

Release Notes

Release 4.4 July 2023

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 4.4

This bulletin provides important information about the 4.4 release of CCH Axcess™ Client Collaboration. Please review this bulletin carefully. If you have any questions, additional information is available on CCH <u>Support Online</u>.

New in this Release

Create and Send a Single Request for Business Entities

With this release, you can now create and send a single request to a business client. From the Create Single Window, you can search for a business client, add/edit client users invited to the request, and modify due dates. Additionally, you can customize the Engagement Letter, Questionnaire, and Document Request List templates prior to sending to your business client from create single.

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

Fixed in this Release

Minor bug fixes and updates.