

CCH Access™ Client Collaboration

Welcome to CCH Access Client Collaboration Release 4.6

This bulletin provides important information about the 4.6 release of CCH Access™ Client Collaboration. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

CCH Access™ Workflow and Client Collaboration Integration

We are excited to announce the integration of CCH Access Client Collaboration with CCH Access Workflow, providing enhanced visibility and convenience for managing client requests. Users can view the progress of Client Collaboration requests from the Workflow Control Sheets, as well as navigate to the Client Collaboration application from My View in Workflow.

1041 Fiduciary Personalized Document Request List

When creating the 1041 Fiduciary client request, the Document Request List will now include requested documents based on the prior year's tax return data.

Prior year tax return data for Business Entity Requests are now included in the Questionnaire

When creating business entity requests, the Questionnaire will be created using the prior year tax return data, when available. Client Collaboration supports the following business entity tax types: Corporation, S-Corporation, Partnership, Employee Plan, Non-Profit, and Fiduciary. The following prior year information is now included in the questionnaire:

- Business Information
- Address Information
- Banking Information

Connections Feature Discontinued

With the 4.6 release, Client Collaboration has removed the Connections feature. This option allowed your clients to add a digital Connection to their financial institution(s) in the Document Request List. Unfortunately, this service has been discontinued and is no longer available from our vendor partner. Any files previously added via a Connection will still be accessible in the Document Request List for tax year 2022. We are currently exploring alternate solutions and hope to offer a replacement in a future release.

Fixed in this Release

Minor bug fixes and updates.