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FIRM MANAGEMENT

2019 Review of CCH Axxess Portal

Designed for accounting professionals, CCH Axxess Portal is a module in the CCH Axxess cloud software solution from Wolters Kluwer. CCH Axxess Portal can be used as a stand-alone portal, or used in conjunction with other CCH Axxess modules for a more ...

Mary Girsch-Bock • Oct. 18, 2019



CCH Axxess Portal

Wolters Kluwer

[Taxna.wolterskluwer.com](https://taxna.wolterskluwer.com)

[From the 2019 reviews of client portal systems for accounting firms.](#)

Designed for accounting professionals, CCH Axxess Portal is a module in the CCH Axxess cloud software solution from Wolters Kluwer. CCH Axxess Portal can be used as a stand-alone portal, or used in conjunction with other CCH Axxess modules for a more integrated practice management solution.

As a cloud-based application, CCH Axcess Portal is accessible from a desktop or workstation computer, as well as a tablet or laptop. A mobile-optimized website is also available for iPhone, iPad, and Android devices. The CCH Axcess Portal is completely customizable, so firms can brand the portal as desired.

CCH Axcess Portal users can access the application from any web browser. The portal supports a variety of file types including PDFs, web pages, spreadsheets, Microsoft Word documents, PowerPoint presentations, and data files from a variety of software applications including QuickBooks. Along with documents from other CCH Axcess and CCH ProSystem *fx* applications, users can upload documents into the portal using the drag and drop interface. The portal also offers a document check-out option, that allows authorized users to edit the document while also preventing others from modifying the document while it's being edited. Users can also designate specific documents as Read Only in order to prevent any unauthorized changes to a document. In addition, firms can assign folder-level security options for additional security.

CCH Axcess Portal offers bi-directional capability, and offers excellent document search options, with users able to search for documents by file type, creator, keyword, or title.

In addition to allowing clients and firms to safely and securely exchange documents, CCH Axcess Portal also offers document storage capability, allowing clients to access both current and historical tax data by storing it in the portal.

The application also includes email notification capability, allowing both firms and clients to send and/or receive an email notification when a document has been uploaded or downloaded to the portal, with a second email sent when the document has been accessed.

Firms have the option to choose which clients can have access to the portal. Once these clients have been identified, firms can send a welcome email to the client, which explains portal functionality and includes a link for the client to access the portal. A client user guide is also sent, which like the portal itself, can be branded with a firm's logo and other information. Once a client has been given portal access, they can provide portal access to their own colleagues, partners, and employees if necessary.

CCH Axcess Portal, like all CCH Axcess modules, offers excellent security options, with all files stored on Wolters Kluwer servers that are located in a Class 4 data center. The

product uses TLS 1.2 encryption with password protected access, so only users with a unique user name and password can access files. All files are encrypted immediately once uploaded, and remain encrypted during transmission and while inactive. In addition, every file uploaded to CCH Axxess Portal is scanned for viruses prior to being saved on the Wolters Kluwer servers.

CCH Axxess Portal offers seamless integration with other CCH Axxess modules including CCH Axxess Practice, CCH Axxess Document, and CCH Axxess Tax, which allows users to use the portal to request source documents from clients by printing organizers for clients to access from the portal. Once a return is completed in CCH Axxess Tax, it can be printed to the portal, where clients can access it at any time throughout the year. CCH Axxess Portal also integrates with both CCH ProSystem *fx* Engagement and CCH ProSystem *fx* Document.

CCH Axxess Portal offers solid help and support options, with help functionality easily accessible from the user interface. Additional support options include access to hot support topics, FAQ's, various user guides, as well as the ability to search for answers. A variety of training options are also available including standard product training as well as access to a variety of online and self-study classes. Support for CCH Axxess Portal is available during regular business hours, with support reached via telephone, chat, or by requesting support via the website.

CCH Axxess Portal can be a useful tool for accounting firms of any size, but can be particularly useful for firms already using other CCH Axxess modules. CCH Axxess Portal prices vary, with users able to request a custom price for their firm directly from Wolters Kluwer.

2019 Rating: 5 Stars

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