

CCH iFIRM – Client Portal – For Clients

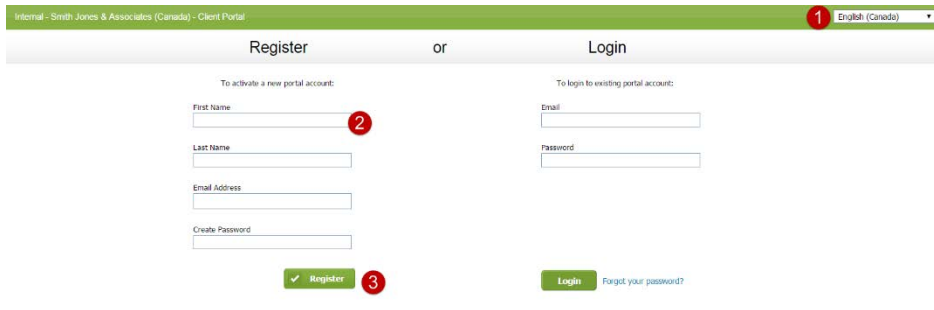
Your accountant has sent you an invitation to register to the firm’s client portal. The client portal service includes:

- Ability to view documents your accountant wishes to share with you.
- Ability to upload documents securely and share with your accountant.

Your accountant will upload documents for your information, and you will view them in the *My Documents* section of the portal.

Registering for the portal

You have received an email invitation, from your accountant, to register for the portal. Click the link included in the email invitation. This link will launch the following page:



1. Select the interface language.
2. Enter the information in the fields under *Register*.
3. Click the **Register** button.

Follow the instructions on the *Home* page of the client portal.

**If the link for the portal is deactivated in the email, copy and paste it into your Internet browser address bar.

Consulting your documents

You will receive an email to the effect that documents have been uploaded to your portal. A link to the portal will be included in the email. Once you click the link and that you have logged in to the secured portal:

1. Click **My Documents** in the left menu, if necessary. Otherwise, the folder to which the documents were uploaded will open.
2. If the documents are stored in a folder, open it.
3. Click the document you wish to view – it will download to your desktop.
4. Open the document.



Uploading a document

When you upload a document to your portal, your accountant will receive an email to that effect. **Note:** Avoid any special characters when naming files.


1. Click **My Documents** in the left menu.
2. If necessary, open the folder to which you wish to upload the document.
3. Click the **+ Upload** button.

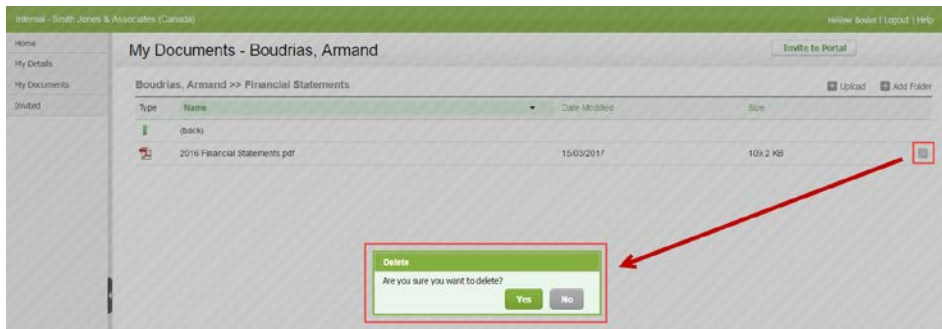



4. Click the **Upload File** button in the *Add Document* window.
5. Look for the document(s) you wish to upload. You can upload more than one file at the same time.
6. Click the **Open** button. The file(s) will be uploaded to the portal.

TIP: If you have multiple documents to upload, consider zipping them and uploading the .zip file instead.

Deleting a document**

1. Click **My Documents**.
2. Click the folder that stores the document, if required.
3. Click the **Delete** button  at the end of the row of the document you want to delete.
4. Click **Yes** to confirm.



If the **Delete icon  is not visible, you do not have the permission to delete documents.

View your details

Click **My Details** to view the details that are recorded in your accountant's database. If you notice that any of the information is wrong, you can inform your accountant of the error.

You can invite other people to use the portal by clicking the **Invite to Portal** button. They receive an email containing a link and they access the portal the same way you did. However, they are unable to invite other people. When they log in to the portal they cannot see the **Invite to portal** and **Invited** buttons. However, your accountant may restrict their access to your portal.

Logout

It is recommended that you log out of your portal when you wish to end your session by clicking the **Logout** button.