Wolters Kluwer

Release Notes

Release 2018-4.1
July 2019

CCH Axcess™ Workstream

Welcome to CCH Axcess Workstream 2018-4.1

This bulletin provides important information about the 2018-4.1 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

New Custom Forms Date Basis Calculation of "Current Fiscal Year"
When integration with Wolters Kluwer's Research & Learning (R&L) tax calendar is enabled later this year, you will be able to select if fiscal year based due dates for custom forms should calculate **in the current fiscal year** based on the project's fiscal year start year. Currently, fiscal year based custom forms always calculate due dates in the **following** fiscal year based on the project's fiscal year start year.

Important: The option to set custom forms to the current fiscal year is available now so you can prepare these forms prior to R&L integration. However, until R&L integration is completed, custom fiscal based forms that you set to use the **current** fiscal year will calculate as **following** fiscal year. Once R&L integration is completed, these forms will calculate in the **current** fiscal year, and any existing projects using those forms will update to the correct due date as appropriate.

Reminder: Research & Learning Tax Calendar Integration
Later this year, Workstream will integrate the R&L tax calendar for form due date calculation. This calendar is an existing database used by our CCH® IntelliConnect and CCH® AnswerConnect products. With this integration, Workstream will be able to automatically update form due dates and recalculate those form due dates in projects.

- When a jurisdiction changes a due date, the R&L tax calendar date will be updated.
- Within 48 hours, the updated due date will be imported into Workstream, and projects using that form will recalculate automatically.

Workstream uses two types of forms, calendar-based and fiscal year-based forms. Due dates are calculated based on the Project's Planned Start Date and Project Start Year for calendar-based forms; the Fiscal Year field is used for fiscal year-based forms.

Important: To prepare for the R&L tax calendar integration, verify that the correct values are assigned to the following project fields:

- **Project's Planned Start Date and Project Start Year**. These fields represent the date when the project is planned to start. If a project does not have a Planned Start Date, the system uses the Project Start Year and assumes the Planned Start Date is January 1 of that year. Calendar-based forms use that value when calculating due dates.
- **Fiscal Year**. This field represents the taxable year of the work tracked in the project. It identifies which year fiscal-based forms will calculate for. For example, 1040-ES Quarterly forms calculate in the current fiscal year. 1040 forms are calculated as the 15th day of the 4th month following the fiscal year.

Recalculate Forms in Batch
The Batch Project Update utility now includes an option to recalculate the forms on projects that are being updated.

The Batch Project Update Utility can be used to update the fiscal year of projects in batches. There is no limit to the number of projects that can be updated at one time with the utility. To use the Batch Project Update utility, you must import a Microsoft® Excel® spreadsheet that identifies the Client ID, Client Sub ID, Project ID, Project Name, and Fiscal Year to assign to projects.

Known Issues

Deleting Projects
We have addressed slowness issues errors that some users experienced when deleting projects.

Forms Delete Confirmation message
You now are prompted only once to confirm a deletion when deleting multiple forms from a Forms view.

Grouped Worksteps Assignments
Grouped workstep assignments that are set by roles now update automatically when you update the assigned staff for that role.