

CCH Axcess™ iQ

Welcome to CCH Axcess iQ 7.5

This bulletin provides important information about the 7.5 release of CCH Axcess™ iQ. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

Re-designed affected client list

More easily identify the clients affected by recent tax legislation with the newly re-designed Affected Clients list. Now, the client list is the focus of the page, taking the most screen real estate, with client criteria and filter options organized conveniently into their own panes. Personalizing your list by adding or removing columns and enabling filters like Tax Year, Office, Client Responsible Staff, and Signer is still just a click away.

Advanced client list filters

Pinpoint the most relevant affected clients in each list by enabling column filters. Each column can now be used to narrow the list according to the type of data displayed in the column. For instance, filtering by the "Adjusted Gross Income" and "Client Since" columns may display your high-net-worth clients who have been around the longest.

Additionally, finding a specific client in your affected client list is much easier with the new quick search bar. Simply type a client name or client ID in the search bar above the affected client list to determine whether that client appears in the list. This removes the need to cross-reference each client list with the client dashboard.

Topic Filters Event List and Client Dashboard

Filter your iQ events in both the events list and client dashboard using a dynamically updated list of topics like business or education tax credits. This allows you to focus your attention on the opportunities that align most closely with your firm's strategy for tax advisory services.

Client Dashboard API

Alongside the existing collection of event list and client list APIs, the new client dashboard API can return a list of iQ events that affect a specific client. Simply include a client ID with the API request, and a list of relevant events is included in the response.