Wolters Kluwer

Release Notes

Release 4.0
December 2022

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 4.0

This bulletin provides important information about the 4.0 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 Updates

Tax Year 2022 Update
Client Collaboration has been updated for tax year 2022, allowing your firm to create new requests for 2022 tax returns for your Individual and Business tax clients. Prior to creating client requests for the new tax year, we recommend you review, update, or add the Engagement Letter, Organizer, and Document Request List Templates for all supported client tax types in the Library. Import your business tax clients in bulk using the Import tool available in the Client Users section in the Administration area in Client Collaboration. As a reminder, for your Individual tax requests, taxpayer and spouse name, and email addresses come from Client Manager in CCH Axcess.

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

> **Note**: Tax documents for tax year 2021 are no longer available for download from the action menu in the status screens.

New Filter Option for Create and Send Requests in Batch for Clients Setup Last Year
In the batch request creation process, on the Clients & Services step, a new filter option "Find only client's setup last year" has been added. When toggled on, only clients who were setup in Client Collaboration last tax season will show up in the client list.

Invoice Center for Business Clients
The Invoice Center is now available for your business client requests. You can upload invoice files in the Invoice Center and the invoice file will be delivered to the Billing pane on your client's home screen in their collaboration hub. Invoice files can also be accessed in the Document Locker. From the Invoice Center, you can download or delete an existing invoice. You can access the Invoice Center for a client request from any status after the request has been sent.

Manage Business Client Users from the Client Progress Status
After the business client request has been sent, you can manage business client users for each business request from the Client Progress Status screen. Select the people icon for a client request and the Client Users screen displays where you can Add, Link, Edit, and Unlink users. In this release, if you add a new business client user from the Client Progress status, go to the action menu for this request and select the Resend Invitation link to invite the newly added user.

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

Client Tax Type Now Persists in the Library
When switching between the Engagement Letter, Questionnaire, and Document Request List tabs in the Library, the last selected client tax type will persist as you move through the various screens and tabs.

Informational Message has been added to Create Single for Modifying a Taxpayer or Spouse Email Address
Next to the Client Email Address label on the Create Single screen for an Individual tax request, an informational message is available with additional information when a taxpayer or spouse email address is modified.

New in this Release - Client Updates

Client Collaboration Updated for Tax Year 2022
The Tax Organizer for the supported client entity tax types has been updated for tax year 2022, based on tax legislation changes applicable for tax year 2022.

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

Billing Pane
The Billing pane is now available to your business clients on the Client Collaboration home screen. Your business clients can review their invoice, mark the invoice as paid, and pay their invoice using the Pay link if the firm has configured the Electronic Payment Gateway URL setup in Administration. If your client has access to multiple service requests, your client can view and pay invoices for all requests from the Billing pane without having to switch service requests.

Helpful Sites Pane
The Helpful Sites pane has been added to your Individual tax clients home page with links to the IRS payment and refund web pages.

Client Login
Ease of use improvements have been made to the Client Collaboration login screen. The reference "this is not your email" has been removed from the User ID field. When your client's password expires, we modified the message that displays on the client login screen with descriptive information that the password has expired. Your client can use the Forgot Password option on the login screen to reset their expired password.

Welcome Back Email Improvements
Returning clients will receive a Welcome Back email when the firm sends the new tax year request. This email now includes a link to view a video explaining how to reset the password if it has been more than 90 days since their last log in.

Client Registration Link
When resending the invitation email to your clients within 90 days from when the first invitation email was sent or when inviting a client to another request within the same time frame. The registration link remains active in the subsequent invitation emails. This allows your client to click an active registration link from any invitation email sent within this time frame. Once 90 days have passed from when the first invitation email was sent, the registration link will expire and a new invitation should be resent if your client did not register within the previous 90 days. Your client can also use the Forgot User ID option on the client login screen to receive a new registration link if they have not registered yet.

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 4.0 release, but we still have more planned to come in future releases:

- 2-Way Messaging for business clients
- Create Single Requests for business clients