



TAX PORTAL USER GUIDE

CCH Client Axxcess™ User Guide

About the Argent Wealth Management CCH Client Access Portal

At Argent Wealth Management, we take the privacy and security of your information seriously. That is why we use the CCH Access Secure Client Portal for transmitting confidential tax and financial information with each client. A Portal User ID and login instructions are provided to each Argent client via email. All documents made available to each client on the Argent CCH Client Access Portal can be printed or transferred to another file on your computer or permanently deleted by you as you see fit.

We are always available to help with any questions you may have in using the Access Portal. We can be reached at 781-290-4900. Thank you.

CCH® Client Access

<https://www.clientaccess.com>

CCH® Client Access allows you to receive and share files with Argent from any web browser or operating system.



It is important to note that based on Argent's portal configurations, you may not have access to every feature covered in this guide.



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

Logging in to Client Access

For added security, Argent 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, click the authentication link in your Portal welcome email. You will be asked how you would like to receive your authentication code. You may select to receive your authentication code via email, text message (if available) or voice prompt via telephone (if available).

Your Login ID is your email that received the tax portal invitation from Argent.

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

Figure 1

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

Figure 2

Once you have submitted the code, you will be prompted to set up your password.



Login Tips

- **Your Login ID is your email that received the tax portal invitation from Argent.**
- 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 "**I Forgot My Password?**".
- If prompted, review and agree to the Argent end user license agreement. You can also download a copy.

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 Access. 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 Access 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 Axxess

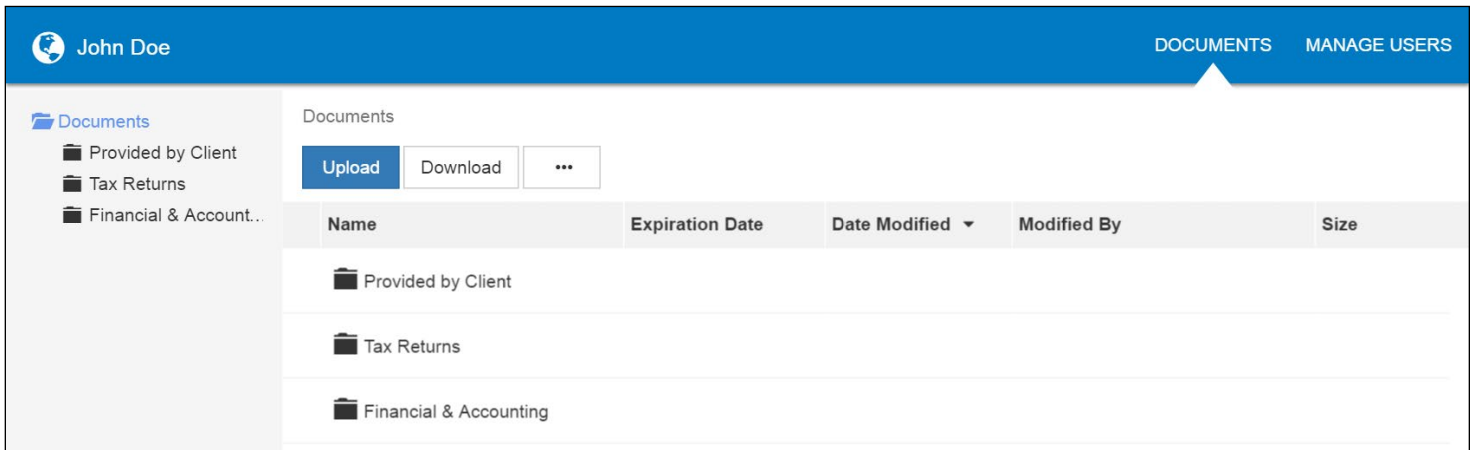


Figure 3

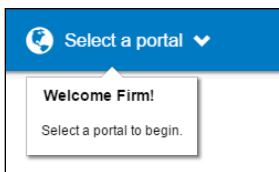


Figure 4



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

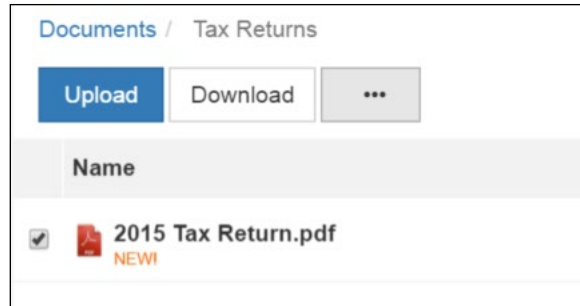


Figure 5

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 Access

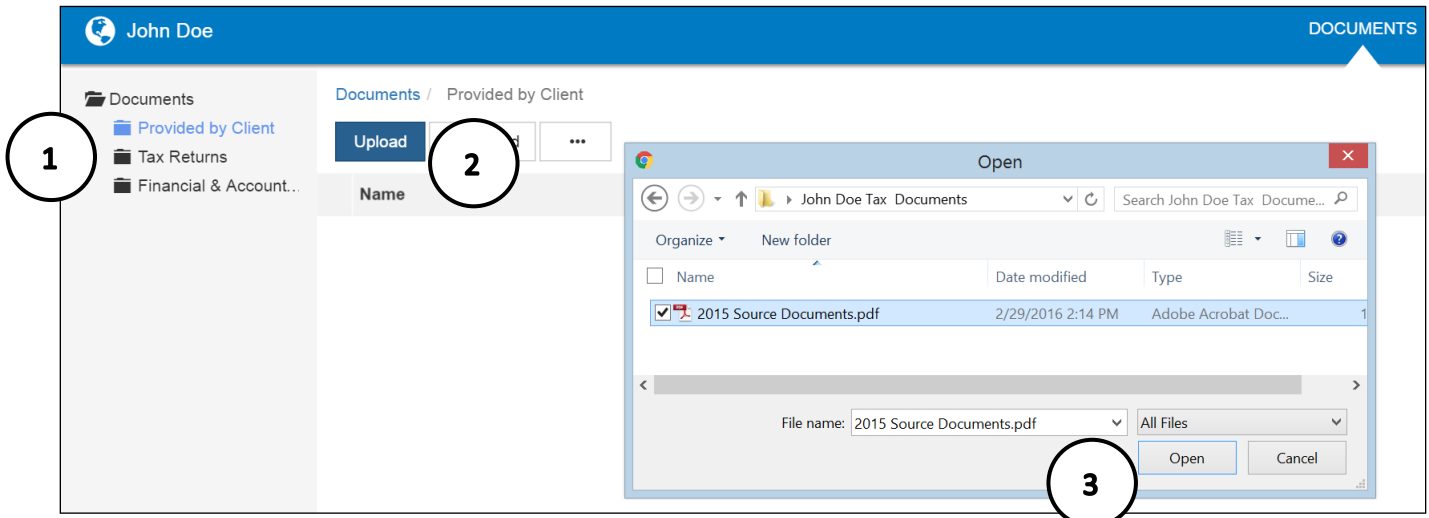


Figure 6

Follow the steps to add a file to you Client Access 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**

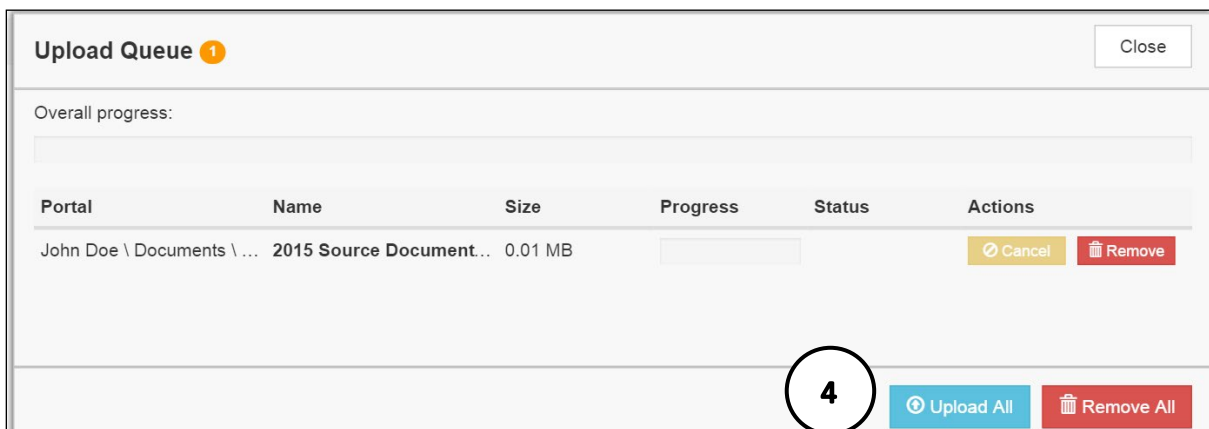


Figure 7


4. The **Upload Queue** will launch automatically. Click **Upload All** to upload the displayed file(s) to Client Access. An email notification is sent to Argent .

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



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 Access.



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 Access

Deleting Files

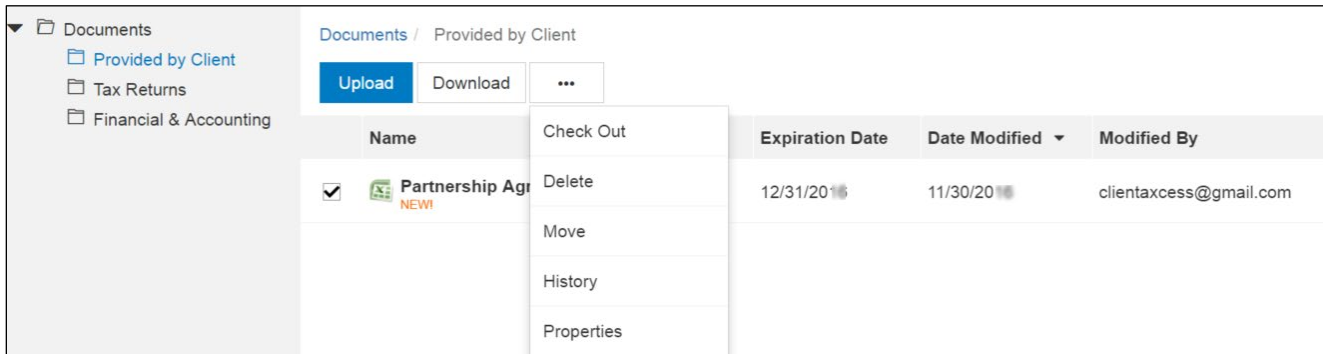


Figure 8



You can **not** delete files uploaded by Argent 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 Access.



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

Checking Out Files

Collaborate with Argent by using the Check Out feature to download a file, make changes, and then add the modified file back to Client Access. The file will be overwritten to reflect your changes upon Check In.

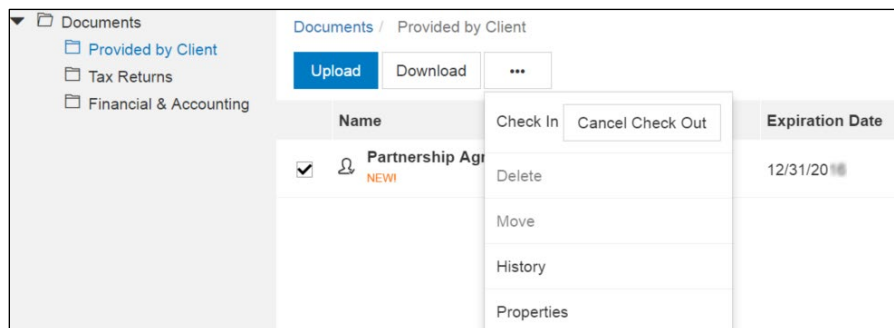


Figure 9

Steps to Check Out a file

1. Check the box to the left of the file name, and then click the **More Options** button
2. Select **Check Out**
3. On the **Check-out** prompt, click the **Due date to check in** field, and choose the latest date you expect to Check In the file, then click **Check Out**
4. When prompted by your web browser, save the file to your computer or network
5. Launch the file and make any desired changes, then click **Save** and close

Checking in Files

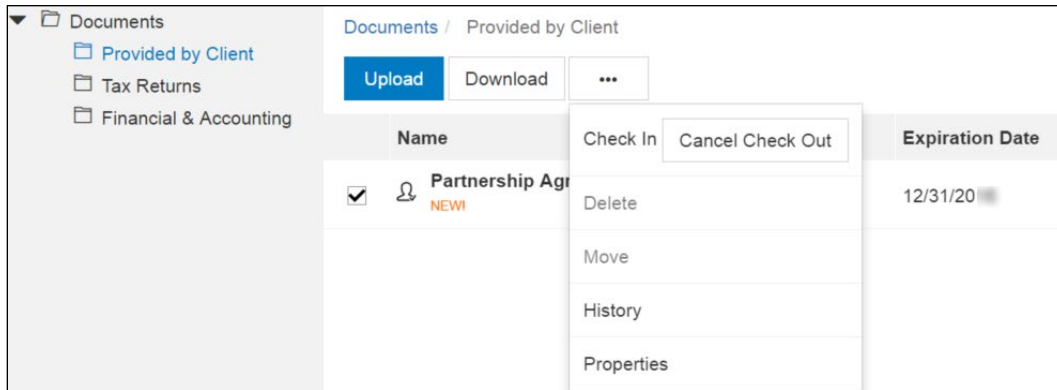


Figure 10

Steps to Check In a file

1. Log in to Client Access, browse to the folder where the checked out file is located
2. Check the box to the left of the file name
3. Click the **More Options** button, and select **Check In**
4. When prompted, click Browse and navigate to the checked out file on your computer.
5. Click **Check In**
6. You will receive confirmation the file has been checked in successfully

Changing Passwords and Logging Out

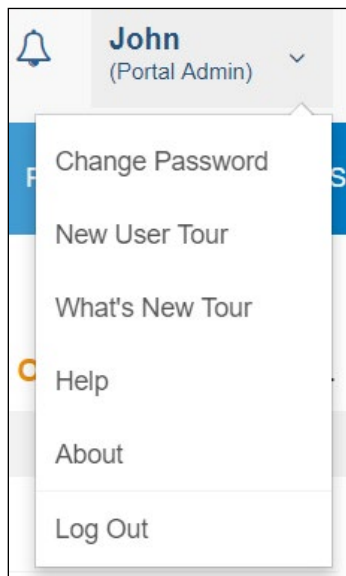


Figure 11



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 Access.