Wolters Kluwer

Release Notes

Release 3.0
December 2021

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 3.0

This bulletin provides important information about the 3.0 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

License Used When Client Logs In
The point at which a Client Collaboration license is considered used, and deducted from the total licenses purchased, has changed with this release. Licenses are no longer considered "used" at the time the Request is sent. It is now considered "used" and deducted from the firm's license count when the first client user of each request logs into their Client Collaboration hub. This change ensures that you are not charged for Client Collaboration requests when the client never logs in.

Global Client Search
A global client search can now be performed from the Client Collaboration Requests dashboard. A minimum of three (3) characters of the client sort name or client ID is required to initiate the search. The resulting list will display matches as well as the status of the request. Once an item is selected, preform all the respective actions normally available from that status.

Refresh eSign Credentials
When the primary administrator of the eSign account changes, the eSign credentials need to be refreshed in Client Collaboration to retrieve the new credentials used for sending engagement letters. In the Client Collaboration Administration panel, navigate to Firm Information and refresh the eSign credentials as needed.

View or Download Engagement Letter PDF
Engagement letter templates and custom client engagement letters can now be viewed in PDF format so you can preview the letter before sending to your clients. Choose View as PDF to open a new browser tab or choose Download to PDF to download a copy to your computer. Template previews and PDFs will display the **keywords** that will be replaced with client data when the letter is sent. When viewing specific client letters, the PDF will be an exact representation of the engagement letter the client will receive.

New Files in Document Locker
A tile has been added to the Request dashboard to inform users which clients have new files in their Document Locker. The tile represents clients who have had new files added in the Document Locker over the last seven (7) days. A file icon has also been added to the client record with a badge count of the new files added over the last (7) days. Clicking on the file icon will take the user to the client's Document Locker. **Note:** The file count will include files uploaded by both the client and the firm.

New in this Release - Taxpayer/Client Updates

Redirect after Registration
After successfully registering a user ID and password, client users will be redirected to the login page specific for your firm.

Request Title and Switch Requests
After successfully logging in, the open request will appear next to the client's profile. If a client has more than one request, he/she can switch between the open request to interact with each one separately.

Updated Questionnaire for 2021 Tax Law Changes
The default questions in the Questionnaire have been updated to reflect all tax law changes and amounts.

Enhanced Client User Experience
Tutorials, walk-throughs, and tips have been added throughout the collaboration hub to improve and simplify the client onboarding process. Clients will receive in-application guidance while performing their tasks within Client Collaboration. This should reduce the amount of time firms spend supporting clients using Client Collaboration.

Enable Client to Navigate to Document Request List (No Missing Documents)
After the client sends the documents to the account, the next step on the task list is to prepare their return. When there are items not marked as complete on the Document Request List, a Missing Documents button is available for the client to continue to add more documents and complete all items on the request list. However, previously if the request list was 100% complete, they could not navigate back to the request list. With this feature, clients will be able to navigate back to the Document Request List to add files even when it is 100% complete. The firm will be notified of any new files uploaded through the **Missing Documents Received** tile on the Request Overview dashboard.

Schedule F - Farm Sub-Organizer
Schedule F - Farm has been added to the client's list of available tiles in the organizer. Like Schedule C & E, the client will see prior year information for all income and expense items, and they can either add data to each line, or choose to upload a summary schedule on their Document Request List to provide activity information.

Always Print Taxable Events
The Taxable Events page is now included with the printed organizer PDF produced by Client Collaboration. This page is the high-level summary where the client identifies which taxable events took place during the year for the additional questions to appear for each event.

Message When Navigating to Document Locker
When your client navigates to the Document Locker, a message is shown explaining that tax documents should be uploaded to the Document Request List rather than to the Document Locker. Your client can choose to return to the Document Request List or stay in the Document Locker. Previously, this message would only display when the task list was in an open state. Now, the message time has been extended and will display until the Request is finalized (after the tax return is delivered).

Fixed in this Release

Library Paragraph Paste
When copying and pasting data into a library paragraph, special characters will no longer print as question marks. The character pasted will be the character that is printed on the engagement letter.

Client Users Can Use the Same Email Address
It's now possible to end more than one request to the same email address. When sending more than one request, the client can use the same login and access all requests through the switcher icon.

Request Dashboard
Resizing the browser or changing the zoom level will no longer impact the readability of the Request dashboard counts and status labels.