

# CCH Access™ Knowledge Coach PCR

## Welcome to CCH Access™ Knowledge Coach PCR

This bulletin provides important information about the August 2020 release of CCH Access™ Knowledge Coach PCR. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

## New in this Release

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### CCH Access Knowledge Coach PCR

Knowledge Coach PCR is now available for firms specializing in performing preparations, compilations, and reviews. Knowledge Coach PCR is part of the CCH Access suite and is the first cloud-based offering for implementing the knowledge-based approach for preparations, compilations, and reviews. The proven knowledge-based approach increases quality by ensuring compliance with the applicable attest standards, while leveraging the power of the cloud to increase efficiency and collaboration among team members. Key features include:

- Leverages the common elements of the CCH Access platform, such as single sign on for all applications and common databases for staff and client information
- A complete set of forms and practices aids for implementing the knowledge-based approach for preparations, compilations, and reviews
- Team collaboration with multi-users working in the same engagement at the same time
- Real-time diagnostics and contextual notifications that guide users through the engagement
- Access to engagements at any time and from anywhere
- True cloud-based solution with no infrastructure costs

### Knowledge-Based Preparations, Compilations and Reviews

Knowledge Coach PCR helps accountants efficiently and effectively perform financial statement preparation engagements, compilations, and reviews in accordance with Statements on Standards for Accounting and Review Services (SSARS) issued by the Accounting and Review Services Committee (ARSC) of the American Institute of Certified Public Accountants (AICPA).

The Knowledge-Based Preparation, Compilation and Review methodology emphasizes using knowledge of the entity to perform preparation, compilation, and review engagements by facilitating the flow of information so that the understanding obtained in each process affects the decisions made in the next. Although the accountant will likely perform most steps in this methodology sequentially, conducting an engagement is not necessarily a linear process. Knowledge gained from preliminary engagement activities helps the accountant design and customize engagement procedures; evidence gained from procedures performed is evaluated, and the appropriate accountant's report, if any, is issued. This edition includes specific up-to-date guidance for conducting preparation, compilation, and review engagements in accordance with the SSARS.

Knowledge Coach PCR includes industry specific guidance for performing preparation, compilation, and review engagements for the following industries:

- Commercial Entities

- Common Interest Realty Associations
- Construction Contactors
- Dealerships
- Not-for Profit Entities
- Real Estate Entities

Industry specific release notes are available for each industry on the [support site](#).

The 2019 forms include CCH® Accounting Research Manager® material links to specific guidance that provide instant access to detailed analysis related to the steps and processes discussed in the workpapers.

As industry titles are updated, they will be automatically available to users inside of Knowledge Coach PCR without the need to manually download and manage installations.

#### **Updated Terms of Use**

All users must accept modified terms of use the first time they log in after the deployment of release 2019-4.1. These terms may be accepted during login to any one of the following:

- CCH Access products that are installed on your computer
- Most web sites that include cchaccess.com in the address, such as [collaboration.cchaccess.com](#), [financialprep.cchaccess.com](#), and [knowledgecoach.cchaccess.com](#)
- Third-party applications using [Open Integration Platform Token Authentication](#)

CCH Access users who attempt to log in to some third-party applications using [OAuth 2.0 Preview APIs](#) will receive an error message until terms are accepted using one of the login methods described above.

#### **User Phone Number Prompt During Login**

To prepare for IRS mandates regarding 2-step verification, a phone number is now required for all users if your firm uses the [CCH Access login method](#). This change does not affect firms using Active Directory or Federation Services to log in.

After a user enters their password and completes 2-step verification, if the phone numbers on the staff profile are empty, CCH Access prompts the user to enter a direct phone number. The user must verify the phone number by either:

- Entering a code sent by SMS text message
- Pressing # after answering an automated call

After verification, the new phone number is saved to the business phone on the staff profile.

**Note:** This feature allows users to enter and verify a phone number in their own staff profile, even if they don't have permission to edit staff profiles. The behavior and permissions for managing phone numbers in Staff Manager and Open Integration Platform are unchanged.

#### **Secure Connections During Active Directory Sync**

As [previously announced](#), this release updates the connection used for Active Directory sync from standard to secure. If your domain supports a secure connection, then no action is required. If necessary, you may [downgrade to a standard connection](#). This change does not apply if your firm uses the [CCH Access login method](#) or a custom staff synchronization solution.

#### **Replace Federation Services Secondary Certificate**

If your firm is using the [Federation Services login method](#) it is important to have a secondary token signing certificate to ensure uninterrupted use of CCH Access when the primary certificate expires. Previously, you were required to repeat pilot mode, metadata upload, and other steps. Now, you may [add or replace the secondary certificate](#) without these other steps.

### Client Access Group Limit

CCH Access allows up to 1,000 client access groups per account. If more than 1,000 groups exist, the software will not allow new groups until the number of groups is reduced below the limit.

## Known Issues

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### Return Group Can Be Changed Using Client APIs

Previously, return group was not used when included in Open Integration Platform [client APIs](#) used to add or modify clients. Now, the return group is saved when a client is created or modified.

## Getting Started with Knowledge Coach

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### 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

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