Wolters Kluwer

Release Notes

Release 5.7
August 2024

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 5.7

This bulletin provides important information about the 5.7 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 - Firm Updates

Send Engagement Letters Early for the Upcoming Tax Season
The Client Collaboration product team is excited to introduce our new feature supporting multiple year client requests that lets tax professionals send engagement letters to clients before the upcoming tax season begins and start sharing files now using the Document Locker. With this enhancement, firms can initiate client agreements and secure commitments in advance, eliminating the need to wait until the tax season begins. This proactive approach streamlines the workflow, ensures timely communication, and helps maintain client relationships throughout the year.

When creating a request, simply choose the tax year from the Tax Year drop-down menu for which you would like to send the engagement letter. When selecting the upcoming tax year, the engagement letter section will be enabled, allowing you to send the engagement letter in advance.

Engagement letters can be sent individually to clients or distributed at scale for selected clients. This flexibility allows users to tailor communication to specific clients or efficiently manage bulk distribution, ensuring all clients are covered in a timely manner for the upcoming tax season well ahead of time.

The organizer section that includes the questionnaire and document request list will become available for distribution as soon as the new tax year begins each year in December. This ensures that user can provide clients with the necessary tools and information right at the start of the season, helping them prepare and stay organized throughout the tax filing process.

Users can easily track the status of engagement letter requests for the current or upcoming tax year by selecting the desired tax year from the Tax Year drop-down menu on the dashboard. This allows you to quickly monitor and manage your clients' tasks, ensuring you and your client stay on top of all tasks sent for the current and upcoming tax seasons.

The feature is available for all supported client tax type requests: Individual, Corporation (C-Corp and S-Corp), Partnership, Fiduciary, Employee Plan and Non-Profit.

Note: The integration with CCH Axcess Workflow currently supports the current tax year request. Support for the upcoming tax year request will be available in a future release.

Document Locker Dynamic Year Tag
With this update, files uploaded to the Document Locker will automatically receive a tag for the corresponding tax year. This makes it easier to organize and quickly identify the tax year associated with each file, simplifying the document management process when accessing the Document Locker.

New in this Release - Client Updates

Clients can Sign their Engagement Letter Early for the Upcoming Tax Season

When sending the engagement letter, clients will be notified the engagement letter for the upcoming tax season is ready for review and electronic signature. Upon logging into their Client Collaboration hub, clients can choose which tax year's request to access. The Task List for the selected tax year will display only the tasks they need to complete, providing a streamlined and organized experience tailored to that specific tax year.

Fixed in this Release

- Minor bug fixes and updates.