Wolters Kluwer

Release Notes

Release 5.6
July 2024

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 5.6

This bulletin provides important information about the 5.6 release of CCH Axcess™ 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

Add Client Responsible Staff Keywords to Engagement Letter Templates
We've introduced client responsible staff keywords for your engagement letters. When you incorporate the client responsible staff keyword into your engagement letter template, the designated responsible staff member in CCH Axcess will be included in the client's engagement letter upon sending. You can manage client responsible staff keywords for your engagement letter templates in the Client Responsible Staff section when editing or adding paragraphs in the Library. This update enables users to streamline their workflow by using the same engagement letter template across clients, even when different staff members are assigned as responsible staff.

Client Responsible Staff Data Refresh
Since Client Responsible Staff can be changed in the CCH Axcess Client Profile at any time, we have added an option to refresh the Client Responsible Staff data in Client Collaboration. Navigate to **Administration > Firm Information > Other Settings and Defaults** to refresh the data or view the last time the data was refreshed.

Download Signed Engagement Letter from Client Request List Dashboard
Users can now download the electronically signed engagement letter and its related eSign completion certificate directly from the Requests Dashboard without having to download all of the tax documents. After the engagement letter is signed by all parties, a new download icon will be displayed in the "Engagement Letter - Letter Signed" column on the Request Dashboard. Clicking this icon will download a zip file containing both the signed engagement letter and the completion certificate.

Send request with missing spouse email address
When creating a single request and the spouse's email address is missing, users can proceed with sending the request for the taxpayer only. After sending the request, users have the flexibility to invite the spouse at any time via the user management screen.

Fixed in this Release

- Minor bug fixes and updates