Wolters Kluwer

Release Notes

Release 5.0
December 2023

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 5.0

This bulletin provides important information about the 5.0 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

Tax Year 2023 Update

With this release, Client Collaboration is updated for Tax Year 2023, allowing you to create new requests for 2023 tax returns for both your Individual and Business tax clients. With this update, tax documents for Tax Year 2022 are no longer available for download from the action menu in the status screens. Client Collaboration supports the following entity tax types: Individual, Corporation (C-Corp and S-Corp), Partnership, Fiduciary, Employee Plan, and Non-Profit.

Client Collaboration Taxpayer Mobile App

We are excited to announce Client Collaboration now offers a taxpayer mobile application for iOS and Android devices. The mobile app provides a simple interface for your clients to connect to your firm, sign their engagement letter, answer the questionnaire, attach documents in the document request list, and sign the completed tax return.

It's simple for your clients to start using the mobile app.

- Invitation, Welcome Back and Reminder emails have been updated with a link and instructions to download and log into the mobile app.
  - Client Collaboration is available for download in the Apple Store and Google Play Store.
  - New users invited to Client Collaboration registering on their mobile device will automatically be taken to their device's app store to download it after their registration is completed.
- The first time your client launches Client Collaboration on their mobile device, they will be prompted to connect to your firm using a Firm Key.
  - The Firm Key can be found in the email notification. The Firm Key is also found in your Client Collaboration firm side application in Administration > Firm Information > Branding. It is the last set of unique characters after the main URL: https://clientcollaboration.cchaxcess.com/#/firm/x00Yc00C
  - Once your client connects to your firm, they will not be prompted for the Firm Key again.
  - Your client will log into the mobile app using the same login credentials used when logging into the web desktop interface.

Additional features available in the mobile app include:

- Uploading documents to the Document Request List using the built-in Doc Scanner, Camera Roll, or the device's local storage.
- Home page with badge count will help them track open tasks that require attention.

- Modified task list with open tasks displayed at the top and completed tasks displayed at the bottom.
- Automated push notifications send when the status of the request changes if your client allows notifications on their device.

In this release, the following features are not available in the mobile app: Document Locker, 2-Way Messaging, and Billing.

8879 Completion Certificate
The 8879 Completion Certificate is now available to the firm user for download in Client Collaboration from the Delivery Status column and the Document Locker.

8879 Individual Return Email Notification
Emails sent to the taxpayer and spouse upon sending the 8879 for electronic signature have a direct link to log into their Client Collaboration hub to begin the signing process completing their task list. Note, the existing signing link directly to the document is still available in the email notification and can be used by the client to sign the 8879.

1040 Document Request List Sorting
The 1040 document request list sorting has been re-ordered to match the tax return sequence when the organizer is created from the prior year tax return data.

1041 Document Request List Created with Prior Year Return Data
When there is a prior year 1041 tax return, the document request list in the organizer will be built using the prior year return data.

Enhanced User Management for Individual Requests
You can now manage your client users from any status in the dashboard after the request has been sent by clicking on the people icon. With the enhanced user management feature, you no longer need to un-invite the spouse if not required to sign the engagement letter. Instead, use the Not a Signer option available in User Management.

- Invite non-taxpayer users (up to 20 users can be invited to a request).
- Designate engagement letter signers:
  - Primary Signer
  - Secondary Signer
  - Not a Signer
- Update taxpayer and spouse email address from any status without resending the request.

Engagement Letter Enhancements
The engagement letter has been enhanced with the following features.

- Page break paragraphs can be inserted in the engagement letter templates.
- The *and keyword logic has been enhanced to support any combination of first name, last name, and titles.
- Clients will be required to draw their name when electronically signing the engagement letter. Typed names are no longer allowed for electronic signatures.

Fixed in this Release

- Additional checks have been added ensuring uploading and downloading documents are completed.
- Minor bug fixes and updates.