CCH Axcess Practice

Welcome to CCH Practice 2013-1.0

This bulletin provides important information about the 2013-1.0 release of CCH Axcess Practice. Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-877-977-9739. Additional information is available on CCH Support Online, including:

- Release Bulletins
- Your e-*fx*News Profile
- Training Videos
- Speed Tests

Please visit the CCH Axcess Application Status Web page to view in real time the current status of any of the Axcess applications. The Application Status Web page is updated every 15 minutes. You can visit this site at any time, including when support is closed.

Important Note - Action May Be Required

DNS Resolution

The maintenance completed for CCH Axcess may require an additional step for some firms, especially those on versions of Windows earlier than Windows 7. A planned DNS change may prevent you from connecting to CCH Axcess, requiring your DNS to be cleared. If you have an initial problem connecting to CCH Axcess, please do the following:

1. Open a command prompt via **Start > Run > cmd**.
2. Enter **ipconfig /flushdns**.

This will clear your saved DNS and allow you to connect to CCH Axcess. It should not affect any other programs you may run. If you have any additional issues, please contact CCH Axcess Support at 877-977-9739.

Billing Views

Client and Project Views - New Columns and Filters

For better clarity and insight into clients' WIP balances, new columns for Unbilled WIP, Progress Amounts Available (shown as a negative amount), and Net WIP provide each amount that affects the net WIP balance. You can also sort this information to help you prioritize and complete billing.

Filters for the new columns allow you to quickly find clients that meet a specific dollar threshold, and hide those clients that do not meet a specific threshold.

Accounts Receivable - More Information Pane

A new Accounts Receivable More Information Pane now displays at the bottom of your billing view. This pane contains important information to help you quickly and efficiently learn about a client's Accounts Receivable balance, last payment amount, and last payment date.

If you use a client billing group view, the More Information pane displays information for each client in the group. If you are in a client or project view, the information displays for the single client.

Access to this information can help you prioritize the clients you bill first. You do not have to open other modules and take extra steps to locate this information.

Bill Methods - Detail Bill and Quick Bill

Detail Bill Screen - Dual Monitor Friendly

The Detail Bill screen is now a non-modal screen, which allows you to open other screens in CCH Axcess while this screen remains open. You can move this screen to another monitor and access other screens, such as the Client Dashboard, that you may need to make your billing decisions.

Note: You can have one Detail Bill or Quick Bill screen open at a time. While the screen is non-modal, you cannot have multiple versions of the billing screens open.

Detail Bill - Summary Totals

The Detail Bill screen now displays summary totals at the bottom of the screen. Totals displayed include:

- Number of records selected
- Total hours for selected records
- Total WIP amount for selected records
- Progress applied totals now display as negative amounts

Additional Columns, Column Selection, and Persistence

Additional columns are available to add to your views. A Column Selection button, available in the button bar, controls the columns that display. You now have the option to add the following columns:

- Project ID
- Staff ID
- Service Code Description

These new columns provide additional detail to assist with billing decisions. These items also provide added sorting capability, which you can use to better organize WIP transactions as you review and select transactions to complete your billing decisions.

Your column selections and order persist for each subsequent client the next time you enter Billing. These settings also apply to the Rebill screen.

Bill Through Date

If you have permissions to change your Bill Through Date, you can now update the field directly from the Detail Bill and Quick Bill screens. This facilitates the billing process when pertinent WIP is missing or there is too much WIP due to an incorrect Bill Through Date. You can change the date directly on the screen, without returning to the main billing screen.

Note: If you change this date, it overrides the Bill Through Date specified in firm settings. This date persists for your CCH Axcess session and will remain until you close CCH Axcess.

Correct WIP

You can now access Correct WIP directly from the Detail Bill screen. If you are in the process of making billing decisions on the Detail Bill screen, and you realize corrections are necessary, click Correct WIP. You will be prompted to save any previous billing decision. If you click Yes, decisions are saved; if you choose no, transactions are set back to an unbilled status.

After you finish your corrections, you return to the Detail Bill screen. This saves you many clicks and provides a more efficient process of correcting transactions on the fly while billing a client.

Correct, Transfer, and Reassign WIP

Lookups - Consistent with Time Capture

Lookups for Client, Service Code, Project, and Workstep function consistently with the field in Time Capture. You can now locate items using the same search controls, no matter which module you are working in.

Transfer WIP

The Transfer WIP screen now contains an option to transfer time or transfer expenses. This provides better clarity by filtering only a specific type of transaction and reduces the risk of inadvertently transferring unintended transactions.

The Transfer WIP function no longer prompts you for a date of the transfer, ensuring that all transactions keep their original transaction date. We expect to make further changes to tracking of transfers and accounting period dates in future releases. If you have any comments or suggestions about this change, please contact our Customer Support team at 1-877-977-9739.

Correct WIP - Rate Override and Recalculate Rate

If you change the Billing Rate for a transaction, the rate now displays in red. This provides a bold, visual indicator that you changed a billing rate, and can prevent errors if this was not your intent. If you did not intend to change the rate, a new recalculate rate button is also available directly to the right of the rate field.

Update All

To provide a more intuitive and optimum user experience, we've temporarily disabled the Correct WIP - Update All feature. We expect that this feature, in its new form, will be completed in 2014.

Note: In addition to the enhancements listed in this section, we made many technical corrections to the Correct, Transfer and Reassign WIP features. If you have questions about specific items reported by your firm, please contact our Customer Support team at 1-877-977-9739.

Invoices

Invoice Labels for Total Sections - Firm and Template Level Settings

You can now change the wording of certain phrases and totals on invoices at the firm or template level. If, for example, you prefer to say Grand Total rather than Total Amount Due, you can change this wording in Firm Settings as a global change. You can also change these phrases at the template level, if you need varying wording for templates. This saves billers many clicks as they are no longer required to change each invoice.

Progress and Tax Applied Number Format

Progress applied and Progress Tax Applied now display as negative amounts, reflecting that they are reducing the overall invoice total. This saves billers many clicks as they are no longer required to change each invoice.

Client Dashboard

Clocks

When working on the Client Dashboard, you can now start, stop, and manage a clock. For example, if a customer calls, and your first step is to open the Client Dashboard for information, you can now also start a clock to begin tracking your time for that customer. Time tracking is now much easier and more efficient when working from the Client Dashboard.

WIP Pane Filters

The WIP pane on the Client Dashboard now contains filters for billing status (the current state of the transaction), and WIP type (Time, Expense, Reimbursable Expense). These filters make it quicker and easier to display the transactions you need to review.

Time Capture

Additional View Functions - Print, Export, and Find

When using views in Time Capture, you can print the transaction listing or export the information to Microsoft ® Excel for further analysis. If you are looking for specific information in the list, you can use the Find feature to locate a specific transaction.

If you have a high volume of transactions in your view, you can export transactions on all pages in the view.

Rate Override and Recalculate Rate

When entering a transaction, if you change the billing rate for the transaction, the rate now displays in red. This provides a bold, visual indicator that you changed a billing rate, and can prevent errors if this was not your intent. If you did not intend to change the rate, a new recalculate rate button is also available directly to the right of the rate field.

All Practice Modules

Client Lookup - New Lookup Options

The client lookups throughout CCH Axcess Practice now contain the option to search by both client name and client ID simultaneously. This saves you time if sometimes you search for a name, and sometimes by ID, depending on the situation.

The client list is now populated with "recently accessed" clients when opened. This new display allows you to easily locate clients you work on frequently without needing to search.

Client Manager

Client Billing Groups

You can now delete client billing groups that you no longer use. This ensures that you do not put clients in billing groups that are no longer actively used in the firm.

Reports

Quality and Performance Focus

We dedicated this release to the quality and performance of key reports. Improvements to filters, grouping, sorting, and load times were improved for the following list of reports:

- Accounts Receivable Aging
- Accounts Receivable Detail Aging
- Billing Report
- Billing Register
- Billing Worksheet by Service Code
- Billing Worksheet by Project
- Client Billing Realization
- General Ledger Reconciliation
- Monthly Activity
- Monthly Comparison
- PTD RTD WIP AR Reconciliation
- Time and Expense
- WIP AR Reconciliation
- WIP AR Aging

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Technical Corrections

Client Setup
- Client bill rate options remain at their proper setting when you create a new client and click Save and Close from the Billing Options section.
- Proper error messages display when attempting to delete a client without open transactions from a billing.
- The program selects the proper number of clients when adding new clients to a billing group.

Dashboards and Notifications
- If you change the Invoice Status filter for one client, the filter selection is retained for other clients opened from the Client Dashboard.
- Progress Tax amounts applied display on the Invoices pane.
- In the WIP pane, invoice numbers now display for transactions written off as part of a bill issued to the principal client of a billing group.
- If a transaction has been corrected multiple times, it only displays once in the WIP pane on the Client Dashboard.
- The appropriate date displays for unposted payments in the Accounts Receivable Charges pane on the Client Dashboard.
- Deleted WIP does not display in the Transaction Summary pane on the Dashboard.
- Yearly allowance exceeded warning now generates and displays appropriately on the Notification pane on the Dashboard.

Time Capture

- The appropriate bill rates are used for clients with client specific rates selected.
- CPE screen displays for staff assigned to the Time Keeper security group when entering CPE transactions.
- New state jurisdictions are available for CPE transactions.
- Missing time notifications only generate if you meet the threshold for missing time.
- Clocks now display all appropriate fields based on firm and user settings.
- When you sort a transaction view by client, the program sorts across all pages in the view.
- Your sort election for the transaction view persists after entering new transactions.
- You can look up any staff on the MTD Totals screen, even if the staff is not in the default Top 50 staff in the list.

Accounts Receivable

- You can correct transactions even if another staff updated the transaction.
- Finance Charge Register report displayed at posting now shows only the transactions posted in the batch.

Billing

- You can now use detail bill to create a $0 invoice when you have a negative WIP balance.
- When using billing fee agreements, views update after you create the invoice.
- On Quick Bill, the correct progress and progress applied amounts display when write up or down is prorated to expenses.
- On the Progress Bill screen, after entering an amount, you can press Enter and continue entering information.
- Client responsible staff assignments now update properly in billing views.
- You can now use fee agreements to bill a client, even if some billing decisions are in process and saved by another staff.

Invoices

- Invoice paragraph amounts now include commas.
- Custom file naming conventions are used when publishing invoices to CCH Axcess Document.
- If you choose to Save and Close an invoice, go back to the Detail Bill screen, and choose Save and Generate Invoice, the invoice generates.
- You can now apply progress tax to final invoices when creating a bill for a billing group.
- Email invoices only generate if the client is flagged to receive invoices via email.
- When printing a posted invoice from the Client Dashboard, the program no longer displays an error message.
- When printing an invoice that was edited by another staff, the program no longer displays an improper error message.
- Category, Subcategory, and Service Code paragraphs now display on invoices when you select a template that uses the paragraphs.
- You can now add an invoice paragraph by clicking and dragging the icon to the left of the paragraph.
- Custom field keywords placed in headers and footers now display on invoices.
- Deleted templates no longer display in the template list.

Statements

- The program only generates statement for the clients selected.
- Filters and options for generating statements based on a balance threshold now generate only those statements that meet the threshold.
- If you choose the option to exclude $0 transactions, the transactions do not appear on the statement.
- Statements now appear as PDF files attached to an email, rather than in the body of the email.

Integration

- When creating a CCH Axcess Workstream project within Practice, the program auto populates the Client lookup based on the transaction selected.
- When entering a transaction and selecting a workstep, the program auto populate the service code specified in the workstep, even if the service code is not required in the workstep setup.
- When entering time from the Dashboard or a Workstream route sheet, the service code list now displays all appropriate service codes. When you select the service code, the appropriate service code then displays in the lookup.
- "Send Invoice to Document" setting saves properly when creating a new client.