Wolters Kluwer

Release Notes

Release 3.7
November 2022

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 3.7

This bulletin provides important information about the 3.7 release of Client Collaboration. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

Important: In preparation for the 4.0 release on December 13, 2022, please be sure to finalize all requests and download each client's tax documents. Neither you nor Wolters Kluwer will be able to retrieve them after the 4.0 release.

New in this Release - Firm Updates

Business Entity Return Workflow
With this release, **business tax organizers** have been added to the business entity workflow requests in Client Collaboration. Your firm can now send digital business tax organizers with **questionnaires** and **document request lists** to business clients. Your business clients will be able to electronically sign their engagement letter, answer questions electronically, upload requested files and review and sign their business tax return.

Client Collaboration supports the following entity types: Individual, C-Corporation, S-Corporation, Partnership, Fiduciary, Employee Plan, and Non-Profit.

Send Business Tax Organizers with Questionnaires and Document Request Lists in Batch
Send digital business tax organizers in batch to your business clients through Client Collaboration. Business tax organizers include a default questionnaire and personalized document request list, based on answers to questions in the questionnaire. The firm can also include additional custom questions and document requests list items for each supported client entity type.

The business questionnaire sent to clients includes Yes/No questions and description fields with the option to attach supporting documentation in the document request list.

The business document request list allows your business clients to upload files where no specific line item is provided, upload files to a requested line item, or apply a status to a requested line item if no documents are applicable. The available line-item statuses are: reply with amount, attached above/below, previously sent, none this year, no longer applicable, and firm has on file.

Edit Client Request Settings and Client Users
You can now edit business return request settings including Client User Management from the Error and Retry screens so that you can modify specific client settings and resolve any errors before creating and sending requests to your clients.

Track Business Clients' Progress
Track the progress of your clients' request for all supported client types from your firm's Overview Dashboard or Requests Dashboard. Use the Client Type drop-down to view requests for different entities.

Download Business Tax Documents
You can download all your business clients' tax documents from the actions menu. Client Collaboration will generate a zip file containing the signed engagement letter, questionnaire with any answers (PDF) and any files uploaded to the document request list. We recommend downloading tax documents after the client has indicated they have completed the organizer, but you can download them at any time.

Missing Documents
Your clients will have an option to upload additional documents to their document request list, even after the organizer has been completed. Your firm can easily identify and download any new documents added by clients from the Missing Documents Received pane on the Firm Overview Dashboard.

Tax Return Center
The Tax Return Center is a new feature and available for business tax requests. Use the Tax Return center to deliver the final business tax return to your clients. The Tax Return Center is available from the actions menu for a business client. You can upload one or more files and indicate which files need to be signed by the client. The Tax Return Center will track the unsigned and signed copies of the business tax return. At this time, the IRS has not permanently allowed for the use of electronic signatures on business returns, so we are providing for a wet ink signature instead. The unsigned and signed copies will also be available in your client's document locker with tags for easy reference.

Batch Request Creation – Select All Default Value
In the batch request creation process, on the Review and Send step, the Select All default value has been changed from Yes to No to prevent unintentionally sending to all clients. You can still switch to select all clients across pages or only on the current page.

Business Engagement Letter Signer Changes
You can change the primary or secondary signer for a business client by selecting the people icon in batch request creation. If signers change before the engagement letter is signed by all required parties, then a new engagement letter will be processed and sent to the newly designated signers, replacing the original engagement letter. If the current tax year engagement letter was signed before the change, then the change will not apply until the next year, or a new request is requested.

New in this Release - Client Updates

Business Entity Return Workflow
With this release, the end-to-end workflow for business tax returns is now available. Your business clients will be able to review and electronically sign their engagement letter, answer questions electronically, upload requested files and review and sign their business tax return. Clients with multiple returns can easily switch between requests using the Switcher icon in the upper-right corner of the screen.

Business Tax Organizer Questionnaire
The questionnaire sent with the business organizer includes three default tiles and one optional tile if the firm sends additional questions. The three default tiles include: Business Information, Assets and Tax Payments. The Business Information category includes three pages: About, Electronic Funds and Events. The Events page includes 21 questions organized in categories such as General/Owner Operations, Investments, and Debt. Answering Yes to these questions in most cases adds a new item to the clients Document Request List, reminding them to upload related documentation. A few questions also may prompt for additional information.

Business Document Request List
Each business tax organizer will include a document request list where clients can upload files related to their business return. The Document Request List is dynamically built, based on the client answers to the Events questions in the questionnaire. Additional items can show up based on any additional template the firm chooses to send to the client during request creation. A copy of the Document Request List will print with the PDF/printed copy of the organizer.

Business Organizer Notes
A notes section is available the business organizer so that the client can share additional information as they complete their organizer. These notes will display in the PDF/printed copy of the organizer.

Send to Accountant
The Send to Accountant option in the client's Task List allows the client to notify the firm when they have completed the organizer The client will be unable to make changes to the questionnaire but can continue adding files to the Document Request List. The client request will automatically move to the next step in the firm dashboard and will be available from the Return Ready to Start status.

Track Workflow Status
Clients can easily track the progress of the business tax return workflow from the Task List.

Review & Sign the Business Tax Return

When the firm uploads the return to the Tax Return Center, the assigned signer will receive an email notification that the business tax return is now available for them to review and sign. If a signature is requested, clients will see an option to Download and Sign from their Task List. Once signed, the client can use the Upload and Mark as Signed option to indicate the signature has been applied. Both signed and unsigned returns will be available from the client's Document Locker.

What's coming next for Business Requests

Client Collaboration is releasing the business client tax return workflow requests in phases. We're excited to be providing you with all the features described above with the 3.7 release, but we still have more planned to come in future releases:

- 2-Way Messaging for business clients
- Sending Invoices to business clients
- Create Single Requests for business clients
- Manage business client users' profile from the dashboard after the request is sent