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Release Notes

Release 2019-4.1
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CCH Axcess™ Practice

Welcome to CCH Axcess Practice 2019-4.1

This bulletin provides important information about the 2019-4.1 release of CCH Axcess™ Practice. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

ePay is Now Available to All Practice Users

The ePay feature is now available to all CCH Axcess™ Practice users and no longer requires a license for CCH Client Axcess/Portal. After you set up your payment service provider in Firm Settings, you can add the Pay Now link in invoice headers and footers and in the invoice email. Refer to Help topics Creating Your ePay Merchant Account and Setting Up ePay in CCH Axcess.

Report Builder

Report Builder has been upgraded to the latest version from Microsoft, version 15.

Updated Terms of Use

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

- CCH Axcess products that are installed on your computer.
- Web sites that include cchaxcess.com in the address, such as collaboration.cchaxcess.com, financialprep.cchaxcess.com, and knowledgecoach.cchaxcess.com
- Third-party applications using Open Integration Platform Token Authentication.

CCH Axcess users who attempt to log in to some third-party applications using Ouath 2.0 Preview APIs will receive an error message until terms are accepted during 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 Axcess 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 Axcess 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.

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 Axcess 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 Axcess 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 Axcess 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

All Reports
Saved filters in report options can once again have their values modified.

Filters for "=" and "<>" with the value of "(All)" now include null values across all reports. Filtering by any field '<>' to any value besides (All) will also consider the null values in the result.

AR Register Report
The Deposit Date column now displays regardless of grouping selections.

Billing Report
The Real % w/ Progress column now calculates as expected: (Billed WIP + Write Up/Down + Progress Generated – Progress Applied)/(Billed WIP + Progress Generated – Progress Applied)

Billing Worksheet Report
The header for the Billing Worksheet once again only shows the dates chosen in the filters.

Report Updates for Pre-Billed WIP and Pre-Applied Progress Scenarios
The beginning WIP balance on the following reports now calculates correctly for pre-billed WIP and pre-applied progress:

- Client Ledger report
- General Ledger report
- Monthly Activity report
- PTD/RTD WIP/AR Reconciliation report

Pre-billed WIP occurs when the WIP transaction billed is dated after the invoice that it was billed on. Pre-applied progress occurs when the progress on an invoice is dated after the invoice that the progress was applied on.

WIP/AR Reconciliation Report
Expenses with 0 units are now reflected correctly in the beginning balance of the WIP/AR Reconciliation report.

WIP Corrections Report
The Transaction Staff filter now appropriately shows only transactions for that selected staff.

Return Group can be changed Client APIs
Previously, the return group field was not used when it was included in the Open Integration Platform client APIs used to add or modify clients. Now, the return group is saved when a client is created or modified.