

# CCH Axcess™ Client Collaboration

## Welcome to CCH Axcess Client Collaboration Release 6.1

This bulletin provides important information about the 6.1 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

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### New "All" Client Type Filter on Home Dashboard

A new "All" option has been added to the "Client Type" dropdown on the Home Dashboard. When selected, it filters requests by the chosen tax year and service type, while including all client types. When "All" is selected as the client type, dashboard tiles will show requests from all client types, providing a more comprehensive overview. Additionally, the Status Dashboard will display requests from all client types, providing a consolidated view of all requests within a specific status.

This update is aimed to streamline your workflow and give you a clearer, comprehensive view on all client requests.

### Get Spouse/Partner e-signature on 8879 Tax Return Without Linking Them to the Client Collaboration Request

A new enhancement on the client side now allows users to enable their spouse or partner to sign the tax return from their logged-in session. With this enhancement, once you publish the 8879-tax return from CCH Axcess™ Tax, Client Collaboration will automatically retrieve the signatory details from CCH Axcess Tax. This means, you don't need to link the spouse to the request and the spouse doesn't need to create a separate Client Collaboration login to review and sign the tax return.

This enhancement will eliminate the need to have separate logins for taxpayer and spouse to sign the 8879-tax return.

## New in this Release - Client Updates

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### Allow Spouse or Partner to Sign 8879 Tax Return Package from Logged-In User's Session

For jointly filed tax returns, clients can now enable their spouse/partner to sign the 8879-tax return directly from their logged-in session. This option becomes available once the logged in user has signed the return. The other signer will need to complete a one-time password (OTP) validation, and upon successful verification, they will be redirected to Nintex (AssureSign) to provide their electronic signature.

This enhancement simplifies and speeds up the tax return signing process, ensuring a more efficient experience for both parties.

## Fixed in this Release

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- Minor bug fixes and updates.