

CCH[®] XCMworkflow[™]

Welcome to CCH XCMworkflow 2020-5.0

This bulletin provides important information about the 2020-5.0 release of CCH XCMworkflow. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

Coming Soon

Introducing CCH Access[™] Workflow

In January 2022, XCMworkflow will become CCH Access Workflow. More than just a name change, this update will merge XCMworkflow into the CCH Access platform, adding more integration and incorporating new and innovative features.

After the transition, you'll continue to use your XCMworkflow credentials. If you use any other CCH Access solutions, your firm's staff will sync with the CCH Access common staff database. You'll also benefit from the integration with the CCH Access platform, like easily linking your tasks to CCH Access Tax returns and linking files from CCH Access Document.

[Click here](#) to sign up to receive updates about the transition to CCH Access Workflow.

[Click here](#) to register for an Open Hours webinar in which a Workflow product expert will walk you through the latest developments and help you plan for a successful tax season.

Multi-Factor Authentication

Multi-factor Authentication (MFA) will be required for all firms with the 2021-2.1 release scheduled for January 2022.

Upon login, staff members will be prompted to enter a passcode that is delivered to the email address in their user profiles. They must enter the passcode before they can complete the login process. The ability to receive passcodes via phone numbers will be available in the January 2022 release as well. In a later release, the ability to receive passcodes via e-mail will be removed and replaced with phone numbers per IRS guidelines. In preparation for this change, please ensure that all user profiles include the users' phone numbers.

Also in the January 2022 release, users will receive a prompt at login allowing them to enter and validate their phone number. This validation will prepare users for receiving the passcode via phone number instead of email in a subsequent release. [Click here](#) for more information on MFA.

Discontinued Support of Internet Explorer[®]

As your software partner, we strive to provide you with the highest security possible when accessing our products and websites. We can only do that by supporting the most recent versions provided through our supported environment vendors.

At Wolters Kluwer, we have adopted the policy of working within the latest two versions currently released in the market for these supported environments. While we may not always be aligned with this policy due to release timing, our goal is to either follow the vendor lifecycle policy or support the last two vendor versions and discontinue support for anything older.

There is a misconception about the discontinued support of Internet Explorer[®] 11 by Microsoft[®]. Microsoft[®] announced that it is discontinuing support of Internet Explorer[®] 11 for Microsoft[®] Teams and Microsoft[®] Office 365. [Click here](#) for more information on this announcement. Depending on your [current supported operating system version](#), Microsoft[®] will continue to support Internet Explorer[®] 11.

As communicated on October 28, 2020, and April 27, 2021, CCH will discontinue support of Microsoft® Internet Explorer® 11 in our software products as of November 30, 2021. We are providing advance notice of this change to give your firm ample time to react should there be a need based on office practices or processes.

New in this Release

Terms of Use

Staff members at firms that use Single Sign-On (SSO) will now be prompted to accept the Terms of Use when they initially login. You must accept the Terms of Use before you can access XCM. This is a one-time acceptance; once you have accepted, you will not have access to the Terms of Use again. [Click here](#) for more information on the Terms of Use.

Filtering on the Schedule by Employee Report

The Schedule by Employee Report now has improved filtering functionality.

Issues Resolved

Due Date Summary Report

An issue with the Due Date Summary with Deliverable Count report has been resolved.

Filtering Task Types with Apostrophes

Task types containing apostrophes can now be filtered upon successfully in My View.

Ordering of Custom Fields in the Detailed Report

Custom fields are now ordered consistently in the Detailed Report.