

CCH Access™ Client Collaboration

Welcome to CCH Access Client Collaboration Release 2.4

This bulletin provides important information about the 2.4 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

FIRM ADMINISTRATION UPDATES

None in this release.

FIRM REQUESTS DASHBOARD

None in this release.

New in this Release - Taxpayer/Client Updates

Back to My Tasks

From the Questionnaire or Document Request List, your clients have a new top navigation link to return to the Task List.

Hide Tasks that are Not Requested

Your clients' task list now shows only tasks that have been included during the request creation. For instance, if an engagement letter is not created, then the first task, "Sign Engagement Letter," will be hidden, and the next step, "Complete Organizer," will be the first task your client sees.

Prompt Client to Update Expired State-Issued ID Information

In the Personal Information section of the questionnaire, a notification will remind the taxpayer and/or spouse when their state-issued ID has expired so that it can be updated.

Sorting on Tax Payments Grids

Tax payments entered on State and City grids are now sorted by jurisdiction first, then by payment date, for better grouping and to make reviewing entries easier. Federal payments are now sorted in date order.

Common Updates

ADSync Tool

If your firm uses the CCH Login (username/password) mode of authentication, the following information is not applicable.

If your firm uses Federated Services with the ADSync Tool, you can now create the OAuth token using a new feature in Dashboard. This new option is only applicable to firms using our Passive with IDaaS mode of authentication.

To access the feature, do the following in Dashboard:

1. Click **Application Links**.
2. Click **Utilities** under Firm.
3. Click **Common on the navigation pane**.
4. Click **ADSync Authentication Token**.

Any firm using older modes of Active Directory Integration or ADFS Active mode should continue to use the existing method for AD synchronization.

Firms using the Passive without IDaaS mode of authentication should use the older ADSync Tool or move to Passive with IDaaS to use the newer ADSync Tool.

Please contact our Wolters Kluwer support team if your firm needs to move from Passive without IDaaS to Passive with IDaaS mode of authentication. Click [here](#) for more detail on when and how to use this new OAuth Token for the AD Sync Tool when CCH Access is configured for Passive with IDaaS mode of authentication.

Fixed in this Release - Taxpayer Updates

Firm Dashboard Statuses

All firm dashboard statuses now report properly.