

CCH Access™ Client Collaboration

Welcome to CCH Access Client Collaboration Release 5.4

This bulletin provides important information about the 5.4 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 - Firm Updates

Tax Return Center is now Available for Individual Client Requests

The Tax Return Center has been added to Individual Client Requests, accessible to firm users via the actions menu for the following statuses: Return Ready to Start, Return in Progress, Awaiting Return Signature, Return Signature Received, and Finalized.

When an Individual Tax Return is sent for e-sign from CCH Access Tax, the client request will automatically move to the Awaiting Return Signature status. Here, users can begin tracking the tax return electronic signature process. Once the tax return is fully signed by all required signers, users can download the signed tax return along with the completion certificate, from the Tax Return Center.

Tax Return Center has been Added to the Finalized Status for Business Client Requests

Users can now access the delivery, download, and delete functions for business tax returns directly from the Finalized status using the Tax Return Center.

Option to Delete the Signed 8879 Tax Return

In the Tax Return Center, users will be able to delete the signed 8879 tax return for both Individual and Business Client Requests for all the statuses the Tax Return Center is accessible from. When the signed tax return is deleted, it will be removed from both the Document Locker and the client's Review & Sign step on their Task List. This new feature provides firms with the flexibility to delete the signed return as needed.

For instance, if a tax return was delivered and signed by a client, but subsequent changes were made resulting in a new return being delivered, you may want to remove the outdated return to prevent confusion with multiple signed copies in Client Collaboration.

Deleting the signed tax return from the Tax Return Center will also remove the unsigned copy and completion certificate. After deletion, if there are no other signed returns in the Tax Return Center, the request status will be updated.

Engagement Letter Optional Signature Keywords

Optional full signature keywords are now available for engagement letters. Using the keywords, users can add jot blocks for the primary and secondary signers to optionally sign in designated areas with their full name. Optional signature keywords can be found in the eSign Fields section when a paragraph is added or modified. Adding an optional signature keyword to an engagement letter allows clients the flexibility to sign or skip the optional signature step during the engagement letter signing process.

Engagement Letter Completion Certificate

Following the client's completion of the engagement letter e-signing process, the completion certificate is now accessible in Client Collaboration. The completion certificate is included in the downloaded zip file when downloading a client's tax documents from the actions menu option.

Mobile Firm Key

Users now have the option to easily copy the mobile firm key from the Administration | Firm Information | Branding screen and provide it to clients who connect to the firm via the mobile application. Once a client establishes a firm connection using the mobile application, they won't need to enter the firm key again.

Session Timeout

For enhanced security measures, if there is no activity in Client Collaboration for 25 minutes, then users will receive a prompt to extend the current logged-in session. If they do not extend the session within 5 minutes of the prompt, the session will end.

New in this Release — Client Updates

Mobile Document Locker

The Document Locker is now available in the Client Collaboration mobile app. The Document Locker provides users and clients with ongoing collaboration and file sharing throughout the year, even after the organizer and tax return have been completed.

Session Timeout

For enhanced security measures, if there is no activity in Client Collaboration for 25 minutes, then users will receive a prompt to extend the current logged-in session. If they do not extend the session within 5 minutes of the prompt, the session will end.

Fixed in this Release

- In the Document Request List, some firms were unable to download tax documents from their clients. An error occurred during the upload of the file by the client; however, the software reported that the file was uploaded successfully. This caused firm users to receive an error while downloading tax documents. To resolve this issue, we have added additional logic to ensure that uploaded files complete successfully or display a message to the client in case of failure so that they know the file did not upload and they should try their upload again.
- Other minor bug fixes and updates.