Chandler's New Client Portal is Coming!

Over the next 60 days, Chandler will begin launching an upgraded version of its client service portal for reporting and accounting. The new platform, powered by Clearwater Analytics, will provide a more user-friendly interface, improved automation, and advanced customization for reports.

During the last week of November, we will be sending out a training video which will demonstrate how to use the new portal, to be accompanied by a user manual for reference. You should also receive two emails between November 28 and December 31 which will provide details on how to access the portal.

Email #1 (From your Client Services representative at Chandler)

Purpose: To provide your login credentials, as well as FAQs, a how-to manual, and access to the webinar recording. Note that you will continue to access the portal from Chandler's website homepage.

Email #2 (from OKTA)

Purpose: To set up multi-factor authentication (MFA), an important security tool that keeps your data safe. You will need the credentials provided in email #1 to activate your OKTA account to access the portal.

We look forward to introducing you to the new system and answering your questions. If you have specific questions in advance of the training, please contact your Client Service Representative.

Thank you,
Chandler's Client Service Team