CCH Axcess™ Practice

Welcome to CCH Axcess™ Practice 2023-5.0

This bulletin provides valuable information about the 2023-5.0 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

CCH Axcess Common

CCH Axcess SSO has been enhanced for security and to ensure IRS compliance. Users can now easily modify, add, or delete phone numbers for 2-Step Verification, offering more control over the multi-factor options. The CCH Axcess active session timeout will be shortened from 24 hours to 12 hours to align with compliance standards and safeguard user accounts.

Fixed in this Release

Administration

New values can now be added to the list of custom field values for Custom Fields — Time Entry without error.

Client Manager

The check performed prior to allowing deletion of a client now includes a check for a non-zero AR Balance thereby preventing deletion of a client whose balance is not zero.

Notifications

Notifications will no longer be generated for PTO Allowance Exceeded notifications where a staff person's balance for a particular allowance has not been exceeded.

Time Capture

The Date Last modified column in Time Capture now consistently updates with a change in transaction status.

Transactions imported through Import Transactions will correctly update the actual hours for the associated project.

Reports

Client Profile Report

The firm licensing configuration that caused the report to display "no results" has been resolved and the output will now include the intended results based on user security rights.

Report Optimization

The Accounts Receivable Aging, Client Contact List, Project Budget to Actual, and Staff Productivity Budget reports now finish successfully due to performance improvements.

Feedback Forum

CCH Axcess™ Feedback Forum — Aha!

Have an idea to improve the CCH Axcess Practice product? Click on the light bulb 💡 in the top right of CCH Axcess™ Practice Billing or CCH Axcess™ Practice Accounts Receivable. Additionally, you can click the "Feedback Forum" link in the CCH Axcess Dashboard navigation bar to get access to our idea feedback forum!

Visit Support Online for access to the helpful items such as the knowledge base or system requirements.