

KBST

Certified
Public Accountants
& Consultants

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CCH Client Access™ Portal

User Guide

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User Agreement

This Client Portal Agreement is made by and between Kahn, Berman, Solomon, Taibel & Mogol, P. A.(KBST&M) and you, the "Client", effective on the date it is executed by the Firm's authorized representative upon the following terms and conditions:

I. Purpose.

KBST&M provides a voluntary Client Portal (secure internet site) to permit easy and secure electronic transfer of documents between its Clients and the Firm; as well as ongoing Client access to certain documents created or maintained by the Firm. KBST&M has sole discretion to decide which types of documents can be uploaded or viewed on the Client Portal.

II. Service Availability

KBST&M will use its best efforts to provide 24-hour daily availability of the Client Portal. However, the Firm makes no representation or warranty that a 24-hour service will be available. The Client agrees and acknowledges that the Client Portal will, at times, be unavailable due to regularly scheduled maintenance, service upgrades, or other mechanical or electronic failures.

III. Supported Browser

The Client agrees to access the Client Portal using an up to date supported browser (Internet Explorer 7 (or higher), Microsoft Edge, Google Chrome, Mozilla Firefox, Safari).

IV. Security

KBST&M will use its best efforts to make the Client Portal secure from unauthorized access. The Client Portal operating system and application software will be updated and virus-scanned regularly. However, the Client recognizes that there is no completely secure system for electronic data transfer. KBST&M MAKES NO WARRANTY, EXPRESS OR IMPLIED, REGARDING THE EFFICACY OF THE SECURITY OF THE CLIENT PORTAL AND SHALL NOT BE LIABLE FOR ANY CLAIMED, ACTUAL, OR CONSEQUENTIAL DAMAGE ARISING FROM ANY BREACH OR ALLEGED BREACH OF SECURITY OF THE CLIENT PORTAL.

V. Logon Accounts and Their Security

The Firm will set up a single logon account for the Client. It is the Client's responsibility to set up additional accounts for users that work in their organization and third parties. KBST&M strongly recommends that the Client establishes a policy that logon information should not be shared among its employees.

VI. Termination of Logon Account

The Client is responsible for the termination of an individual logon account.

VII. Term and Termination

This Agreement and the services contemplated by it may be terminated by either KBST&M or the Client with or without cause and with or without notice at any time.

VIII. No Unlawful and Prohibited Use

Hacking, password mining, or any other means to gain unauthorized access to the portal, portal accounts, computer or network is prohibited. Posting or transmitting any unlawful, threatening, libelous, defamatory, obscene, scandalous,

inflamatory, pornographic, or profane material or any material that could constitute or encourage conduct that would be considered a criminal offense, give rise to civil liability, or otherwise violate any law is also prohibited. Firm will fully cooperate with any law enforcement, authorities, or court requesting or directing Firm to disclose the identity of any one posting any such information and materials.

IX. IRS Circular 230 Disclose

To ensure compliance with requirements imposed on June 20, 2005 by the United States Treasury, Firm informs you that any tax advice contained in communication (including any attachments) using the portal was not intended to be used and cannot be used for the purpose of 1) avoiding tax-related penalties or 2) promoting, marketing or recommending to another party any tax related matters addressed in this communication.

X. Miscellaneous

This is the entire agreement between KBST&M and the Client regarding its subject matter. This Agreement does not modify or affect any existing or future engagement letter or agreement between the Firm and Client. By submitting the form below the Client has read the above conditions and agrees to its terms.

Quick Start Guide

Portal Login

Launch your Web browser and browse to <http://portal.kbstm.com/>

Login Tips

- Refer to the emails received from the firm for login information.
- The Login ID (email address) is not case sensitive; the temporary password provided via email is case sensitive.
- For security reasons, you are required to change your password upon logging in for the first time.
- Your new password may be from 8 to 32 characters, must contain at least one alpha character, one numeric character, one special character (e. g.!, @, #, etc.) and is case sensitive.
- Your password may be reset at any time by clicking “Forgot your Password?”



The screenshot shows a web form titled "Account Login". It contains the following elements:

- A label "Login ID (Email address):" above a text input field with a dropdown arrow on the right.
- A checkbox labeled "Remember me" below the Login ID field.
- A label "Password:" above another text input field.
- A checkbox labeled "Remember my password" below the Password field.
- A blue "Login" button centered below the input fields.
- Three links at the bottom: "Forgot your password?", "Forgot me", and "Take me to the non-Silverlight login".

Portal Login

About CCH Client Access Portal

Portal is a simple and easy to use Web application that facilitates secure file transfers and continued access between KBST&M, P.A and our clients. For our clients, Portal is a web-based interface that only requires the installation of Microsoft Silverlight for use.

Your Portal User ID and login information will be provided via email. All documents made available for continued access such as a tax return or financial statement will remain on your portal for a stated period of time in accordance with KBST&M, P.A's record retention and portal use policies.

System Considerations

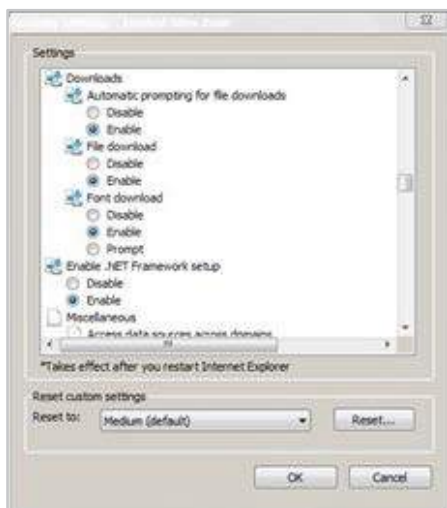
- Portal relies on the Microsoft Silverlight 5 platform and a user may be prompted to install Silverlight from Microsoft's website the first time they login. The install is completely safe and typically takes less than a minute and just a few clicks.
- Portal will support all browsers on PC and Mac that are compatible with Microsoft Silverlight 5.
- A complete list of browsers and operating systems that support Silverlight 5 can be found at <http://www.microsoft.com/silverlight/get-started/install/default.aspx>
- Mac computers with Intel processors are able to access Portal.
- If you are a Mac user, browse to the link below to verify your computer's processor type.
<http://support.apple.com/kb/HT1531>

Internet Explorer

Portal can be used with Internet Explorer version 7 or higher. Although not required for the use of CCH Client Access Portal, changing the following settings may allow for even easier use:



Internet Options



Custom Level

Internet Explorer Settings

1. Open Internet Explorer and browse to <http://portal.kbstm.com/>
2. In Internet Explorer: select **Tools, Internet Options**, click on the **Security** tab, click **Trusted Sites**, and then click on the **Sites** button.

3. Click **Add** to move the Portal URL to the Trusted sites zone, then click close.
4. Click **Custom level**.
5. Click **Enable** for Automatic prompting for file downloads.
6. Click **Enable** for File Download.
7. Click **OK** to save the changes.

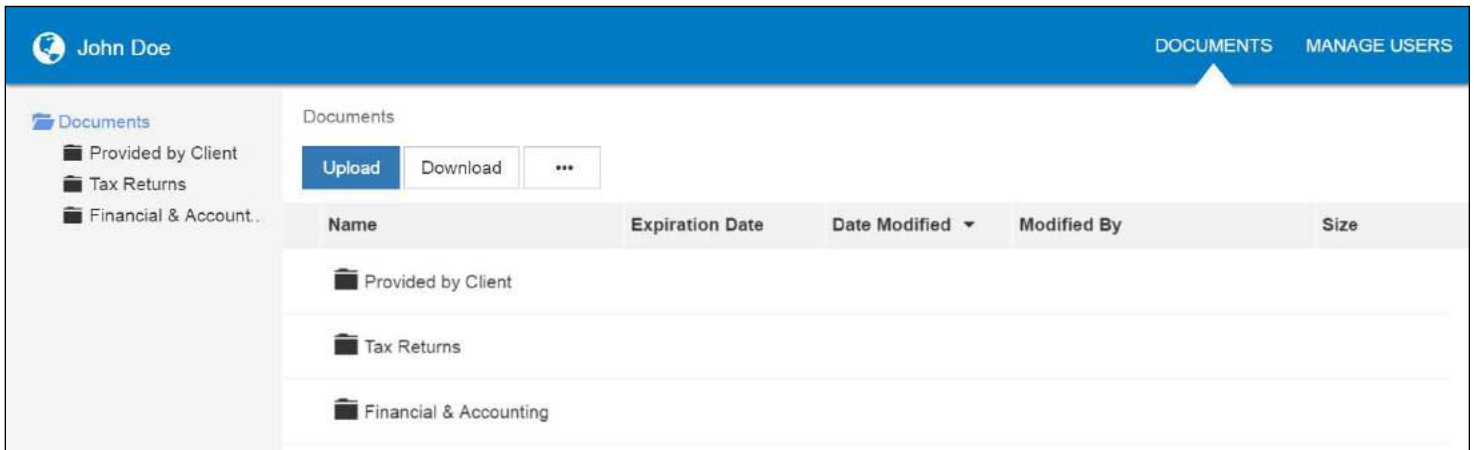
Non-Silverlight Mode

CCH Client Access Portal also includes a non-Silverlight mode which allows you to access the portal without having the plugin installed. This version is recommended for older browsers or browsers that don't support Silverlight.

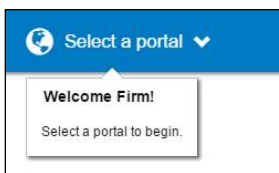
In order to access it, follow this link <http://portal.kbstm.com/SUI/>. You can also find a link to it on the login page.

Once in, this mode will work the same way as the normal version, however the layout and design will look slightly different.

Downloading files from Client Access



Client Access Home Page



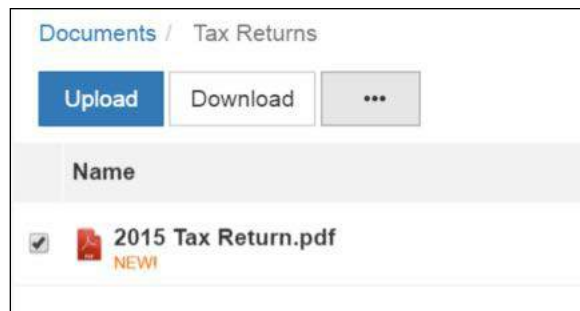
Select a portal



If you have access to more than one Portal, click **Select a Portal** at the top, left-hand portion of the page.



After logging in to Client Access, you will see a list of folders used to organize your files. **Click on a folder to display its files.**



Download Files

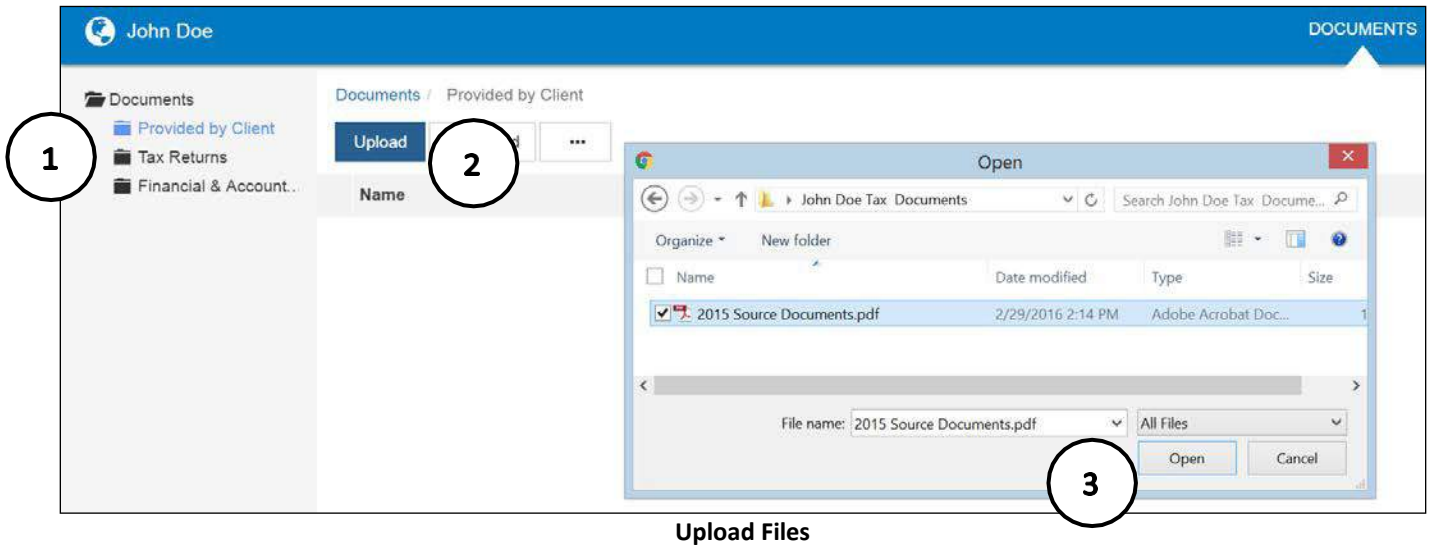


To download a file, simply click the file name or check the box and click **Download**, either option will launch your browser's file download prompt allowing you to open or save the file.



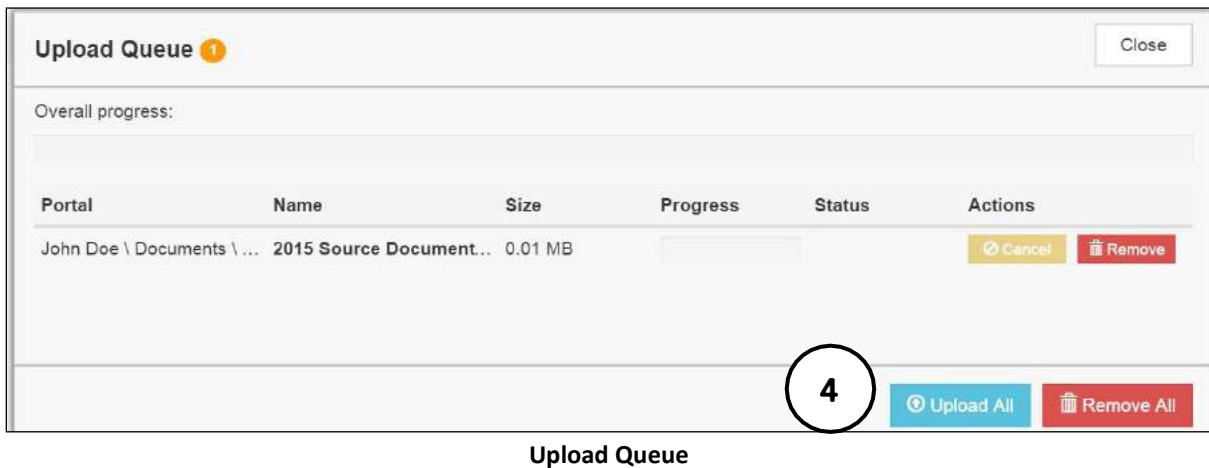
To download files, it may be necessary to disable your pop up blocker in Google® Chrome®, or other web-browsers.

Uploading files to Client Access



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**



4. The **Upload Queue** will launch automatically. Click **Upload All** to upload the displayed file(s) to Client Access.




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.



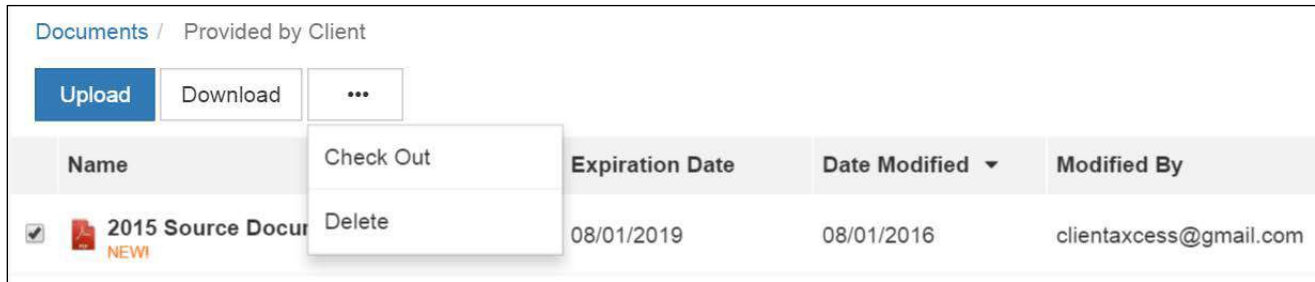
You can also drag-and-drop files into the destination folder to activate the Upload Queue. Once the Queue is displayed, click Upload All and your files will be added to Client Access.



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



Delete Files

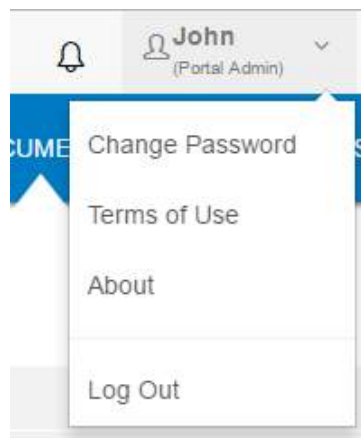
You can **not** delete files uploaded by KBST&M, P. A. or other Portal users.

You can  delete files that you upload. Click the box to the left of the file name, click the **More Options** (ellipsis) 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 KBST&M, P. A. 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 KBST&M, P. A. notifying us that you want the file to be deleted.

Changing Passwords and Logging Out



User Options



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 or Log out of Client Access.

Advanced Features

This section is intended to provide further assistance on the more complex features available to a Portal Admin user. The advanced features are optional, and are not required for each Client Access portal.

Portal User Roles

Portal Admin

The Portal Admin is the primary user for each Client Access portal. The Portal Admin may perform all portal-related functions, create other Portal Users and control access for other Portal Users. The Portal Admin user will be the only user that exists initially when a portal is created.

Portal User

A Portal User is created and granted access by the Portal Admin or the firm. Portal Users should only be created when Portal access is required by more than one person.

Example of Advanced Portal Use

- You may find situations in which it is practical to grant portal access to a third party. For example, a banker that you and the firm collaborate with on a regular basis. Before having access to Portal; options to exchange information included email, fax, CD-ROM, or hard copy paper, and in many cases you had to request the document from the firm before you could provide it to the bank. As the Portal Admin, you may create a Portal User allowing your banker access to requested documents and the ability to add files at the request of you and the firm; considerably reducing the time and resources spent to exchange information. The security level of Portal far exceeds email, which is most often the primary medium of exchanging electronic files.
- If the firm has created more than one portal for you, you will be able to control which portal(s) your banker or other third party may view.
- Your firm's portal solution, may or may not, provide you with the ability to secure folders. If available, this feature allows the Portal Admin to control a Portal User's access to one or more folders within a portal.

Managing Portals



The Portal Admin may grant portal access to others by creating Portal Users.

There are three steps to create Portal Users:

1. Create the Portal User
2. Grant the Portal User access to one or more portals
3. Choose the Portal User's File Management Role for each portal they are granted access

Create Client Access Portal Users Continued:

Portal Name	File Management Role	Grant Acces...	Access Expiration
John Doe	Limited User	<input checked="" type="checkbox"/>	12/31/2016

Assign Portals to a Portal User



Assign a Portal User to a Client Access Portal

1. Initially, only the portal you are logged in to displays, check the **Grant Access** box to allow access to this Portal. Click **Assign more portals** to grant the new user access to other portals the firm has created for you, if applicable.
2. If necessary, modify the assigned **File Management Role** for the selected Portal.
3. To prevent long-term access, select an **expiration date** for the user's access to this portal (optional).
4. Select **Save and Close** to create the Portal User. Emails containing login information will be sent to the login ID (email address) of the Portal User.

Editing or Deleting Client Access Portal Users

Last Name	First Name	Email	Grant Acces...	Access Expiration
Banker	Jim@gmail.com	<input checked="" type="checkbox"/>	11/30/2016

Edit or Delete a Portal User



Access to a Portal may be modified or terminated at any time. In the **Manage Users** window, click the box to left of the user's name, and then click the **More Options** (ellipsis) button to delete the user, or click the **Edit** button to modify.



It is important to terminate access when no longer needed by the Portal User. If you need assistance please contact KBST&M, P. A.

About File Management Roles

There are five File Management Roles that can be assigned:

1. **Administrator** – Allows Portal Users to perform all file operations.
2. **Standard User** – Allows Portal Users to perform the most common file operations.
3. **Limited User** – Allows Portal Users to perform a limited number of file operations.
4. **Read-only User** – Allows Portal Users to download files and review related information.
5. **Upload-only User** – Allows Portal Users to upload files and review related information.



It is our recommendation that **Administration rights NOT** be granted to Portal Users.

Create Client Access Portal Users

The screenshot shows the 'Manage Users' interface for John Doe. At the top, there is a navigation bar with 'John Doe' and a dropdown arrow, and 'DOCUMENTS' and 'MANAGE USERS' tabs. Below the navigation bar, there is an 'Add User' button on the left and a search bar with 'Search for a user' and a 'Search' button on the right. The main area contains a table with the following columns: 'Last Name', 'First Name', 'Email', 'Grant Acces...', and 'Access Expiration'. There are two rows of data in the table:

<input type="checkbox"/>	Last Name ▲	First Name	Email	Grant Acces...	Access Expiration
<input type="checkbox"/>	Banker	Jim	██████████@gmail.com	<input checked="" type="checkbox"/>	11/30/2016
<input type="checkbox"/>	Doe	John	██████████@gmail.com	<input checked="" type="checkbox"/>	██████████

Add Portal User



From the Client Access home page, click **Manage Users**, then click **Add User**.

The screenshot shows the 'Create Portal User' form. At the top, there is a navigation bar with 'Jim (Portal User)' and a dropdown arrow. Below the navigation bar, there is a header 'Add a user to John Doe's portal' and 'Cancel' and 'Save and Close' buttons. The main area contains a form with two tabs: 'User Profile' and 'Assigned Portals'. The 'User Profile' tab is active and contains the following fields:

- *Login ID (email address): newuser@email.com
- *Default security user role: Limited User (dropdown menu)
- *Last name: User
- *First name: Portal

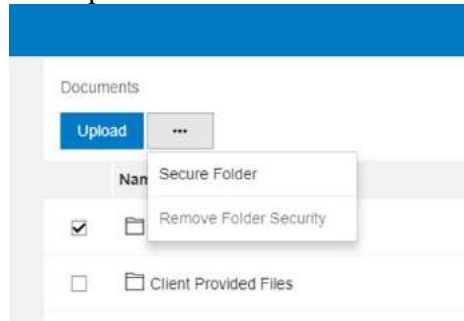
Create Portal User



On the **User Profile** tab, enter the Login ID (email address), last and first name of the user; these are the only items that are required. The next step is to click the **Assigned Portals** tab.

Folder Level Permissions

Portal Admin Users have the ability to restrict specific Portal Users from accessing selected folders within Portal.



Secure Folder

Steps for Creating Folder Level Permissions

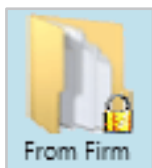
1. Choose the folder you wish to secure
2. Click the “...” button
2. Select *Secure Folder*
3. Choose Portal Users that will have rights to the folder by clicking the box to the left of the user’s last name

	Last Name	First Name	Email
<input checked="" type="checkbox"/>	Firm	Administrator	Nate.Brown@wolterskluwer.com
<input type="checkbox"/>	Nate	Brown	irish.nate.1979@gmail.com
<input type="checkbox"/>	Mary	Brown	mbrown.portal@gmail.com

Apply Folder Level Permissions to Portal Users

4. Apply Folder Level Permissions to Portal Users
5. After selecting the Portal Users that will have access to the folder, click *Save*
6. A popup will display confirming the selected folder has been secured

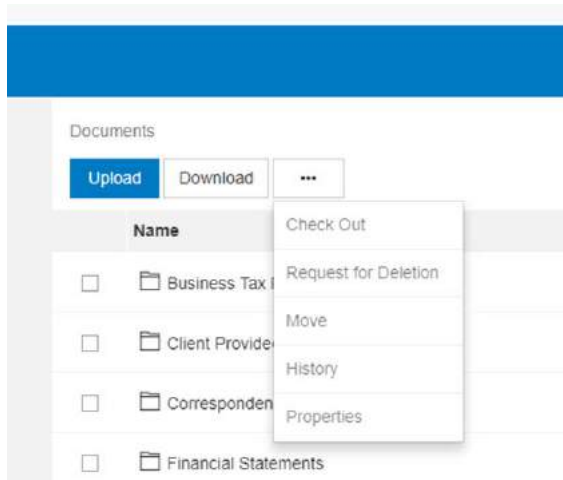
To modify folder level permissions, right-click on a secured folder and select *Remove Folder Level Security*.











Secured folders are easily identifiable as a lock icon is visible when navigating to folders on the Portal Homepage.

The “...” Menu

To access the “...” *Menu*, select any file.

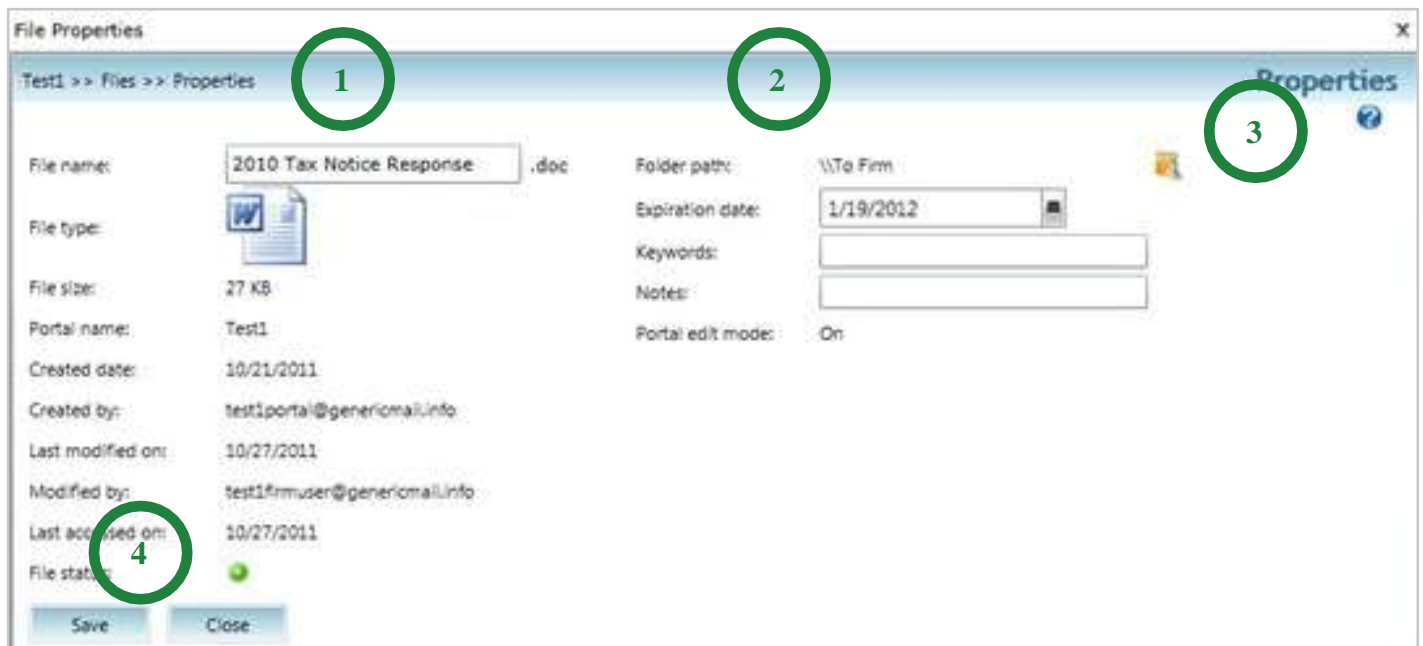


“...” Menu Features

 Check-out	Download the file to edit and add back to Portal. The file will be overwritten to reflect your changes upon Check-in.
 Check-in	Add a checked-out file back in to Portal to reflect any changes made.
 Cancel check-out	Make it as if the Check-out never occurred. Any changes to the file will be lost.
 Download	Select to open or save the file; this is the same as double clicking on a file.
 Request file deletion	Send an email to KBST&M, PA to let us know that you would like the file to be deleted.
 Move	Move the file to another folder. If applicable, you can choose to have Portal change the file's expiration date to match the new folder's retention settings.
 History	View a complete history of each operation performed on a file.
 Properties	View and modify properties such as file name, keyword, and folder location.

When checking out a file, you will have an option to email the file as an attachment. It is important to note this attachment will *not be* encrypted.

File Properties



File Properties

File Properties Key Features

1. Rename a file (note that you do not need to worry about the extension, e.g .docx, .xlsx, etc)
2. In this area, you can modify the file's Keywords and Notes. The file's Expiration Date can be changed here as well, if appropriate.
3. Click to change the folder location of a file, thereby moving the file to that folder.
4. Click Save, and then Close to apply all changes.



Because file expiration dates may be determined by reference to certain legal or professional requirements, please check with KBST&M, P.A. prior to making changes.