



Tax & Accounting

## CCH Access™ Portal

Workflow

At the center of a well-run firm is the right technology — technology that fuels firm growth, supports effective firm management and protects the firm's reputation. That solution is CCH Access™ — the tax and accounting profession's first modular cloud-based tax preparation, compliance and firm management solution.

CCH Access Portal is a secure electronic storage space that provides bi-directional file exchange capabilities that make it easy for you to securely deliver and receive client documents, facilitating collaboration and supporting the upload of even the largest files.

### Improved Client Service

With CCH Access Portal, your clients will experience unmatched convenience through instant access to their documents — including tax returns, financial statements and source documents. Meanwhile, your firm will benefit from reduced overhead and greater efficiency.

CCH Access Portal provides more than just simple file exchange. In addition to giving clients and staff access to vital documents immediately from any location, CCH Access Portal helps you and your clients:

- Designate files as **Read-Only** or **Read/Write** for easier access and greater security.
- **Check out** documents to prevent other users from editing while they are being updated.

- **Search, filter and display** documents by file type, title, creator, keyword and more.
- Upload and download via the new **Simplified User Interface** — a new option for users who only want a simplified access method, compared to the standard, full-featured user interface.
- Extend access rights and security with **Folder Level Security**.

### Expand Communication

With CCH Access Portal, you can share PDF files, web pages, hyperlinks, Microsoft® Excel® spreadsheets, Microsoft® Visio® diagrams, Microsoft® Word documents, Microsoft® PowerPoint® presentations and financial software data files, among others. For example, your clients can now upload their Intuit® QuickBooks® files to the CCH Access Portal, eliminating the need to exchange DVDs.

### Collaboration Made Simple

Taking advantage of instant access lets your clients view their documents with minimal effort on the part of your firm.

- **Tax returns** — With CCH Access Portal, a single mouse click makes an entire tax return available for the client's review. After reviewing the return, your client simply signs the e-filing release and faxes it to you. The return is now ready for electronic filing.
- **Financial records** — Clients often need the prior two years' tax returns to secure bank loans or for legal purposes. Simply publish the tax returns and source documents to CCH Access Portal, and your client can securely access them at any time.

*“Our clients love the idea of being able to access any document at any time and appreciate the added value we can deliver.”*

— Ryan Hagan,  
Founding Partner, Altruic Advisors

### Integration

CCH Access Portal tightly integrates with the other modules of CCH Access, including CCH Access™ Tax, CCH Access™ Document and CCH Access™ Practice. It also integrates with CCH® ProSystem fx® Engagement and CCH® ProSystem fx® Document.

- **CCH Access Tax** — Use CCH Access Portal to collect source files. You can print organizers from CCH Access Tax to CCH Access Portal to save time and postage. Then print the completed return to CCH Access Portal so clients can access it throughout the year and in the future.
- **CCH Access Practice** — Publish invoices to CCH Access Portal for faster billing, and capitalize on email notification features that remind clients to check the portal for new files.
- **CCH ProSystem fx Engagement** — Publish workpapers to CCH Access Portal and import client-provided files directly using the Insert Workpaper Wizard. This bi-directional integration is a best-in-process approach that will save your firm time.

### Open Integration Platform

Thanks to Wolters Kluwer's revolutionary Open Integration Platform, our cloud-based products can integrate with virtually any third-party or home-grown application. If your third-party vendor doesn't currently integrate with CCH Access Portal, you can ask them to build an integration, or you can have your firm's IT resources program the integration using an open integration kit.

### Security — How Your Clients' Files Stay Private

CCH Access Portal was designed from the ground up to take optimal advantage of an online environment while ensuring the privacy of your clients' files. Because CCH Access Portal resides on Wolters Kluwer servers in our secure Class 4 data center, you can be confident that your data is secure. CCH Access Portal provides:

- **Password-protected access** — CCH Access Portal utilizes 256-bit, Secure Socket Layer (SSL) encryption with password protected access. Since documents are hosted at the Business Logic Layer, users can only log in with a unique username and password.
- **Secure file encryption** — Files are encrypted immediately upon upload to CCH Access Portal and remain encrypted even when not being accessed. Files remain encrypted while being passed over the Internet.
- **Automatic virus scan** — For added protection, files are automatically scanned for viruses before being stored. All files are maintained behind secure firewalls to protect against outside intruders.

### Delivering an Optimal Solution

CCH Access Portal functionality is not limited to sharing files with clients — it can also be used to facilitate collaboration among firm staff and for external business transactions.

- **Portals** — Portals deliver full capabilities required to service a firm's business and individual clients. Clients can add multiple client users to improve collaboration with employees, family members and third parties like lawyers and banks.
- **Client areas** — These are designed for clients to have a secure portal area for their external business or investment activities. The Client Area is accessible only by client users and the external entity. Client portals can be made available to clients by the firm as a value-add service or to help differentiate the firm from the competition.

### Helping Your Clients

Once educated about portals, clients are consistently satisfied with the experience. Wolters Kluwer provides a number of tools to help you improve client adoption of portals:

- **Welcome emails** — CCH Access Portal welcome emails can be customized to help clients understand how and why to use the portal.
- **Client user guide** — This Microsoft® Word document can be branded and customized with your firm's logo and other information. The guide can be sent to clients as needed, or you can include a link in the welcome email notification to ensure all clients have assistance when learning to use CCH Access Portal.
- **Client-ready video** — This short video includes on-screen detail and narration addressing the basic use of CCH Access Portal.
- **Best practices consulting** — A Wolters Kluwer expert will walk you through several best-practice implementation strategies that will ensure the best results.

### For Clients on the Go: CCH® Client Access

The client-facing side of CCH Access Portal has gotten easier to use and more mobile with the introduction of CCH Client Access, which brings a new dimension of productivity and client service to the world of secure file sharing. Benefits include:

- Access to files from any web browser on a desktop (PC or Mac), tablet or smartphone — no Microsoft® Silverlight® or plug-ins needed!
- A client-facing mobile app for iPhone®, iPad® and Android™ devices.
- Simple drag and drop interface for uploading files on a desktop computer.
- Ability to take photos with a smartphone or tablet and upload them to CCH Access Portal.

