CCH Axcess™ Workstream

Welcome to CCH Axcess Workstream 2017-3.4

This bulletin provides important information about the 2017-3.4 release of CCH Axcess Workstream. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

Do Not Roll Setting

For projects that should not roll forward to next year, you now have a "Do not roll" option on the project's General Information tab. When this option is selected, the project will be skipped if it is included in a roll forward process. If the project is set to automatically roll forward, it will not be included in the Roll Forward Approver view.

Staff Access in Pool Configuration

As part of configuring pools to identify unassigned work, you can now indicate which staff are allowed to access and pull work from that pool. Qualified staff members can be identified by their office, business unit, and staff position. You can also identify specific staff members who are allowed to work in that pool. This feature reduces the number of pools staff members must select from on the dashboard pane. It also ensures that work is not pulled by staff members who are not qualified to do the work.

Fiscal Year Start

When creating projects, you now will be asked to provide the fiscal year in which the project's work started. You can also see and update this year, if needed, on the Key Tracking Dates tab in the project profile. This information will be used in the future to determine when tax form changes impact forms on tax and other projects.

Client Tax Type Criteria When Creating Projects for Multiple Clients

When selecting multiple clients on the Select Client window, you can now filter clients by their associated tax type, in addition to other existing criteria.

Dashboard Notes

- **Client and contact notes**. The new Client and Contact Notes Assigned to Me pane in Dashboard lists a summary of client and contact notes that might require your attention. Add this pane to your Dashboard to manage due dates and assignments for notes that require action. You can also use the pane to monitor the completion status of notes. Adding and editing notes has the same experience as previously released for Client Dashboard.

- **Tax return and Workstream project notes**. The Dashboard pane that lists tax return or project notes assigned to you is renamed Return and Project Notes. The content and functions of the pane are unchanged.

Note: Refer to Dashboard Help for details about configuring the layout and content of your Dashboard.

2-Step Verification (a.k.a. Multi-Factor Authentication)

2-step verification is available as an optional setting for firm administrators to configure in **Firm > Settings and Defaults > Login Setup**. 2-step verification applies to the CCH Axcess login mode and not the Active Directory or Federated Services login mode. For more information, see our article and video on administrators enabling 2-Step Verification for your firm.

Important Note: In its initial release, 2-step verification is disabled by default, and the firm must opt-in to enable the option. Based on increased security requests by the various taxing jurisdictions, in the 2017-5.0 release in November 2018, we will change the option default to be enabled, and the firm must opt-out to disable the feature.

Technical Corrections

This section contains information about issues that are resolved in this release.

Delete Workstep from Template
Under certain conditions, a workstep can now be deleted from a template, even if the workstep exists in projects:

- **Unlocked workstep** -– The workstep will not be removed from existing projects, but will be deleted from the template.

- **Locked workstep**

    o   If the workstep does not have any time or expenses entered for it, it will be deleted from open projects and the template. It will not be removed from completed projects.
    o   If the workstep has time or expenses, but all WIP has been billed, it will be deleted from the template only.
    o   If the workstep has any unbilled time or expenses entered for it, it will not be deleted.