CCH Axcess™ AutoCheck
August 2020

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Welcome to CCH Axcess™ AutoCheck

This bulletin provides important information about the August 2020 release of AutoCheck. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

Overview of Features

CCH Axcess™ AutoCheck is a cloud-based disclosure checklist that tailors the disclosures required to present financial statements in accordance with the frameworks listed below. CCH Axcess™ AutoCheck leverages the power of the cloud to increase efficiency and collaboration among team members. Key features include:

- Leverages the common elements of the CCH Axcess platform, such as single sign on for all applications and common databases for staff and client information
- Team collaboration with multi-users
- Access to checklists at any time and from anywhere
- Tailoring questions to customize the checklist to the entity
- Review note functionality
- True cloud-based solution.

The automated checklists provide the disclosures required to present financial statements in accordance with accounting principles as promulgated by the FASB or IFRS Foundation, as applicable. The checklists allow preparers of financial statements to customize the disclosures to those required for a specific entity. The following checklists are included with this release:

- GAAP Annual Disclosures Checklist (June 2020 Update)
- GAAP Interim Disclosures Update (June 2020 Update)
- CCH IFRS and FRS101 Checklist (December 2019)

Roll forward functionality will be available when GAAP Interim Disclosures Update (September 2020 Update) is released in October.

Literature Update

The CCH Axcess™ AutoCheck U.S. GAAP Disclosures Checklist and CCH Axcess™ AutoCheck U.S. GAAP Interim Disclosures Checklist have been updated for the disclosure and presentation requirements in effect as of June 30, 2020. These checklists include changes made by the FASB to the FASB Accounting Standards Codification™ (Codification) through Accounting Standards Update (ASU) No. 2020-05, Revenue from Contracts with Customers (Topic 606) and Leases (Topic 842): Effective Dates for Certain Entities.

The CCH Axcess™ AutoCheck IFRS Disclosures Checklist has been updated for disclosure and key presentation requirements through December 31, 2019.

Updated Terms of Use

All CCH Axcess users must accept modified terms of use the first time they log in after the deployment of release 2019-4.1. These terms may be accepted during login to any one of the following:

- CCH Axcess products that are installed on your computer
- Most web sites that include cchaxcess.com in the address, such as autocheck.cchaxcess.com, collaboration.cchaxcess.com, financialprep.cchaxcess.com, and knowledgecoach.cchaxcess.com
- Third-party applications using Open Integration Platform Token Authentication

CCH Axcess users who attempt to log in to some third-party applications using Oauth 2.0 Preview APIs will receive an error message until terms are accepted using one of the login methods described above.

User Phone Number Prompt During Login

To prepare for IRS mandates regarding 2-step verification, a phone number is now required for all users if your firm uses the CCH Axcess login method. This change does not affect firms using Active Directory or Federation Services to log in.

After a user enters their password and completes 2-step verification, if the phone numbers on the staff profile are empty, CCH Axcess prompts the user to enter a direct phone number. The user must verify the phone number by either:

- Entering a code sent by SMS text message
- Pressing # after answering an automated call

After verification, the new phone number is saved to the business phone on the staff profile.

Note: This feature allows users to enter and verify a phone number in their own staff profile, even if they don't have permission to edit staff profiles. The behavior and permissions for managing phone numbers in Staff Manager and Open Integration Platform are unchanged.

Secure Connections During Active Directory Sync

As previously announced, this release updates the connection used for Active Directory sync from standard to secure. If your domain supports a secure connection, then no action is required. If necessary, you may downgrade to a standard connection. This change does not apply if your firm uses the CCH Axcess login method or a custom staff synchronization solution.

Replace Federation Services Secondary Certificate

If your firm is using the Federation Services login method it is important to have a secondary token signing certificate to ensure uninterrupted use of CCH Axcess when the primary certificate expires. Previously, you were required to repeat pilot mode, metadata upload, and other steps. Now, you may add or replace the secondary certificate without these other steps.

Client Access Group Limit

CCH Axcess allows up to 1,000 client access groups per account. If more than 1,000 groups exist, the software will not allow new groups until the number of groups is reduced below the limit.

Known Issues

Return Group Can Be Changed Using Client APIs

Previously, return group was not used when included in Open Integration Platform client APIs used to add or modify clients. Now, the return group is saved when a client is created or modified.

Getting Started

Prerequisites

- CCH Axcess™ Install and update Manager must be installed. For help with the installation, please review the knowledge base article How do I install CCH Axcess Install and Update Manager?

- Use the CCH Axcess™ Install and Update Manager to install the CCH Axcess Dashboard. For help with the installation, please review the knowledge base article How do I install, repair, uninstall or download CCH Axcess™ products?

- Users must be created in CCH Axcess™ prior to logging in. For help with creating users, please review the knowledge base article How do I add or create new staff users in CCH Axcess?

- A client must be set up in CCH Axcess before staff members can create engagements for the client. For help creating clients in CCH Axcess, please review the knowledge base article How do I create a new client in CCH Axcess?

Once users are created, they can log in by doing the following:

1. In a recommended web browser (listed below), go to https://AutoCheck.cchaxcess.com.

2. Log in with your CCH Axcess™ credentials.

   Note: Your organization can use AutoCheck with Passive ADFS. For information on the use of ADFS with CCH Axcess, please review the knowledge base article Introduction to Federation Services Authentication (ADFS) in CCH Axcess or CCH ProSystem *fx* Document.

3. Click **New Client** to create a client and complete the required disclosure checklist. For help with creating clients and completing the checklist, please review the knowledge base article How do I create clients, add disclosure checklists, and complete the checklist using CCH Axcess AutoCheck?

Browsers Supported with this Release

- Microsoft® Edge® (Internet Explorer® is no longer supported)

- Google® Chrome™ (Recommended)

- Firefox®