



CLIENT PORTAL INFORMATION GUIDE

IF YOU HAVE FORGOTTEN YOUR PASSWORD, OR HAVE NEVER RECEIVED AN INITIAL EMAIL TO SET UP YOUR PASSWORD

1. Go to: <https://www.clientaccess.com/#/login>
2. Click on **Forgot Password?**, leaving the User ID and Password blank.
3. On the next screen, enter your full email address and the characters in the blue box. Click **Next**.
4. Select an email address or cell number to receive your temporary password.
5. After receiving your temporary password, enter it in the box indicated.
6. You will then need to answer the security questions and create a permanent password.

HOW TO ADD A PORTAL USER

1. If you have more than one portal, select a portal from your list to the left of the page under **Select a Portal**.
2. Click on the portal you wish to access. Once there, click on **Client Users** at the top right of the page, just under your name and to the right of Files. (**Note:** If you currently have more than one user portal, the other users will show up on a list here.)
3. Click on **Add New User** to the left of the page. Enter all required information, then click **Save and Close** to the right of the page.

Note: If you want a user to have access to more than one portal, follow the above steps in each portal.

HOW TO DELETE A PORTAL USER

1. If you have more than one portal and the user has access to all or some of the portals, you can choose to remove access to the current portal only. To do this, simply uncheck the **Grant Access** box and check **Yes**. The user will disappear from the current portal but will still have access to other portals linked to their name.
2. If you wish to delete a user completely from a portal, check the box to the left of the user's last name. Click on the box with the 3 dots next to the Edit box and click **Delete**. Select **Yes** to confirm permanently deleting this user.



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Notes:

- If trying to delete a user who is currently logged into the portal, a confirmation box will appear asking if you would like to continue with the deletion of the user.
- If the user you are trying to delete is a portal administrator on any portals, you will not be able to delete this user. You will have to contact CJBS directly to have the user deleted.

HOW TO RESTRICT FOLDER ACCESS

1. Click on **Files** at the top of the page. Check the box of the folder you wish to secure. (You can only secure one folder at a time.) Click on the box with the 3 dots next to the **Upload** box and select **Secure Folder**. A list of users will appear. Uncheck those you wish to restrict access and click **Save and Close**.
2. If you wish to allow access to previously restricted folders, repeat the steps above, but click **Remove Folder Security**.

Note: Only portal administrators may add, remove, or edit users and restrict folder access.

HOW TO RESTRICT FOLDER ACCESS

- You may need to unblock pop-ups to view files CJBS has published to your portal
- The **FOR YOUR ACTION** folder has the government copy of your tax returns, and all your action items, including e-file forms that must be signed and returned to CJBS.
- The **FOR YOUR RECORDS** folder has a full copy of your tax returns and any information you may need to keep for reference.