

CCH Access™ iQ

Welcome to CCH Access iQ 7.7

This bulletin provides important information about the 7.7 release of CCH Access™ iQ. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

Email Notifications

Receive weekly email notifications informing you about new CCH Access iQ events. Opting in is easy: just turn on the new toggle switch in the CCH Access iQ events list settings pane and begin receiving email notifications about events released in the last seven days as well as the number of clients affected by each event. Regular and informative email reminders will make CCH Access iQ more valuable to you and your colleagues as it will be now less likely for potential advisory opportunities to go unnoticed.

Date Range Filter

View CCH Access iQ events that were released during a specific period so that you can focus on the advisory opportunities which impact your clients the most. The new date range filter in the CCH Access iQ event list can be configured with separate beginning and end dates or with an end date of "Today." The latter option displays only on the items that were released since a specified date.

Support for 2023 Tax Returns

CCH Access iQ now populates the affected clients lists for selected iQ events with 2022 and 2023 tax returns. For those iQ events that support multiple tax years, clicking the desired tax year in the affected client list and then clicking the Update Clients button will switch the tax year.

Standardized Affected Client List Columns

Filter affected clients lists more narrowly by using these standardized column filters, which are now included in every event, depending on return type.

- Individual
 - Sch C Net Profit or Loss
 - Adjusted Gross Income
- Partnership
 - Net Income or Loss
- S Corporation
 - Income (Loss) Reconciliation
- Corporation
 - Taxable Income Before NOL

- Employee Benefits
 - No of Participants at the End of Plan Year
- Estate and Gift
 - Gross Estate Less Exclusion
- Exempt
 - Net UBTI
 - Revenue Less Expense-CY
- Fiduciary
 - Taxable Income