CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 1.3

This bulletin provides important information about the 1.3 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

Update Due Dates for Open Requests
You can now update the due dates for both engagement letters and/or tax organizers, to accommodate the updated tax deadline of July 15, 2020. You can update due dates for clients in batch, or one-at-a-time, if desired.   From the Overdue or Open Requests status, select Requests you want to extend with the checkmark option at the left, or select all Requests on a page with the checkbox at the top. After selecting Requests, the Edit Organizer Settings button will appear. When selected, make updates to the due dates within the right panel.

Update Settings for Created Requests
In addition to updating the due dates for both the engagement letters and/or tax organizers, for Requests Created but not yet sent, you can also change the engagement letter template that will be sent to your client. From the Created status, select Requests you want to update with the checkmark option at the left, or select all Requests on a page with the checkbox at the top. After selecting Requests, the Edit Organizer Settings button will appear. After clicking this button, change the engagement letter template by selecting a different template from the dropdown within the right panel.

Automated Billing
Client Collaboration now supports an automated billing system which will provide billing records to the CCH Billing System, which are then reflected on customer invoices. Customers should start seeing entries for any overages beginning with the next billing cycle.

Resolved Issues

The following issues have been resolved with this release.

- We have fixed an issue that resulted in users receiving 'Connection with dependent service(s) refused' error messages.