Wolters Kluwer

Release Notes

Release 3.6
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CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 3.6

This bulletin provides important information about the 3.6 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

Business Requests:

Invite your Business Clients to start collaborating with your firm using Client Collaboration
We are excited to announce Client Collaboration now supports business client return workflow requests!

With this release, you will be able to create **Business Client Users**, send **Invitation Requests** and **Engagement Letters** in batch to your business clients using Client Collaboration.

Business Client Types:

- Corporation (1120 and 1120-S)
- Employee Plan (5500)
- Fiduciary (1041)
- Non-Profit (990)
- Partnership (1065)

Send Invitation Requests with Document Locker
You can now invite your business clients to start collaborating and sharing files immediately using Document Locker in Client Collaboration. You no longer have to wait until tax season to start collaborating with your clients using Client Collaboration.

Invitations provide your firm the convenience of inviting your business clients to their Hub now to kick-off the collaboration process. Invitation requests do not include a tax organizer and can optionally include a personalized engagement letter. When ready, you can send your engagement letters now, or later.

- Invitations with Document Locker are sent automatically when the business client requests are created
- No additional request selection or template setup is required when sending Invitations with Document Locker only
- Your clients receive a registration email with detailed instructions and links to helpful videos
- You and your clients have immediate access to your clients' Document Locker (year-round storage)

Invitation Requests can be sent to in batch to your business clients.

Send Business Engagement Letters
Firms can now send a personalized engagement letter to their business return clients. The firm must specify required signatories who will receive an email notification and can review and electronically sign the engagement letter. Client users designated as Non-Signers will not see the engagement letter in their task list.

Library Updates
The library has been updated to support business returns. You can now create templates for engagement letters, questionnaires, and document request lists for each of the supported client types.

Requests Dashboard
From your firm dashboard, the **Client Type** drop-down has been updated with the new business Client Types. As you and your client progress through the business request workflow steps, the status of your client's requests will automatically update in the dashboard.

- Client Search — You can search for a client across all statuses for the selected client type from your firm dashboard
- Additional functionality extended to the business return requests:
    - Resend invitation
    - Close/Reopen requests
    - Download tax documents
    - View files in Document Locker

Import Business Client Users
User Management for business entities has been added to Client Collaboration. With the new User Management feature, you can import your business clients via a **Client User Import Template** prior to sending your business workflow requests.

The Client User Import Template allows you to gather all your clients' details required for sending Requests through Client Collaboration:

- Up to 20 business client users can be linked to each business request
- You must designate which user will be the Primary Signer for the engagement letter. You can also designate a secondary signer

The Client User Import Template can be found in Administration > Client Collaboration > Client Users. From this screen, simply download the template, add required details, then upload the completed template.

Note: The client users uploaded in the template are not invited to Client Collaboration at this step. These users will be invited when the business request is sent.

Managing Client Users
When sending business requests in batch, a People icon will display next to the client request with a badge indicating the number of client users that are currently linked to the request.

Clicking the People icon will display a Client Users screen where you can see a list of the client users currently linked to the request along with their registration status, plus you will have additional options to modify the client user details prior to sending the request. From this screen, you can:

- Add a new client user
- Link or unlink a client user
- Unlinking a client user from a request removes this user's access to the request on their next login
- Edit client name, email, title, and signer designation

New in this Release - Client User Updates

Invitation Requests with Document Locker
Clients can receive an invitation request with access to their Document Locker to begin collaborating with the firm immediately on their business return. The invitation request may or may not include the engagement letter. Tax organizers are not yet available for business returns but will be available before the tax season begins. Clients can easily switch between requests using the Request Switcher feature.

Electronically Sign the Business Engagement Letter
Clients can now receive an engagement letter from their firm related to their business return. Specified signers will be able to review and electronically sign the engagement letter. When all required signatures are received, this step in your client's task list be marked as completed.

Invitation Email - Registration Period Extended to 90 days
When creating and sending requests to clients, their registration link will now be valid for 90 days. Previously, the link was valid for 30 days.

Invitation Email - Links to Instructional Videos
The content in the invitation email has been updated with links to instructional videos for registering and logging into Client Collaboration.

Introductory Request Email Invitations
When the firm creates a new business request for the client, the client will receive an email invitation. If the client has never registered for a Client Collaboration account, then their email will instruct them to do so. If the client is a repeat client, such as a 1040 client who has already used Client Collaboration, then their email will instruct them to login using their existing Client Collaboration credentials.

Disallow Email Address as User Id
Clients are no longer allowed to use their email address as their User ID when registering their account. Existing clients may continue to use their email address as their User ID, or they can change it to something else.

Close/Reopen Business Return Request
Clients can now close their business return request or can request the firm to reopen a closed business return request.

What's coming next for Business Requests

Client Collaboration is releasing the business client return workflow requests in phases. We're excited to be providing you with all the features described above with the 3.6 release, but we still have more planned to come in future releases:

- Business organizers with questionnaire and document request list
- Business tax return delivery
- 2-Way Messaging for business clients
- Sending Invoices to business clients
- Ability to Create Single requests for business clients
- Manage your business client users from your dashboard after the request is sent