

CCH Access™ Client Collaboration

Welcome to CCH Access Client Collaboration Release 1.6

This bulletin provides important information about the 1.6 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

Library Updates

New Keywords for Engagement Letters

More than 30 new keywords have been added to the Library in the following categories: Client Fields, Date Fields, and Firm Fields. These new keywords allow you to include more details about taxpayers, their spouses, and firm or office locations in your Engagement Letter templates, and like other keywords, pull data directly from the CCH Access database when the letters are generated.

New eSign Keywords for Engagement Letters

Eight new eSign-related keywords have been added to the Library and can now be used in Engagement Letter templates: Mandatory Taxpayer Initials, Mandatory Spouse Initials, Optional Taxpayer Initials, Optional Spouse Initials, Spouse Signature, Spouse Signature Date, Taxpayer Signature and Taxpayer Signature Date. The Client Signature keyword has been renamed to Taxpayer Signature and this will automatically be reflected in existing and new templates. Using these new options, your clients can be required to initial or sign at various places in the letter. The optional initials and signature fields allow you to provide clients with optional add-on services or other options not previously possible.

New in this Release - Client User Updates

eSigning Engagement Letters

For joint returns, both the Taxpayer and Spouse may now be required to sign and/or initial the Engagement Letter. To fight fraud, the Taxpayer and Spouse must each create a separate user ID, login, and eSign.

Document Request List Expanders

On the Document Request List, files retrieved using the Connections feature will now appear in a new expander called Connections, separate from the Uncategorized user-uploaded files, to make them easier to locate and identify. The Uncategorized expander will now only show files uploaded using drag and drop by the taxpayer or spouse. The Itemized Deductions expander has been renamed to Deductions. For Connections and Uncategorized expanders, a total count of files in each section is displayed in the section header. For Income and Deductions, a count of files attached and requested (3 of 7, for example) is displayed in the section header instead.

Questionnaire Updates - Driver's License Number

The "Driver's License Number" field has been renamed to "State Issued ID" for both the taxpayer and the spouse to support both Driver's License Numbers and State Issued ID numbers.