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Wolters Kluwer

CCH Axxess Portal

<https://taxna.wolterskluwer.com>

From the **2020 reviews of client portals** for accounting firms.

CCH Axxess Portal is a cloud-based file sharing system best-suited to firms using CCH Axxess Document as the tight integration means these solutions function like one streamlined application. The system also integrates with other components of the Wolters Kluwer professional accounting suite. One strong feature of this solution is its ability to let clients pay their invoices online, which can be achieved via integration with CCH Axxess Practice. CCH Axxess Portal can be used on desktops, laptops and mobile devices.

Clients access the system through the CCH Client Axxess interface, which can be used on standard web browsers, with users able to store most file types, including Word and Excel, PowerPoints, PDFs, web pages, presentations, and data files including QuickBooks. The system uses a traditional drag-and-drop function for uploading

documents into the portal, or users can save to a client portal folder from within

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their shared folder, such as historical tax and financial documents, which they can download whenever necessary.

A useful feature is email notifications that notify firm or client users when a new document has been uploaded, downloaded, edited or deleted. This information, along with user access and editing functions, are all logged by the system's audit trail.

CCH Axcess Portal and all files stored by firms and clients is hosted on Wolters Kluwer servers in a Class 4 data center, with all data remaining encrypted at rest or while in transit.

CCH Axcess Portal natively integrates with other applications in the CCH Axcess suite, including CCH Axcess Practice, CCH Axcess Document, and CCH Axcess Tax, as well as with CCH ProSystem *fx* Engagement and CCH ProSystem *fx* Document. Through this integration, clients can upload and share income and other tax source documents with the firm, which can then be imported into the tax system or other areas of the program. Likewise, completed (or in-progress) returns can be shared with clients via the portal.

Built-in support functions are easy to use, and online support options include FAQs, user guides, and hot topics. Several online training tools are provided, such as self-study classes. Live support is available within the program, by phone, text and email during business hours.

CCH Axcess Portal is an essential solution for firms using other CCH Axcess programs, to enable digital sharing of files with clients. Pricing varies based on users and other applications, so pricing is available through Wolters Kluwer.

2020 Rating: 5 Stars

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