

CCH Access™ Document and Integrated Portal

Welcome to CCH Access Document 2023-4.1 and Integrated Portal

This bulletin provides important information about the 2023-4.1 release of CCH Access™ Document and Integrated Portal. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

Distributed Storage Platform

With this release, an update is required for any Distributed Storage Platform server(s) you have enabled. Log into the machine(s) where Distributed Storage Platform is enabled. **Click Install and Update Manager > Redirect to Update Tab > Check the Distributed Storage Platform checkbox > Click the Update button.**

Recycle Bin — File Type

A new search option, File Type, has been added to the Recycle Bin. This enhancement allows users to filter and locate deleted files more efficiently based on their specific file types.

Recycle Bin — Deleting File(s)

As a safeguard, users must now type "DELETE" or "EMPTY" to proceed before deleting file(s) from the recycle bin grid.

Client Access Password

To enhance security, starting with this release, clients cannot reuse their last three passwords when updating login credentials. This option applies only to customers who are licensed for Integrated Portal.

Client Portals

Pagination functionality has been implemented within the Client Portals section of the Client Manager, enabling users to view more than 25 portals per page. This option applies only to customers who are licensed for Integrated Portal.

Technical Corrections

Published File Comment

When you publish a file and include a comment, that comment is now included in the email notification sent to the customer.

Printing Tax Returns with "V" in the Name

The issue where the letter "V" was not being displayed correctly when printing a tax return to Document has been resolved.

Share Safe

The issue where clients were able to send a file to the firm without selecting a staff name has been resolved.