Wolters Kluwer

Release Notes

Release 6.0
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CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 6.0

This bulletin provides important information about the 6.0 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

Email Notifications for Key Client Actions
You can now enable email notifications whenever a client uploads a file to the Document Request List or Document Locker, or when they click "Send to my Accountant" after completing their organizer. Additionally, you can customize email configurations to specify who should receive these notifications, ensuring the right people stay informed. To manage these settings, navigate to the Administration => Firm Information => Notifications. Here, you will find the option to enable or disable email notifications for specific client actions, allowing your firm to receive notifications only for the events you choose.

Add Sections in Document Request List Template
With this release, you can create sections within document request list templates, allowing you to group and organize line items more effectively. You can now create up to 250 sections and add up to 250 line items under each section in your document request list template.

Document Request List in Modal Window
The Document Request List will now open in a modal window, allowing you to work on it without leaving your current page. Once you're done, you can simply close the modal and remain on the same status dashboard. Previously, clicking the back button on the Document Request List would redirect users to the home page. This update ensures you stay on the same page where the Document Request List was accessed.

File Upload Details in Document Request List
For files uploaded in the Document Request List, you can now view the upload date and the user who uploaded the file. This information will be displayed below the file name for easier tracking and reference.

Handling client type change in CCH Axcess
With this release, if a client's type is changed in CCH Axcess and an active request exists in Client Collaboration under the previous client type, the system will prompt you to delete the old request before creating a new one with the updated client type. Once the previous request is deleted, users will be automatically linked to the new request with the updated client type.

"Resend Invitation" Activity Tracking
The "Resend Invitation" option in the action menu on the Request Status dashboard allows you to resend invitation or welcome-back emails to clients. With this update, each instance of this action will now be tracked under the "Last Activity" column. You can easily reference the Activity Detail to see when and if the invitation was last sent to a client, ensuring better tracking and communication efficiency.

View Comments When Requests Are Reopened
With this release, when a request is reopened using the "Reopen Request" option in the action menu, any comments entered for the taxpayer will now be visible under Activity Detail. An info icon next to the "Request Reopened" entry shows these comments, providing quick context. This feature applies only to the most recent reopening activity, helping you track communication effectively.

Dynamic Message Box Size Increase
With this release, you can now send longer messages to your clients more comfortably. As you type, the message box will automatically expand to accommodate up to 5 sentences. Beyond that, a scroll option will appear, allowing you to continue typing and view the full message without any hassle.

Alert Icon to show client id/sub id has Unsupported Character
With this release, if a client ID or sub ID contains unsupported special characters that prevent Client Collaboration from fetching prior year returns, an alert icon will appear in the Create Single and Create Multiple pages under the "Return Version" section. Hovering over the icon will display a tooltip informing you that the organizer cannot be created with a prior year return due to the client ID/sub ID issue, allowing you to take the necessary steps to update the client ID or sub ID.

New in this Release - Client Updates

Allow Other Signers (Spouse or Partner) to Sign Engagement Letter from Logged-In User's Session
If multiple signers are required to sign the engagement letter, your client will now have the option to allow another signer to complete the process from their session. This option becomes available only after the logged-in user has signed the engagement letter. The additional signer will be required to complete a one-time password (OTP) validation, and upon successful validation, they will be directed to Nintex (AssureSign) to provide their signature.

This enhancement will streamline the signing process, ensuring faster and more efficient completion of engagement letters.

View and Pay Invoice thru Mobile app
Now if you upload the invoice for a client, they can view the invoice from their Client Collaboration mobile app. They will also have the option to pay the invoice online if you have provided the payment link under Administration => Firm Information => Payments.

Easier Client Login Experience
With this release, we've made updates to simplify the client login experience:

- Remember User Id:

  Clients now have the option to remember their User ID on the login page. When using the same device, they won't need to re-enter their User ID each time they log in.

- Never Expire Password:

  Clients no longer need to worry about their login password expiring every 90 days.

These enhancements aim to provide a more seamless and user-friendly login experience.

Enhanced Client Collaboration web Interface
With this release, we've made the Client Collaboration web interface more intuitive. The Service Selection screen is now more prominent for easier navigation. Additionally, the "Send to My Accountant" option is now available directly within the organizer, allowing clients to promptly notify their accountant once they've completed the organizer, ensuring no step is missed.

Fixed in this Release

- Minor bug fixes and updates.