Wolters Kluwer

Release Notes

Release 4.3
May 2023

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 4.3

This bulletin provides important information about the 4.3 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

Managing Your Clients' Document Request List After Sending
With this release, the document request list you sent to your client is now accessible in the firm interface. You will be able to view and further customize the document request list on a client-by-client basis. You can add a new line-item to the document request list to request a new file, edit the description of an existing line item, or delete a line item for a requested file that may no longer be needed. You will also be able to upload files on behalf of your client, download individual files, and add statuses such as "No Longer Applicable" to a line item. Any file that is uploaded by the firm will be tagged to easily identify which files were uploaded by the firm.

All changes made in the document request list will be published to your client in real-time to allow both you and your client to work from the same list. You can open a client's document request list from the Actions menu for any client type from the Client Progress, Return Ready to Start, and Return in Progress statuses.

Move Documents in the Document Request List Using Drag and Drop
After opening a client's document request list in the firm interface, you can move documents previously uploaded to a new location in the document request list using the drag and drop method for additional organization of the documents. Moving a file to an uncompleted line item in this way will mark the line item as complete with a green checkmark icon.

Library Editor Improvements
Improvements have been made in the Library to retain the formatted text copied from an outside application into the editor. Previously, some text formatting was lost during the copy and paste process.

New in this Release - Client Updates

New Tag in the Document Request List for Files Added by the Firm
With the new feature allowing the firm to upload files to the document request list on behalf of the client, a new "File Added by Firm" tag will display in the client's document request list next to the file uploaded by the firm.

Move Documents in the Document Request List Using Drag and Drop
Your clients can move documents previously uploaded from any location in the document request list to a new location in the document request list using the drag and drop method for additional organization of the documents. Moving a file to an uncompleted line item in this way will mark the line item as complete with a green checkmark icon.

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

Fixed in this Release

Files Not Available to Download
Additional error handling has been implemented to further prevent the "File not available for download" error when downloading the tax documents.

Printing Taxable Events
In some instances, the answers in the Taxable Events page were not displayed in the first download of the organizer or tax documents. This issue has been resolved.

Improved Performance
Additional client access optimization has been added to improve performance for firms with a large number of clients.