Wolters Kluwer

Release Notes

Release 1.1
January 2020

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess™ Client Collaboration v. 1.1

This bulletin provides important information about the 1.1 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

This is the first release of the *Client Collaboration Hub*, the Taxpayer's experience in Client Collaboration.

CLIENT COLLABORATION HUB (Taxpayer Application)

The Client Collaboration Hub is the Taxpayer's secure interface to the Client Collaboration application.

Hub Home
The Client Collaboration Hub Home screen is the first page taxpayers will see when they log into Client Collaboration. Here, taxpayers can access their 1040 Return workflow or view information such as firm contact information and Connections to online accounts.

- **It's Tax Time!** - When the firm sends a new request to a client, a new card appears on the taxpayer's Hub Home screen. Clicking Get Started launches the Tasks List, where the client can view the step-by-step workflow and required tasks to complete.
- **Year & Returns** - This card will provide access to historical returns.
- **Connections** - The card provides information about the Connections feature, which allows clients to connect to their online financial accounts to automatically retrieve year-end statements.

ENGAGEMENTS MODULE (Firm Application)

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 now or later** - Create requests to be sent to Taxpayers. 1040 Return Workflow Requests include the Engagement Letter, Tax Organizer or both.

Known Issues

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