Wolters Kluwer

Release Notes

Release 1.5
September 2020

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 1.5

This bulletin provides important information about the 1.5 release of Client Collaboration. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release - Firm User Updates

Invite Spouse to Client Collaboration
When creating requests for married clients the taxpayer and their spouse are both invited to use Client Collaboration. Each user receives their own invitation to create a user account and set up credentials. Both users can access all of the tax return information for that client that is available in Client Collaboration.

Note: In an upcoming release later this year, both the taxpayer and the spouse will be able to sign engagement letters and Form 8879 electronically through their own user accounts.

Client Registered Successfully Indicator
A new column on the Requests dashboard indicates whether the client users have completed the self-registration process and created their user IDs and passwords. For married clients, you can view the registration status for both the taxpayer and the spouse, making it easy to tell if one user or the other has registered or if both users have registered.

Note: For requests created and sent prior to this release, the Registration indicator will not show successful logins for the taxpayer and spouse separately because, as this is the first release where the spouse can be invited.

Custom Questionnaire Questions and Templates
In the Library, you can now create custom questions and custom question templates. You can then select a template to include with the default organizer questions. The questionnaire was designed to reduce the number of questions clients must answer; however, some states or situations may require a specific set of additional questions that are not included in the default tax organizer.

The firm can configure a library of custom questions, and then combine those questions into custom question templates. These templates can be named for easier reference and can later be edited or deleted. In addition to headers, there are three types of custom questions: Yes/No, $ Amount, and Text. For Yes/No questions, the firm can also elect to add a related custom document request to the document request list.

Add Custom Items to the Document Request List
The document request list is based on prior year tax return data, in addition to client answers to the questionnaire. You can also add custom document requests to the client's request list. This feature is helpful when some information is needed only from certain clients. For example, clients in one state may be required to provide a copy of their state-issued identification, while clients in a neighboring state might not have that requirement.

In the Library, you can now create custom document request list templates consisting of up to 30 custom requested items. A special system-provided template called New for Blank Organizer is presented to clients who do not have a prior year tax return in CCH Axcess™ Tax. This special template prompts users for the most requested items for new clients.

Blank Organizers for New Clients
You can now create and send a blank organizer to clients who do not have a prior year tax return in CCH Axcess Tax. Since no prior year data is available for these clients, a customized document request list collects required information, such as a copy of their prior year tax return, W2s, income and expense data, and more. When creating requests, the system automatically applies the New for Blank Organizer template for clients without a prior year return; however, you can also create your own templates to send for blank organizers as well.

Batch Request Creation - Select All, Select None, Select Multiple
When sending requests in a batch, you now can select specific clients to send the request to. New options allow you to Select All/Clear All clients across all pages or only across the current page. You can also select one or more clients in the list, and only those selected clients will receive a request. These changes make it easier for you to identify and select clients to use Client Collaboration.

Navigation Updates
The 9-square menu button now includes a new Setup section and a Client Collaboration section. Under the Setup section, a new Administration link allows firm administrators to set up and configure the system. Branding and Payments configuration options can be found under Administration.

The Library option, now under the Setup section, includes four sub-options: Engagement Letters, Questionnaires, Document Request List, and Tags. Requests have been moved to be under the Client Collaboration section. Payments and Tags will be available in a future release.

New in this Release - Client User Updates

Forgot User ID
A client can now request that their user ID be sent to the email address associated with that user. The client must complete two-factor authentication after requesting a forgotten user ID.

Spouse Login to Client Collaboration
Requests for married clients now include invitations for both the taxpayer and their spouse to use Client Collaboration. Each user receives a separate invitation to create a user account and set up their credentials. After setting up a user account, the spouse can log in to sign engagement letters, upload or download files, and sign the Form 8879.

Custom Questions
The firm can now send custom questionnaires to clients in addition to the default questionnaire. After responding to the Personal Information questions, clients see a new Additional Questions tile that includes any custom questions sent by the firm. Clients can answer these questions like other questions in the organizer. These questions and answers are included in the organizer PDF. Some custom Yes/No questions can result in additional requested items being added to the client's document request list.

Custom Document Request List Items
The firm can now include custom document request list templates in their requests. The items on the custom list are added to the default document request list, so the client only has a single list to work from. For clients without a prior-year tax return, you can send the special blank organizer template or use your own organizer.

Resolved Issues

The following issue has been resolved with this release.

Up to 72-hour Delay to Sync New Returns
You can now create requests for clients with newly created or updated prior-year tax returns without needing to wait up to 72 hours for the returns to synchronize with Client Collaboration. Additionally, since prior year returns are no longer a requirement (you can create blank organizers as noted above), any changes made to a tax return are available immediately.