



You will receive an invitation via email to register for CCH iFirm Portal. The Portal allows us to share documents and files in a secure and convenient environment with you, your bookkeeper, or others as authorized by you. In order to register, please follow the steps below:

Step 1

In the invitation email click on the words “click here” in order to start your registration process.

Dear Client,

We are constantly looking at ways to make it easier for you to share information with us.

The client portal service includes:

- Ability to view documents we wish to share with you.
- Ability to upload documents securely and share with us.

Please follow the steps below to register and use your Portal.

Step 1: Register for Portal

Click on this link to register: Please [click here](#) to register on the portal

Please note that this link expires after seven (7) days.

Step 2: Bookmark the link below

The above link will only work once. After registration, please use this link to access your portal: <https://trainingmw.cchifirm.ca/clientportal>

Step 2

Please use the email that you received the Portal setup request to and create a strong password, then click “Register”

Jones & Associates (Canada) - Portal English (Ca)

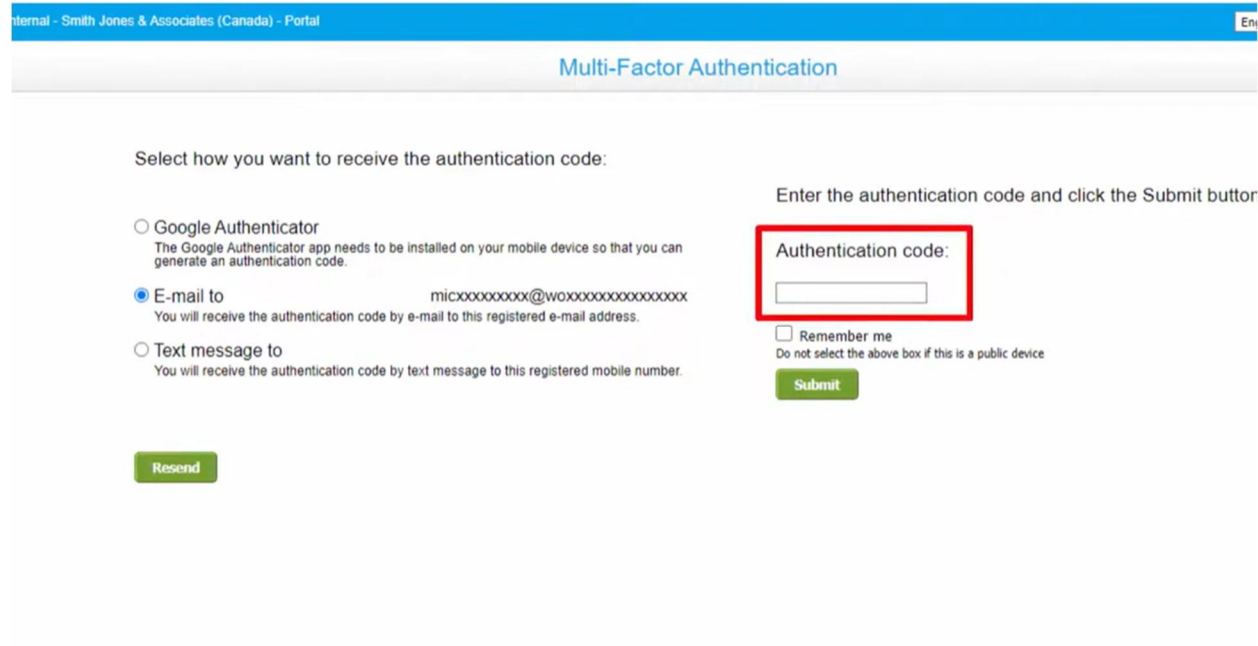
To complete your registration you must create a password.

E-mail Address

Create Password

Step 3

CCH iFirm uses Multi-Factor Authentication in order to protect your privacy and sensitive documents. Please choose the “email to” and click proceed. This will send you an authentication code to your email that you must enter in order to log in. Please enter the code and click “Submit.”



Step 4

Once you’re in the Portal, click “My details” on the left side of the page to review and edit your information accordingly.

Step 5

Use “My Documents” to upload documents to the folders. File names in **bold font** indicate they have not yet been viewed. You can click on the file name to download and view the document.

We are including a link to a video containing the above step-by-step instructions below:

https://youtu.be/Aom_NOsmCg

If you have any questions regarding the above, please do not hesitate to contact us at

reception@pacificcpa.ca.