

CCH Access™ Knowledge Coach

Welcome to CCH Access Knowledge Coach August 2021

This bulletin provides important information about the August 2021 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 in CCH Access Knowledge Coach

Updates to Sign-off

The following updates to the sign-off process are now available.

- Notifications now display if you attempt to sign-off on a form and there are open diagnostics in the selected Knowledge Coach form.
- To ensure work is complete, preparer sign-off must be complete on the Knowledge Coach form before reviewer sign-off is available.
- Reviewer sign-off must be removed before preparer sign-off can be removed.

New Risk Type Added

A new risk type, "Other," has been added. This risk type can be used to document risks that do not qualify as significant.

New Content Available

- 2021 Knowledge Based Audits of Governmental Entities
- 2021 Knowledge Based Audits of Not-for-Profit Entities
- 2021 Governmental Financial Statement Disclosure Checklist
- 2021 Not-for-Profit Financial Statement Disclosure Checklist

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®