

# CCH Client Axcess™ User Guide

## S.R. Snodgrass, P.C.



### Icon Legend



**Tips** Best practice tips and shortcuts



**Notes** Informational notes about functions



**Warning** Important warnings about a function

## CCH® Client Axcess

<https://www.clientaxcess.com>

CCH® Client Axcess allows you to receive and share files with S.R. Snodgrass, P.C. from any web browser or operating system.

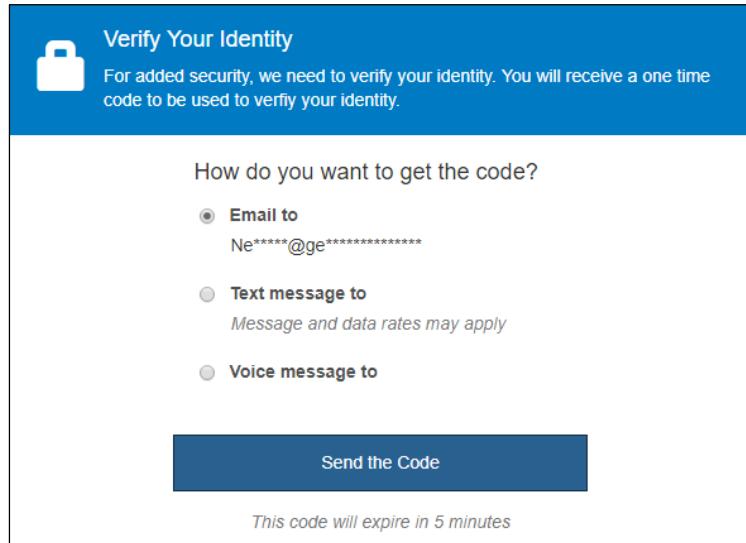


CCH® Client Axcess can be accessed via the web URL (see above), or by downloading the free mobile app. Search “CCH Client Axcess” in the Apple® App Store or the Google® Play Store.

## Logging in to Client Axcess

For added security, S.R. Snodgrass, P.C. 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, go to the portal website: <https://www.clientaxcess.com>. Enter your *existing portal credentials* (i.e., your User ID/email address and existing password). If you don’t remember your portal password, click the “Forgot Password?” link on the login page to request a new password. Next, choose how you’d like to receive your 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.

How do you want to get the code?

Email to  
Ne\*\*\*\*\*@ge\*\*\*\*\*

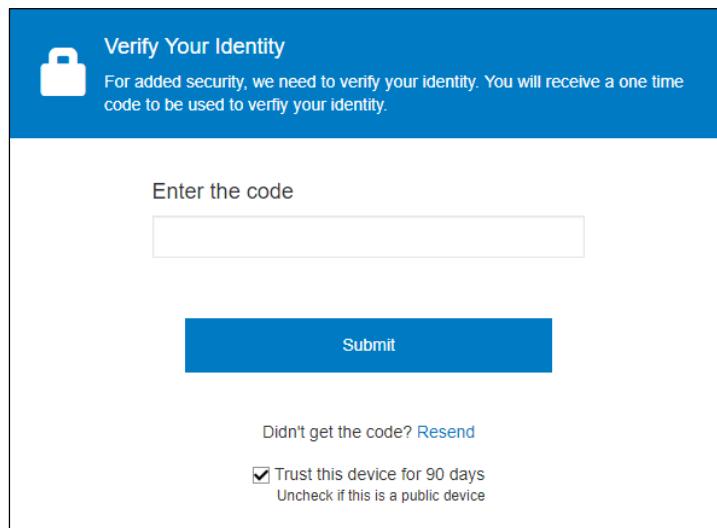
Text message to  
Message and data rates may apply

Voice message to

Send the Code

*This code will expire in 5 minutes*

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



## 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 “**Forgot Password?**”.

## Guided Tours

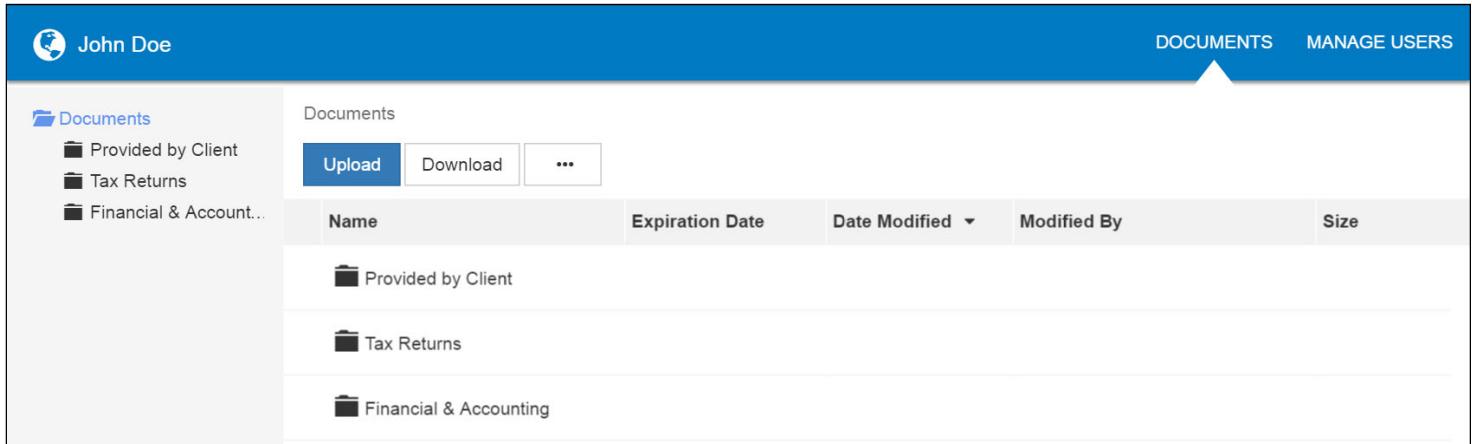
Tours provide information about the features that are relevant for the logged-in user. There are two tours:

- New User Tour – This tour automatically displays the first time a user logs in to Client Axcess. 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 Axcess after a major release. The tour displays release-specific information, including how to use the features added in the release.

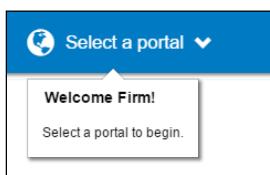


You can re-launch either tour from the user profile menu, located in the top right corner of the screen, at any time.

## Downloading Files from Client Axcess

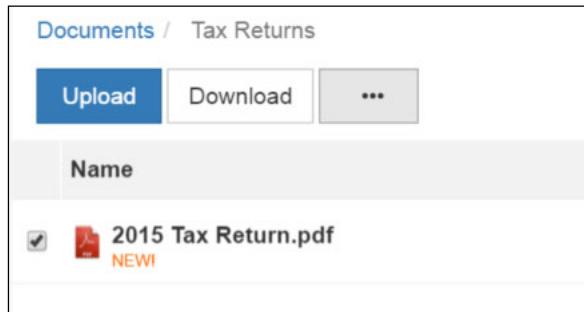


Name	Expiration Date	Date Modified	Modified By	Size
Provided by Client				
Tax Returns				
Financial & Accounting				



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



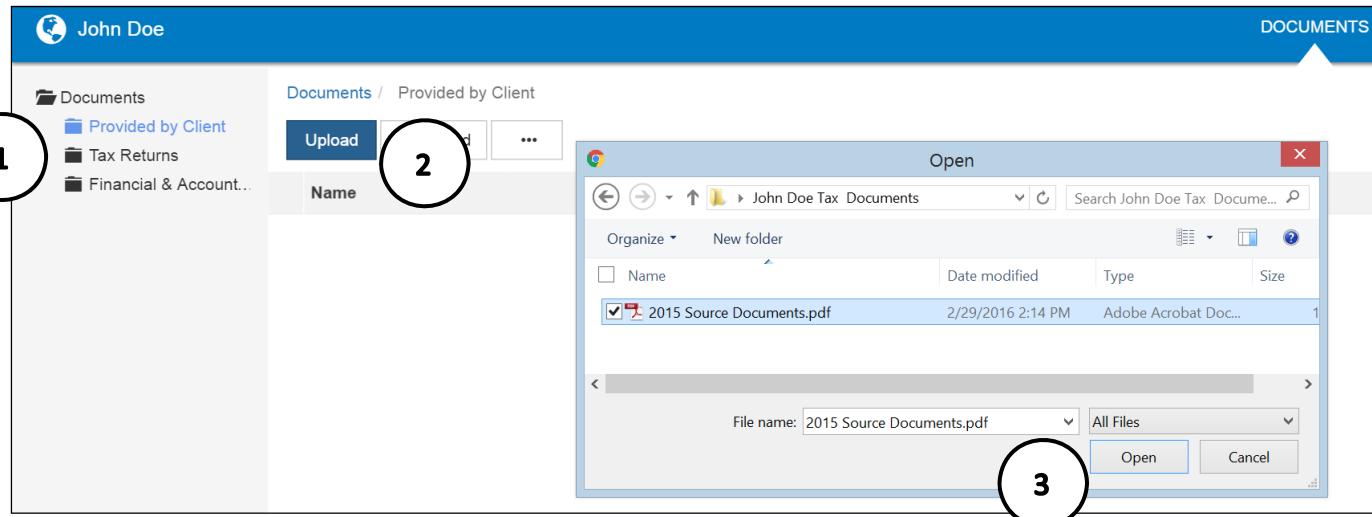
Name
2015 Tax Return.pdf NEW!

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.



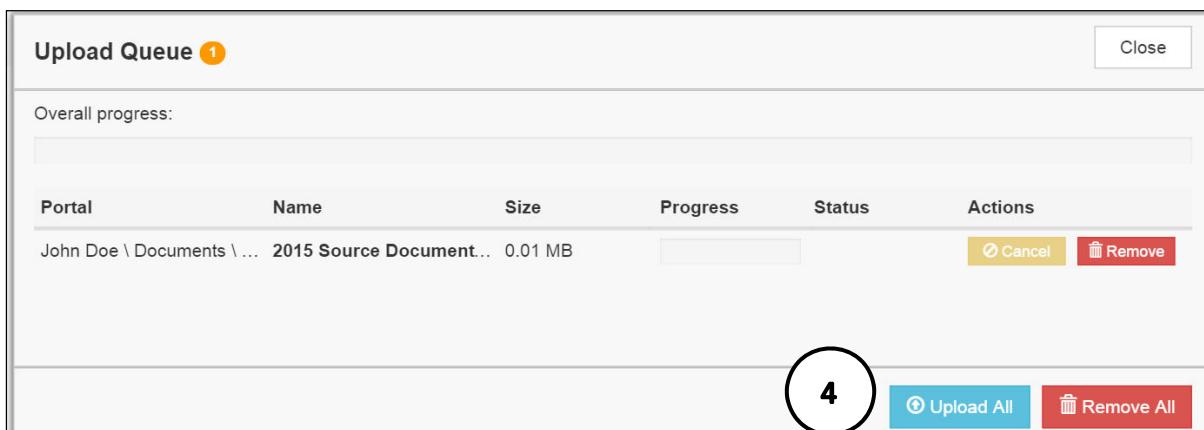
To download files, it may be necessary to disable your pop up blocker in Google® Chrome®, or other web-browsers.

## Uploading Files to Client Axcess



Follow the steps to add a file to you Client Axcess 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 Axcess. An email notification is sent to S.R. Snodgrass, P.C.

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



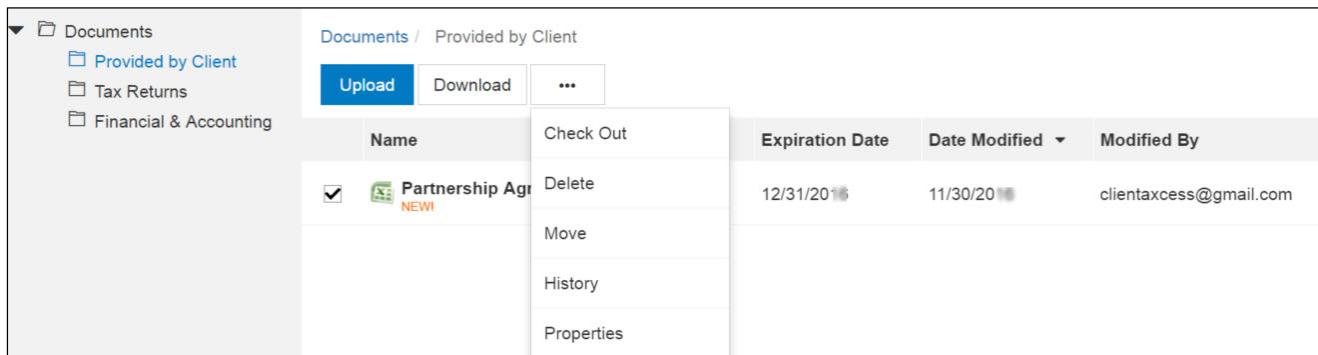
You can also drag-and-drop files into the destination folder to activate the Upload Queue. Once the Queue is displayed, click Upload All and your files will be added to Client Axcess.



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 Axcess

## Deleting Files

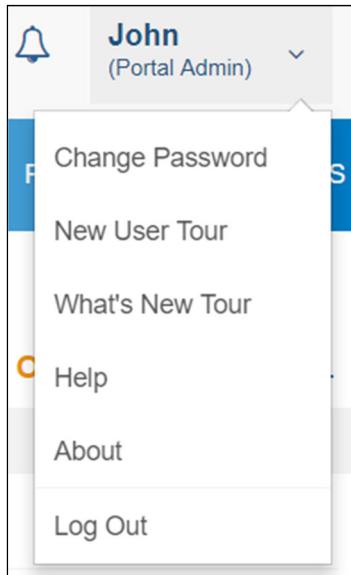


The screenshot shows the 'Documents' section of the Client Axcess interface. On the left, there's a sidebar with 'Documents' expanded, showing 'Provided by Client' (with 'Tax Returns' and 'Financial & Accounting' sub-options), 'Upload', 'Download', and a 'More' button. The main area shows a table with columns: Name, Check Out, Expiration Date, Date Modified, and Modified By. A file named 'Partnership Ag' (with a 'NEW!' badge) is selected, and a context menu is open over it, listing 'Delete', 'Move', 'History', and 'Properties'. The 'Delete' option is highlighted with a checkmark.

 You can **not** delete files uploaded by S.R. Snodgrass, P.C. 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 Axcess.

 If you would like to have a file added by S.R. Snodgrass, P.C. or another Portal user removed from Client Axcess, follow the steps above, but choose the option **“Request for Deletion,”** which will be displayed instead of the Delete, and will email to S.R. Snodgrass, P.C. notifying us that you want the file to be deleted.

## Changing Passwords and Logging Out



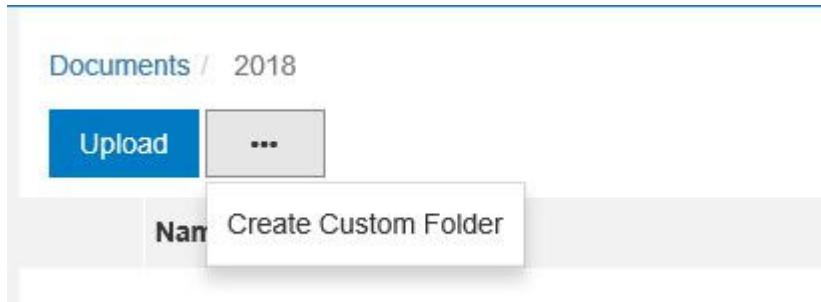
 At the top right-hand portion of the page, click the arrow to view your user options. From this menu you can change your password view the Guided Tours, or Log out of Client Axcess.

## Viewing a File's History

You can view all actions that have taken place for a particular file. Check the box to the left of the file name, and then click the **More Options** button. Select **History**.

## Creating a New Subfolder

Go into the folder in which you want to create a subfolder. Select the More Options button and then **Create Custom Folder** next to Upload. Type in the folder name and click Continue. Once created, the folder can be renamed or deleted.



## About the System

The client portal utilizes an RSA 2048-bit digital certificate to encrypt all information transferred between the website and each user's browser. Digital certificates use SSL (secure sockets layer) technology to protect data sent to or from a user.

## Questions

Please contact [portaladmin@srsnodgrass.com](mailto:portaladmin@srsnodgrass.com).