

CCH Access™ Portal Quick Start Guide

<https://portal.cchaccess.com>

Introduction to Your Portal

CCH Access Portal is an easy-to-use tool that allows the firm to securely exchange files with you using an intuitive folder structure, just like on your computer. You will receive email notifications when a portal is created for you that include a link to your portal and your temporary password.

The full version of your portal may require you to install Microsoft® Silverlight® (Silverlight®), which is safe, quick, and easy. If you cannot install Silverlight®, prefer not to do so, or are using a mobile device or unsupported browser, a link to the Non-Silverlight interface of Portal is included. You can use this interface to download and upload your files, but the advanced portal functionality is not available in this simplified version.

Logging In to Your Portal

Your email address is your Login ID. The first time you login to Portal, use the temporary password sent to you in an email notification. If you ever forget your password, click the **Forgot Your Password** link.

The checkboxes labeled *Remember me* and *Remember my password* should only be selected on a safe computer, never on a shared computer (like a public terminal at a library).

Browsing to Your Files

Once you have logged in successfully, you will see the Portal homepage and be able to proceed directly to the Files & Folders area in the middle of the screen. If you know where the file is located, browse to it as you would on your computer. If you do not, use the Search box at the top right of the homepage to quickly find it.

Advanced users may have multiple portals. Use the Navigation Pane on the left to select the desired portal.

Accessing Your Files

Once you have located your file, double-click on it to open or save it to your computer. If you prefer, you can also right-click on the file and choose **Download** from the menu that appears. For most, this will initiate your browser's normal download procedure. A small pop-up will also appear at the bottom right portion of the screen for those whose Internet Explorer security settings prevent downloading files. If you are using Internet Explorer and a download prompt does not appear, click the link in the small pop-up to force the download.

Uploading Files to Your Portal

Send a file to the firm by dragging and dropping it into a folder on your portal that matches the description of your file. Many firms will have a folder specifically labeled for you to drop files into. This procedure is very similar to moving or copying files on your computer. The file will appear in the portal folder as partially transparent compared to the other files, meaning that it is ready to be uploaded. After dragging and dropping all of the files you want the firm to receive, click **Upload Files** at the top of the Files and Folders area to complete the upload.

An alternative to dragging and dropping files into Portal is to double-click on the folder that you want your file to reside in and then click the **Add Files** button. When you click **Add Files** you will be prompted to browse to the file(s) on your computer. After selecting the file or files you want to send to the firm, click **Upload Files**.

If you see that your newly uploaded files are tagged with a yellow **NEW** icon, the upload was successful and the firm can retrieve your documents.