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Release Notes

Release 2015-4.1
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CCH Axcess™ Workstream

Welcome to CCH Axcess Workstream 2015-4.1

This bulletin provides important information about the 2015-4.1 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

My Assignments Dashboard Pane
To help you identify your current work assignments, we are pleased to introduce the **My Assignments** dashboard pane. You can configure which of your assignments are listed in this pane based on a variety of options.

You can include projects where you:

- Are assigned as the current file holder
- Act in a specific role and the project has reached a certain status
- Are assigned to the current open workstep or to the workstep with the earliest planned start date

The list can be sorted by the date when the project status was changed or when the file holder was changed. With these configuration options, you can streamline your list of assignments and focus on what you need to work on next.

When working in the My Assignments pane, you have easy access to open the route sheet, open the project, or quickly update the project status or file holder. You can also search the Assignments pane if you need to locate a specific client or project. When you finish the work, you can quickly mark the workstep or project complete.

Take Action from the Pools
From the Project Pools pane, you can now open the route sheet or the project profile so you can review detailed information about the project. This additional information can help you determine if you should assign yourself to the work. You can also quickly update the project status or file holder from the Project Pools pane, reducing the number of clicks and time necessary to update the project.

The Project Pools pane also can be temporarily sorted on a variety of fields to help you locate work by criteria such as priority or complexity. Once the dashboard is closed, it will default back to first in-first out order based on the status change date. You can also search the Pools pane to locate a specific client or project.

Assign File Holder to Role
When marking a workstep complete, you can indicate that the next file holder should be whomever is assigned to a particular role. This helps you assign the right file holder and get the project to the next person, even if you do not know the specific staff assigned to a role.

New Notifications for File Holder and Role Assignments
You can now add a notification when the file holder or a role assignment changes on a project. The system sends a File Holder update notification to the new file holder to inform the assigned individual that the project is ready for their input.

You can also add a notification when a role assignment changes from one staff to a different staff. A notification is sent to the new assignee to inform the individual of their new responsibility. Further, the system also notifies the previously assigned staff they are no longer responsible for that project.

To add either of these notifications to a specific project, select the Notifications section of the Edit Project screen. To have it added automatically to new projects, add the notification to your templates.

Get Support Link
You can now get additional product support from within Workstream. You can submit a support request, chat with one of our Service Excellence personnel, access Hot Topics, and read FAQs by clicking the Get Support link in the bottom right corner of the window. This feature can save you time by providing direct access to Service Excellence support.

Filing Method Added to Forms
To support better tracking of filing requirements, you can now track the filing method for each form in your projects. The forms tab in both projects and templates now provides an option to select the filing method for the form. You can select whether each form should be submitted electronically or on paper. You can also add the Filing Method column to route sheets and form views in Workstream.

New Forms Available
Ten new forms have been added to the CCH Forms Library. You can add the following to your firm library and to any applicable projects:

- 1042 - Annual Withholding for US Income for Foreign Persons
- CA 199 - California Exempt Organization Return
- DE 300 - Delaware Partnership Return
- IL 1000S - Illinois Pass Through Entity Payment Return for S Corps
- IL 1000P - Illinois Pass Through Entity Payment Return for Partnerships
- KS AR - Kansas Annual Report
- MD 505 - Maryland Non-resident Return
- MN M4 - Minnesota Corporate Franchise Tax
- OK 200 - Oklahoma Annual Franchise Tax
- SC 1040 - South Carolina Individual Return

Technical Corrections

This section contains information about technical corrections made in this release.

Views
- Assigning worksteps using the keyword "current user" now functions properly after importing a view.
- A project filter no longer reverts to "All" after subsequently including a client filter.

Notifications
- You can now use Update Multiple-All Selected to add a recipient to a notification.
- An error no longer occurs when a notification based on project completion is set to a role but the role is unassigned.

Roll Forward
When using the option to use workstep actuals in roll forward, the budget for the new project is now correctly calculated.