure 16

To secure a folder, check the box located to the left of the folder, and select the **More Options** button. When presented with the menu, choose **Secure Folder**.

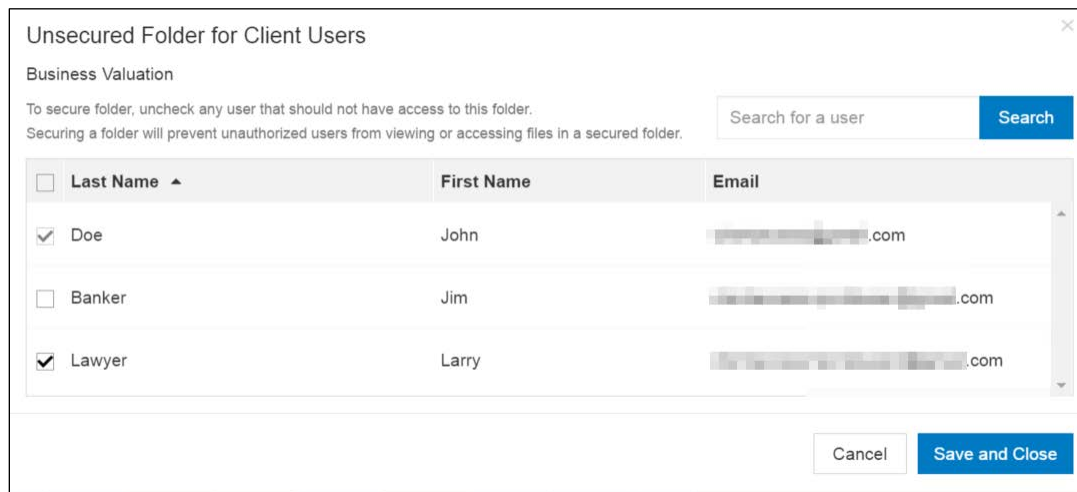


Figure 17

You will be prompted to specify which Portal Users **should NOT** be able to access files within the folder. **Uncheck the box for each user that should NOT have access to the folder**, and then click **Save and Close**.



To edit or remove folder security, check the box, click the **More Options** button, and select **Secure Folder** or select **Remove Folder Security**.



Figure 18

When security is applied to a folder, the icon changes from a folder to a lock.