Wolters Kluwer

Release Notes

**Release 1.0**
**December 2019**

# CCH Axcess™ Client Collaboration

## Welcome to CCH Axcess™ Client Collaboration v. 1.0

This bulletin provides important information about the 1.0 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

This is the first release of Client Collaboration, which focuses on the Firm User experience, enabling firms to create and stage 1040 return engagement letters and tax organizers. In a follow-up release, these engagements can then be sent to taxpayers for completion.

### LIBRARY MODULE

**Paragraph Templates**
Paragraphs are the building blocks for Engagement Letter templates. Create and edit paragraph templates, and then combine paragraphs to form letter templates. Format paragraph text by adding bold, italics, underline and other basic text formatting. Add images to paragraphs such as firm logos for Headings or partner signatures for specific Engagement Letters. Use **Merge Fields** to import client data such as name, address or other fields including electronic signature fields. Keep Paragraph Templates organized using predefined folders such as "Address Block" and "Firm Responsibilities".

**Engagement Letter Templates**
Create you firm's Engagement Letter Templates using predefined paragraph templates. Client Collaboration includes the AICPA Engagement Letter Template by default. Use the AICPA template or create your own Engagement Letter templates from scratch or by copying from an existing template.

- Create and edit Engagement Letter templates, and then use them to create Engagement Letters to send to clients
- **Drag and Drop** paragraphs into the Engagement Letter Template
- Easily add and rearrange paragraphs and manage duplicate paragraphs

**Firm Branding**
Upload the firm's logo, which will appear in email notifications, login screens and within the taxpayer application. View the firm's unique Taxpayer Login URL, to share it with taxpayers as needed.

### ENGAGEMENTS MODULE

**Requests Dashboard**
Create Individual 1040 Return Workflow Requests for tax year 2019 in batch or one-at-a-time. Requests are based on prior year proforma data from CCH Axcess Tax. Blank organizers cannot currently be created.

- **Create requests to send later** - Create and stage requests to be sent to Taxpayers beginning with the next release. 1040 Return Workflow Requests include the Engagement Letter, Tax Organizer or both.

- **Track requests** - After sending 1040 Return Workflow Requests to Taxpayers and they begin working, you will be able to track clients' progress on the Requests Dashboard. Easily identify which Engagement Letters have been signed, and whether clients have made progress in the Tax Organizer's questionnaire or document request list. Quick access to view the list of completed, overdue or in process organizers.

  **Note:** The Taxpayer interface will launch with the next release, anticipated in mid-January to coincide with taxpayers' receipt of annual tax statements.

**Filter Sets** - You can create, edit and name re-usable Filter Sets based on Office, Business Unit, or Tax Return Signer.  Then, use Filter Sets to filter large lists of requests.

## Known Issues

**Supported Web Browsers**
CCH Axcess Client Collaboration currently works best with the Google® Chrome browser.