Wolters Kluwer

Release Notes

Release 2.0
December 2020

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 2.0

This bulletin provides important information about the 2.0 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 User Updates

FIRM REQUESTS DASHBOARD

Tax Year 2020 Update
Client Collaboration has been updated for tax year 2020, allowing you to create new requests for 2020 tax returns for your 1040 clients. Any data from tax year 2019 will not be available after this release.

CCH® eSign Integration for Form 8879
Client Collaboration is now tightly integrated with CCH® eSign for the end-to-end electronic signature experience for Form 8879, including IRS-mandated Knowledge-Based Authentication. When uploading 1040 returns to the CCH® Electronic Filing system, you can now choose to send them to clients through Client Collaboration for their review and electronic signature. For joint filers, both the taxpayer and their spouse will receive an invitation to collaborate with the firm. Each user must create their own user ID and password for the Client Collaboration hub and must log in separately to sign the tax return. After all required signatures are received, the return is automatically made available to file in the CCH e-File System. Regarding the 10-day rule, you can resend the return for signatures if the client does not sign on time.

Form 8879 Progress Indicator
A new progress column has been added to the Requests Dashboard to indicate if Form 8879 has been electronically signed by the taxpayer, spouse, or both. A checkmark icon indicates that all required signatures have been received and the return is ready for electronic filing.

> **Note:** This new feature does not change or replace the **s**tatus updates in the CCH Electronic Filing System.

Secure Two-Way Messaging
You can now securely exchange messages with your clients. Messages can be sent by the client or by the firm. Icons next to the client's name on the Requests Dashboard indicate when there are new or outstanding messages that need to be addressed. Users can assign messages to themselves or to one of the client responsible staff roles.

> **Note:** Beginning with the January 2021 release, staff assigned to specified client responsible staff roles will receive an email notification when messages are received. To keep the communications secure, message contents are never sent via email. Instead, users must log in to the Client Collaboration dashboard to retrieve messages.

Message Center
The Message Center lists all the unresolved messages for the logged in user. An icon to access the Message Center is displayed at the top of the screen, next to the user profile icon. Messages are displayed in groups based on the date received (Today, Last 7 Days, Older). A badge on the Message Center icon indicates the number of new or unresolved messages assigned to the logged-in user.

Activity Log
The Activity Log and the Last Activity column provide historical details for the selected client's request. Both have been updated to support the new features in this release, including the Form 8879 eSign process and adding and downloading files from the Document Locker.

DOCUMENT LOCKER

Year-round Data Gathering
Document Locker allows your clients to collect and share documents with the firm throughout the year. Document Locker also serves as the delivery mechanism for firm deliverables such as the final, signed 1040 tax return. Document Locker provides up to two-year retention for files. For joint filers, both the taxpayer and their spouse have full access to all files in the Document Locker. Firm staff with proper client access rights and Document Locker permissions can also access the Document Locker.

Filtering Large Document Locker File Lists
You can filter large file lists in Document Locker using one of the on-screen filter options. You can filter file lists by filename, date uploaded, expiration date, or tags.

Adding Files to Document Locker
You and your clients can each add files to the client's Document Locker using drag-and-drop or by browsing your device to locate files to be uploaded. Document Locker does not include folders because they are limiting (only one folder per file) and because historically clients have found them to be confusing. Instead, Document Locker includes tags which may be applied to files so that they can be identified or located at a later date. Files are uploaded immediately. You can tag files immediately after upload or at a later time.

Tagging Files in Document Locker
After uploading files to Document Locker, you and your clients can optionally tag the files to make them easier to identify or locate. While uploading files, you can choose to skip tagging, and files can be tagged later by the client or the firm. You can add up to 10 tags per file.

FIRM ADMINISTRATION UPDATES

Firm User Access and Permissions
You can now assign access rights and permissions to firm staff to control access to the application and to client data stored in the application. Client Collaboration permissions are set up in the CCH Axcess permission module with other CCH Axcess permissions. In addition to the specific permissions listed below, Client Collaboration applies client access groups to determine which clients each user has access to. With this release, the following permissions are available:

- **Dashboard > Launch Client Collaboration** - Users with this permission can launch Client Collaboration from CCH Axcess Dashboard and log into the Client Collaboration website.

- **Request Dashboard > Client Requests** - Users with the View permission can view the Requests Dashboard and individual requests, based on client access rights. Users with the Add permission can create new requests individually or in batch. Edit and Delete permissions allow users to edit or delete existing requests.

- **Request Dashboard > IND Organizer and Tax Documents** - Users with this permission can download client organizers and uploaded tax documents for the clients which they have access to.

- **Request Dashboard > Document Locker** - Users with this permission can access the client's Document Locker, used for year-round data gathering.

- **Library > IND Templates** - Users with this permission can create, edit, and apply templates for individual tax returns. These templates include engagement letter templates, questionnaire templates, and document request list templates.

- **Administration > Administration** - Users with this permission can access the Administration module of Client Collaboration to modify settings such as branding, messaging, and tag management.

Tag Management
Tags are added to files to classify them and make them easier to identify and find. Client Collaboration includes 14 default tags which can be assigned to files that are added to the Document Locker. Administrative staff can create new tags, rename tags, delete tags, or merge 2

or more existing tags. They can also view the number of files assigned to each tag. You can assign up to 10 tags per file. There is no limit to the number of tags the firm can create.

Messaging Settings

Administrative staff can enable or disable the new secure two-way messaging feature in Client Collaboration. When enabled, administrators can configure the primary and backup message assignee on the firm side by selecting client responsible staff roles. These users receive notifications when clients send messages to the firm.

New in this Release - Collaboration Hub Updates

Client Collaboration Hub Tiles

A new tile has been added to show client users who have access to the hub (taxpayer and spouse). A new billing tile has also been added to show invoices that you have sent to the client. The "It's Tax Time" tile has been updated for tax year 2020. A new Message Center tile has been added so that your clients can see new messages or messages needing their attention.

Client Organizer Updated for Tax Year 2020

The 1040 Tax Organizer in Client Collaboration has been updated for tax year 2020, based on tax legislation changes applicable for tax year 2020. Some questions have been added or removed. The client's Task List has also been updated for easier navigation through the steps.

1040 Schedule C and E - Business and Rental

A new category tile has been added to the questionnaire to simplify reporting Business and Rental/Royalty income and expenses for your clients. Prior year information is included for reference, when available. The Schedule C business organizer is divided into seven sub-categories: General, Income & Cost of Goods Sold, Expenses, Assets, Vehicles, Home Office, and Statutory Employee Expenses. Taxpayers can add multiple businesses or rental properties and can add multiple assets and vehicles for each. The Schedule E rental/royalty organizer is divided into the same sub-categories, except for Statutory Employee Expenses. Placeholders are included in this release, with full functionality available with the January 2021 release.

Secure Two-Way Messaging

Your clients can now securely exchange messages with your firm. Messages can be sent by the client or by the firm. Staff assigned to specified client responsible staff roles will receive the initial email notification when messages are received from clients. To keep the communications secure, message contents are never sent via email. Clients must log in to Client Collaboration to retrieve messages. Icons next to the client's name on the Requests Dashboard indicate when there are new or outstanding messages that need to be addressed.

Message Center

The Message Center provides a list of all unresolved messages for the logged in user. An icon to access the Message Center displays at the top of the screen, next to the user profile icon. Messages are displayed in groups based on the date received (Today, Last 7 Days, Older). A badge on the Message Center icon indicates the number of new or unresolved messages assigned to the logged-in user. A new Message Center tile has been added to the Client Collaboration Hub so that your clients can see new messages or messages needing their attention when they log in.

Supported Web Browsers

The Client Collaboration taxpayer interface has been fully tested with and supports the following web browsers:

- PCs: Latest versions of Google® Chrome™ or Microsoft® Edge (Chromium-based)
- Macs: Latest versions of Google® Chrome™ or Apple® Safari®

Form 8879 eSignature Process

When the tax return is ready for the client to review and sign, they receive an email with instructions. Clients can access the signing link from the email or from the Task List in Client Collaboration. Clients verify their identity using an IRS-mandated Knowledge-Based Authentication system and can then review and electronically sign their return (Form 8879). The signed copy of the return and Form 8879 is automatically delivered to the client's Document Locker for easy retrieval, and the firm is notified that the return is ready to file.