Tax & Accounting

Professional and Client Services

CCH Axcess™

Implementation Overview

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Implementation Overview

The purpose of this document is to provide a high-level overview of the implementation process for CCH Axcess™. Before the start of your implementation, you will be sent a link to complete a short survey about your software environment so the Professional Services team can be familiar with your product mix and desired outcomes.

Implementation Consultant Assigned

The Implementation Consultant will assist in preparing your environment, installing CCH Axcess™, migrating your data, and guiding your firm on required management and maintenance of the software. Your Implementation Consultant will be your primary contact throughout the entire implementation process, giving you a single point of contact for any questions and support needs that arise.

Preparation

Initial call

The Initial Call will take place with your Implementation Consultant. They will work with your office on:

- Reviewing the implementation strategy and project timeline.
- Environmental settings such as system requirements, network configuration, firewall and anti-virus settings, and bandwidth testing.
- Setting expectations for Installation & Configuration.
- Setting expectations for Data Validation.
- Additional topics such as client import, staff import, mergers and acquisitions, firm splits, data validation, conversions, and migrations.

To prepare for the Initial Contact Call please review the CCH Axcess™ System Requirements:
https://support.cch.com/productsupport/productSupport.aspx?id=37#SystemRequirements

Installation

Installation and Configuration eLearning is available for your convenience. You will watch these training courses prior to your scheduled implementation. CPELink user registration is provided by the Professional Services Scheduling team.

Your Implementation Consultant will be available to answer installation or configuration questions and walk you through logging into your CCH Axcess™ account for the first time.

After the program is installed, your Implementation Consultant will assist with obtaining product data for the data validation phase.

Configuration

Once the CCH Axcess™ installation is complete, your Implementation Consultant will be available to help answer questions about configuring the software.

- High-level firm configuration
- Client creation and updates
- Staff creation and updates
- Security, which will include permissions, access groups, and product licensing

Data Validation

Your Implementation Consultant will assist you in preparing your data for the migration or conversion to CCH Axcess™. This analysis may result in the need for cleanup before the data is moved into CCH Axcess™.

- Data Validation Delivery – An initial validation call to review:
  - Duplicate or invalid Client and Staff Data
  - Client type and format of client and staff email addresses
  - Product-specific errors and decision points
- Data Validation Approval Form is presented for review and signature
  - Details the number of clients and staff, matching criteria, matching results, critical errors, and any custom work your firm may have requested.
  - Specifies items that must be cleaned up prior to the scheduled migration.
- Data Validation Review - A second validation call will be held to ensure there are no questions, that cleanup has begun or is complete, and to determine if any additional action is necessary.

Client and Staff Import

If your office is not migrating data from a CCH ProSystem *fx*® product, your Implementation Consultant will import your clients and staff into the CCH Axcess™ through spreadsheets.

- Client and staff import templates and instructions are provided by your Implementation Consultant.
- Existing client and staff data can be updated and expanded if needed.

Migration

Migration is the copying of data between CCH® ProSystem *fx*® products to CCH Axcess™ using a migration utility. The migration is performed by your Implementation Consultant once the integrity of your data has been validated.

Tax Migration

- Migration of returns from selected years. Current tax year plus seven prior tax years are available for migration.
- The old and new tax programs will be unavailable during the migration.

Practice Migration

- 2 years of historical data plus the current year will be migrated.
- All open WIP and Accounts Receivable items will migrate, regardless of the transaction date
- Migration could span 2 business days. The old and new practice programs will be unavailable during the migration.
- You will be able to retain a backup of your old practice database for historical reference.

Document Platform Migration

Document Platform Migrations from CCH® ProSystem *fx*® Document On-Premise require additional services. Your Implementation Consultant will confirm all necessary CCH Axcess™ setup has been completed prior to the migration.

Practice and Document Third-Party Conversions

Conversions to CCH Axcess™ Practice or CCH Axcess™ Document from third-party applications require additional services. Your Implementation Consultant will confirm all necessary CCH Axcess™ setup has been completed prior to the conversion.

Tax Third-Party Conversions

All tax conversions will be handled by our Tax Conversions team. Conversion guides and documents are located on the Conversions website at https://conversions.cch.com. The Tax Conversions team can be contacted via phone at 1-800-739-9998 or via email at conversions@wolterskluwer.com.

Readiness Phase

Your Implementation Consultant will remain available to you for the first 30 days. Once the Readiness Phase is complete, your Implementation Consultant will perform a support handoff to the CCH Customer Support team.