Wolters Kluwer

Release Notes

Release 2018-5.0
November 2019

CCH Axcess Workstream

Welcome to CCH Axcess Workstream 2018-5.0

This bulletin provides important information about the 2018-5.0 release of Workstream. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

Notification About Reactivated Users
You can now choose to be notified when an existing user in CCH Axcess is reactivated. Security administrators can use this feature to monitor unauthorized user maintenance. To enable this feature, visit Dashboard > Application Links > Firm > Notifications. Detailed instructions are available in the help topic Managing Notification Conditions From Dashboard.

Last Login Date and Time
All staff members can now see the date and time that their user ID was used to log in prior to the current session. This information can help users see if someone else has used their login credentials.

Client Sort Name on Route Sheet Title Bar
You can now see the client's Sort Name on the title bar of the route sheet.

Project Notes Count Added to the Route Sheet
Within the route sheet, you can now easily identity if and how many notes are associated with a project. The project note count appears to the right of Project Notes on the menu bar.

REMINDER: Research & Learning (R&L) Tax Calendar Integration
Later this month, 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. To update all projects in a batch, please refer to the knowledge base article [How do I update the fiscal year date in all my CCH Axcess Workstream projects at one time?]

Technical Corrections

Forms Distribution when Rolling Forward Non-Annual Projects

We have addressed an issue where forms were not distributed correctly when rolling forward non-annual projects. You can now distribute forms to non-annual projects on newly rolled projects.