

CCH Access™ Knowledge Coach

Welcome to CCH Access Knowledge Coach August 2022

This bulletin provides important information about the August 2022 release of CCH Access Knowledge Coach. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New Features

View prior engagement responses in obsolete forms after content update

- When an Access Knowledge Coach form is no longer valid in the updated title version, it will still be included in the engagement after roll forward or update form. The form will have "obsolete" appended to the form name; so, you can still review prior year responses and delete the form.

Fixed Issues

- Filled in data will reset when unselecting and reselecting custom program steps in the Audit 800 series forms
- Checkbox on lock engagement confirmation message will remain selected by default when the message is displayed
- Disclosure checklist will load more quickly
- Only Potential Error diagnostics will be deleted when selecting to delete this diagnostic type

New Content

- 2022 Knowledge-Based Non-Traditional Engagements — Examinations
- 2022 Knowledge-Based Non-Traditional Engagements — Agreed Upon Procedures
- 2022 Knowledge-Based Non-Traditional Engagements — Reviews
- 2022 Knowledge-Based Non-Traditional Engagements — Consulting
- 2022 Knowledge-Based Audits of Governmental Entities

Getting Started with Knowledge Coach

Prerequisites:

- CCH Access™ Install and Update Manager must be installed. For help with the installation, please review the Knowledge Base article [How do I install CCH Access Install and Update Manager?](#)
- Use the CCH Access™ Install and Update Manager to install the CCH Access Dashboard. For help with the installation, please review the Knowledge Base article [How do I install, repair, uninstall or download CCH Access™ products?](#)
- Users must be created in CCH Access™ prior to logging in. For help with creating users, please review the Knowledge Base article [How do I add or create new staff users in CCH Access?](#)
- A client must be set up in CCH Access before staff members can create engagements for the client. For help creating clients in CCH Access, please review the knowledge base article [How do I create a new client in CCH Access?](#)

Once users are created, they can log in by doing the following:

1. In a recommended web browser (listed below), go to <https://Knowledgecoach.cchaccess.com>.
2. Log in with your CCH Access credentials.

Note: Your firm can use Knowledge Coach with Passive ADFS. For information on the use of ADFS with CCH Access, please review the Knowledge Base article [Introduction to Federation Services Authentication \(ADFS\) in CCH Access or CCH ProSystem fx Document](#).

3. Click "Start New Engagement" to create an engagement and search for the CCH Access client.

Browsers Supported with this Release

- Microsoft® Edge® (Internet Explorer® is no longer supported)
- Google® Chrome™ (Recommended)
- Mozilla® Firefox®