

Tax & Accounting

Take Advantage of Our Digital Self-Service and Support Resources



Wolters Kluwer is committed to delivering customer service at the highest level and we have worked diligently to improve our support resources, making it easier to manage your account.

My Account Handles Many of Your Support Needs

With My Account — the customer self-service portal you access via **Support.CCH.com** — you can:

- View your tax software renewal notice
- View your invoices and billing statements
- Make a payment via credit card or ACH
- Update your address and contact info
- View your inventory
- Check and track your book orders
- Review your publication standing orders
- And more

Steps to Access My Account

Here are some important things to keep in mind:

- To log into My Account, you'll need your account number, which you can find in the top left corner of your invoice. Please note that it should be a 10-digit number. See page 2 for an example.
- For more information on My Account, including FAQs and helpful tips, visit **Support.CCH.com** and search for article **RP367**.

You'll also benefit from:



- **Advanced Virtual Agent (AVA)** — Our Virtual Agent can process your payments and provide you with an invoice copy.
- **Intelligent Digital Agents (IDA) Chat** — Artificial intelligence powered bots provide additional support during our busiest call times to help you get answers to common tax-focused questions.
- **Intelligent Digital Agents (IDA) Voice** — We continue to enhance our IVR (interactive voice response) system capabilities that provide interactive help to customers with common call-driver questions such as e-file rejections, application status, and intelligent escalations.
- **Improved Coverage** — Cross-trained teams combined with a new enhanced phone system enables dynamic call routing between offices to meet peak demands.

In addition, we've added nearly 300 seasonal resources to improve service levels on the phones and via live chat.

- **Customer Support Community** — This enables users to post questions and comments related to products, support, and the latest industry developments in an online forum. The Community encourages peer-to-peer collaboration and gamifies interaction with points and a leaderboard. The Community also helps build searchable content and provides us with valuable insights into the user experience.
- **Knowledge Base and Intelligent Search Tool** — Our dynamic, online Knowledge Base environment contains relevant product articles and videos, readily available 24/7 to customers and colleagues. Our improved search tool can bring disparate data sources together and uses machine learning for improved relevancy. For example, the search engine tracks what results are clicked on the most and automatically tunes relevancy based on your activity.

For more information, visit **Support.CCH.com** and click on My Account, or choose "Contact Us" to chat with our Advanced Virtual Agent.

We've Simplified Our Billing Statements

We've updated our invoices to make it easier for you to understand your bill and have refreshed the remittance section so you can quickly see the amount due, date due, and Federal ID Number.

Invoice

Invoice Date 01/01/2021
 Invoice Number 555555555
 Account Number 999999999
 Terms Net 30
 Installment 1 of 12
 Due Date 10/24/2021

If you utilize a payment plan, then you'll see pertinent information relative to your installments next to the Due Date, making it easier to find.



CONTRACT TOTAL	\$ 1,944.00
AMOUNT DUE	\$ 162.00

Questions on your invoice? Go to <https://support.cch.com>.

Bill To:

John Smith CPA
 1234 One Way Street
 Anytown, USA 00000

Ship To:

John Smith CPA
 1234 One Way Street
 Anytown, USA 00000

We've added the Invoice Total and Amount Due to each page where it's quick and easy to see.

MATERIAL ID/ DESCRIPTION	QTY/ USER	LIST PRICE	ADJUSTMENT	NET PRICE	SALES TAX	LINE TOTAL
Subscription Period from 01/01/2021 - 12/31/2021						
10053802 KNOWLEDGE TOOLS COMMERCIAL 1-5 USERS	4	25.00		100.00	8.00	108.00
10053790 KNOWLEDGE TOOLS HUD FMLY HOUSE 1-5 USRS	2	25.00		50.00	4.00	54.00
SUBTOTAL				\$ 150.00	\$ 12.00	\$ 162.00
PO Number: STEPOPS-14758				Delivery/Download Charge		
Order ID: 41102963				Sales Tax on Delivery/Download charge		
To see previous billings, go to https://support.cch.com/myaccount/ , select Invoice Tab, and enter the order number.				Invoice Total		\$ 162.00
				Payment Received with Order		
				Invoice Balance Due		\$ 162.00

We've added information regarding the My Account customer self service portal where you can view previous billings.

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EFT and ACH are preferred payment methods

See reverse side for other ways to pay

Bank Name: BMO HARRIS BANK N.A.
 Account Name: CCH INCORPORATED

Address: CHICAGO, IL
 Account Number: 225-275-7
 ACH Routing Number: 071000288
 Swift Code: HATRUS44

Federal ID Number: 13-3504158

Include invoice number with transaction remittance advice to: cch-ar@wolterskluwer.com

We've added our Federal ID # to complete the ACH information on the payment section/coupon. All ACH information is now in one easy to find location next to Amount Due.

CONTRACT TOTAL	\$ 1,944.00
Account Number	999999999
Invoice Number	555555555
Invoice Print Date	01/01/2021
AMOUNT DUE	\$ 162.00
Payment Amount	

8130000162003

CCH Incorporated