

CCH Access™ Workflow 2021-2.1 Quick Reference

Introducing CCH Access Workflow

In January 2022 (2022-2.1), XCMworkflow™ will become CCH Access Workflow. More than just a name change, this update will merge XCMworkflow into the CCH Access platform, adding more integration and incorporating new and innovative features.

This document describes the new features all firms will be provided with this release.

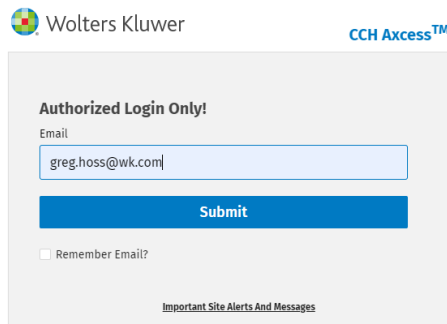
Reminder: For this release, the CCH Access Integration is available to firms opting in by contacting their Sales Representative. Once enabled, the Integration Dashboard is available to the contact admin to start the integration. Other than the following items, the functionality of the application remains unchanged.

Enhanced login experience

Firms that do not plan to integrate with CCH Access will continue to use XCMworkflow credentials to login to CCH Access Workflow.

Note: Firms using SSO will not be impacted with the new login screens.

1. An updated login screen will prompt the user for their email address:



Wolters Kluwer CCH Access™

Authorized Login Only!

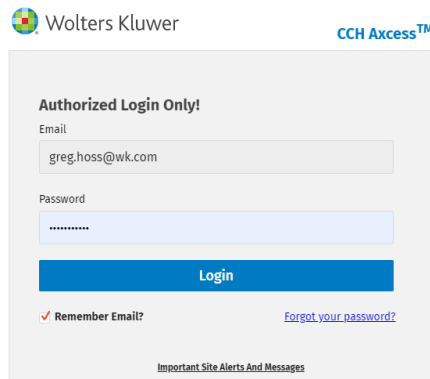
Email

Submit

Remember Email?

[Important Site Alerts And Messages](#)

2. Upon clicking submit, the user will be prompted to enter their existing credentials (OR redirected to the CCH Access login screen if the firm has elected to use the CCH Access integrations and the user has been linked). In this example, we are going through the login process of a user from a firm that has elected to not use the CCH Access integrations.



Wolters Kluwer CCH Access™

Authorized Login Only!

Email

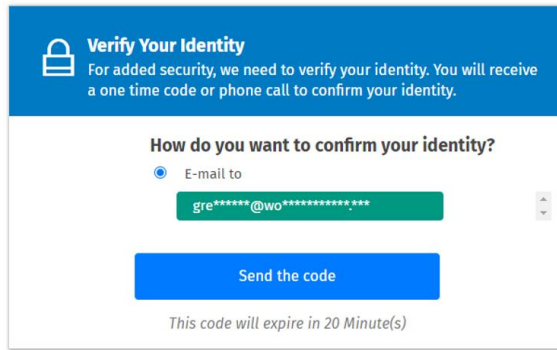
Password

Login

Remember Email? [Forgot your password?](#)

[Important Site Alerts And Messages](#)

- 2-Step Verification is required for all firms with the CCH Access Workflow 2021-2.1 release. 2-Step Verification will prompt the user to **Send the code** to their email address, as configured within their user profile. Click **Send the code** to receive the one-time passcode. The passcode is sent to the email address that is displayed on this page



Verify Your Identity
For added security, we need to verify your identity. You will receive a one time code or phone call to confirm your identity.

How do you want to confirm your identity?

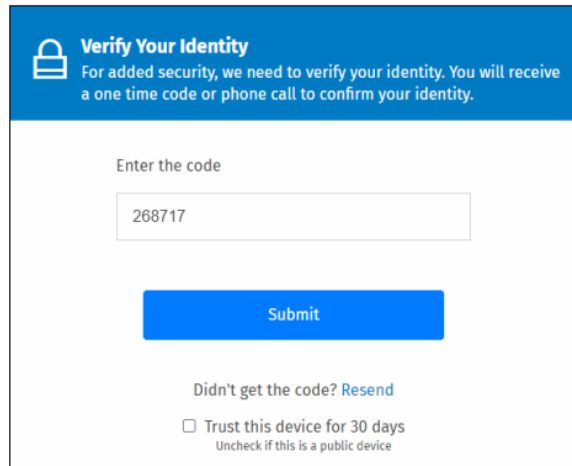
E-mail to

gre*****@wo*****

Send the code

This code will expire in 20 Minute(s)

- Enter the passcode to verify your identity and click **Submit**.



Verify Your Identity
For added security, we need to verify your identity. You will receive a one time code or phone call to confirm your identity.

Enter the code

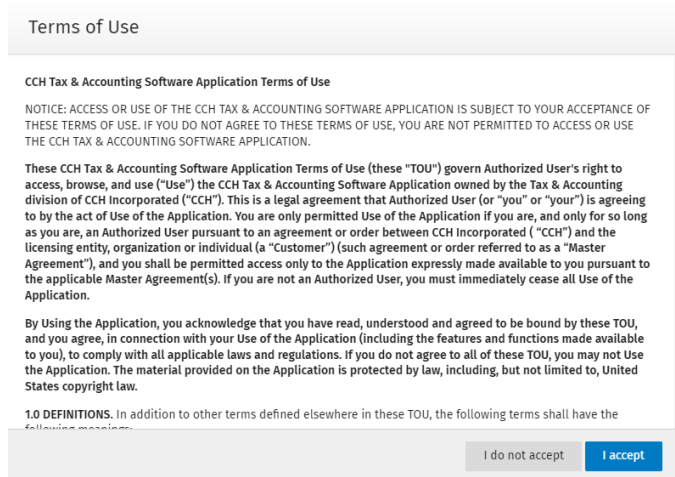
268717

Submit

Didn't get the code? [Resend](#)

Trust this device for 30 days
Uncheck if this is a public device

- After successful verification, if Terms of Use have not yet been accepted the user will be prompted to review and act:



Terms of Use

CCH Tax & Accounting Software Application Terms of Use

NOTICE: ACCESS OR USE OF THE CCH TAX & ACCOUNTING SOFTWARE APPLICATION IS SUBJECT TO YOUR ACCEPTANCE OF THESE TERMS OF USE. IF YOU DO NOT AGREE TO THESE TERMS OF USE, YOU ARE NOT PERMITTED TO ACCESS OR USE THE CCH TAX & ACCOUNTING SOFTWARE APPLICATION.

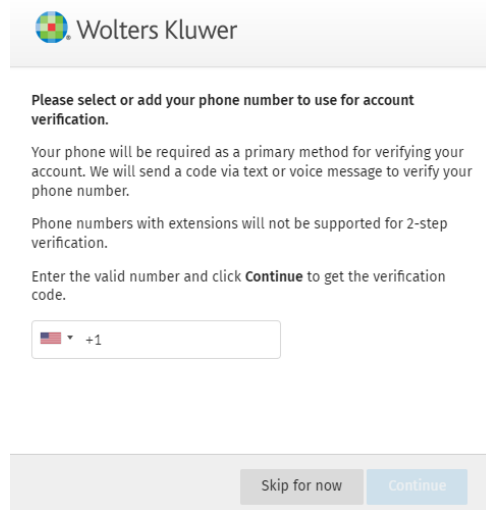
These CCH Tax & Accounting Software Application Terms of Use (these "TOU") govern Authorized User's right to access, browse, and use ("Use") the CCH Tax & Accounting Software Application owned by the Tax & Accounting division of CCH Incorporated ("CCH"). This is a legal agreement that Authorized User (or "you" or "your") is agreeing to by the act of Use of the Application. You are only permitted Use of the Application if you are, and only for so long as you are, an Authorized User pursuant to an agreement or order between CCH Incorporated ("CCH") and the licensing entity, organization or individual (a "Customer") (such agreement or order referred to as a "Master Agreement"), and you shall be permitted access only to the Application expressly made available to you pursuant to the applicable Master Agreement(s). If you are not an Authorized User, you must immediately cease all Use of the Application.


By Using the Application, you acknowledge that you have read, understood and agreed to be bound by these TOU, and you agree, in connection with your Use of the Application (including the features and functions made available to you), to comply with all applicable laws and regulations. If you do not agree to all of these TOU, you may not Use the Application. The material provided on the Application is protected by law, including, but not limited to, United States copyright law.

1.0 DEFINITIONS. In addition to other terms defined elsewhere in these TOU, the following terms shall have the following meanings:

Updating Phone Numbers for 2-Step Verification

In a subsequent CCH Access Workflow release, 2-Step Verification will require passcodes to be sent via phone number per IRS guidelines. To assist firms with preparing for this requirement, users will be prompted to enter a phone number to verify for when that requirement is implemented.




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Please select or add your phone number to use for account verification.

Your phone will be required as a primary method for verifying your account. We will send a code via text or voice message to verify your phone number.

Phone numbers with extensions will not be supported for 2-step verification.

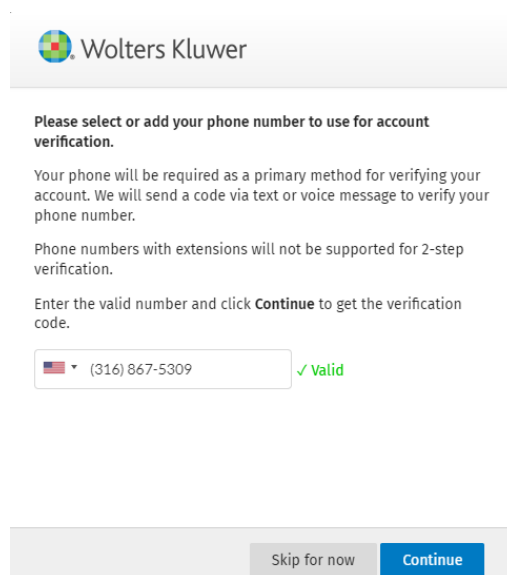
Enter the valid number and click **Continue** to get the verification code.


 +1

Users can either verify the phone number by selecting the valid number or entering their number and clicking **Continue** or click **Skip for now** to continue the login process.

If users **Skip for now**, the system will continue the login process and the user will be prompted on subsequent logins until the phone number is verified.

To verify the number, enter a valid number or select the existing number and click **Continue**.




 Wolters Kluwer

Please select or add your phone number to use for account verification.


Your phone will be required as a primary method for verifying your account. We will send a code via text or voice message to verify your phone number.

Phone numbers with extensions will not be supported for 2-step verification.

Enter the valid number and click **Continue** to get the verification code.

 (316) 867-5309 ✓ Valid

User will then be prompted to send the code to the number that was validated in the prior screen.

 **Verify Your Identity**
 For added security, we need to verify your identity. You will receive a one time code or phone call to confirm your identity.

How do you want to confirm your identity?

Text message to

Message and data rates may apply


1 ***-***-**09

Voice message to

Send the code

This code will expire in 10 Minute(s)

Enter and submit the passcode.

 **Verify Your Identity**
 For added security, we need to verify your identity. You will receive a one time code or phone call to confirm your identity.

Enter the code

604084

Submit

Didn't get the code? [Resend](#)

Trust this device for 30 days
Uncheck if this is a public device

The user's login process is then completed, as they are directed to their default view.

Wolters Kluwer Search here... XCM ProdMgmt - Sarah Co... Hoss, Greg

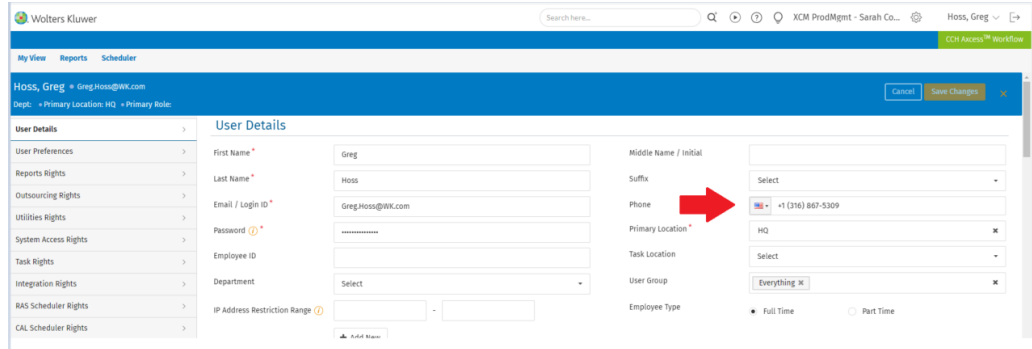
My View Reports Scheduler CCH Access™ Workflow

My Tasks (36) Views

TASKS ASSIGNED TO ME - 36 of 36 + ADD TASK

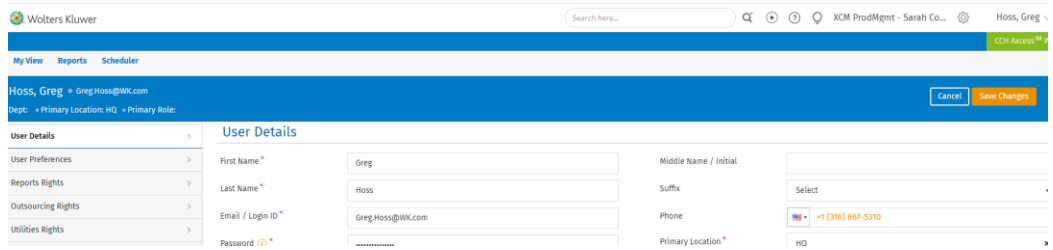
Filter View	Client/Entity	Number	Type	PED	Cat.	Desc	Status	Start Date	Due Date	Last Chg	ADD	Who H...	Ext	Who H... Ori
Current Status	1 <input type="checkbox"/> Elite Travel	10000	1120	03/15/21	TX	To Be Scanned	12/13/21	07/15/21	12/13/21 05:37:42		GH	HQ		HQ
Preparation	2 <input type="checkbox"/> Sam, Omega	1040	1120	12/30/21	TX	To Be Scanned	12/13/21	04/15/22	12/13/21 05:37:49		GH	HQ		HQ
To Be Scanned	3 <input type="checkbox"/> Arts Inc	1120	12/31/21	TX	To Be Scanned	12/13/21	04/15/22	12/13/21 05:37:46			GH	HQ		HQ
Originating Location	4 <input type="checkbox"/> Ambrose, Peggy	1040	12/31/21	TX	To Be Scanned	12/13/21	04/15/22	12/13/21 05:37:46			GH	HQ		HQ
	5 <input type="checkbox"/> Ansley, Ben	1040	12/31/21	TX	To Be Scanned	12/13/21	04/15/22	12/13/21 05:37:46			GH	HQ		HQ
	6 <input type="checkbox"/> Baker, Wayne	1040	12/31/21	TX	To Be Scanned	12/13/21	04/15/22	12/13/21 05:37:46			GH	HQ		HQ
Category	7 <input type="checkbox"/> Bennet, Mike	1040	12/31/21	TX	To Be Scanned	12/13/21	04/15/22	12/13/21 05:37:46			GH	HQ		HQ

Additionally, the User profile will be updated with the phone number that was verified:

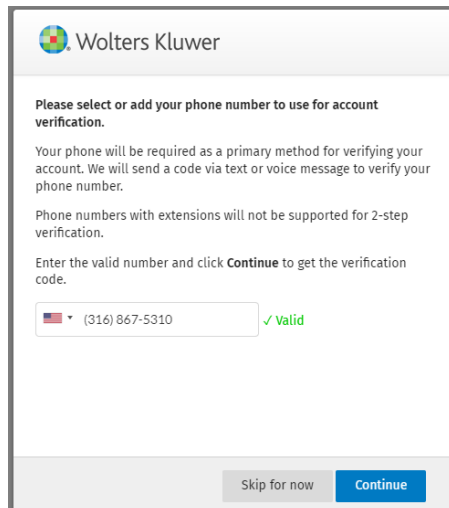


Upon successful validation the user will no longer be prompted to verify the phone number UNLESS the phone number is changed within the User profile. On the subsequent login after a phone number change, the user will be asked to verify the new number.

User profile phone number updated:



Subsequent login attempt prompting user to validate new number:



Note: Some firms may wish to remove the ability for users to 'Skip for now' to ensure all users have input their phone number prior to the CCH Axxess Workflow requiring it. We can remove the ability to 'Skip for now' and firms can contact support to make that request.

New Updated Look and Feel

XCMWorkflow has officially merged with CCH Access and is now CCH Access Workflow! Along with an updated name, we are excited to introduce an updated look and feel to CCH Access Workflow. While the fresh look provides the consistent and familiar WK styling of our other Access products, the existing core functionality of the product has not changed. With this release and subsequent releases, we will deliver improvements to the integration with CCH Access and combine key Access features with CCH Access Workflow.

Views

Client/Entity	Number	Type	PED	Cat.	Desc	Status	Start Date	Due Date	Last Chg	ADD	Who H...Ext	Who H...Ori	Curr	PTS	CKI	DTL	P	D	Preparer B
<input type="checkbox"/> Marsh, Glenn	300574.001	104-0	12/31/20	TX	Preparation		03/10/21	05/17/21	12/13/21 05:59:20		GH	BOS	DAL	0/0	9/9	D			0.00
<input type="checkbox"/> Daniels, Jeff	200116.001	1040-ES	12/31/20	TX	Preparation		05/10/21	06/15/21	12/13/21 05:59:50		GH	BOS	DAL	0/0	0/0	D			0.00
<input type="checkbox"/> Murray Motors	300252.001	EB-AUD	12/31/20	AA	Delivery to Client		05/25/21		12/13/21 06:00:15	07/30/21	GH	BOS	DAL	0/0	9/9	D			0.00
<input type="checkbox"/> Customer Construction	000900.0	AUD	12/31/20	FS	Planning		06/01/21		11/24/21 12:57:26		GH	BOS	DAL	0/0	19/19	D			0.00
<input type="checkbox"/> Yamato	280344.0	CAS	05/31/21	BL	Review		06/01/21		11/24/21 12:57:43		GH	BOS	DAL	0/0	15/15	D			0.00
<input type="checkbox"/> Caster Construction	003003.0	1120	12/31/21	TR	Customer Preparation		12/13/21	04/15/22	12/13/21 09:57:00		GH	BOS	DAL	0/0	11/11	D			0.00

Utilities

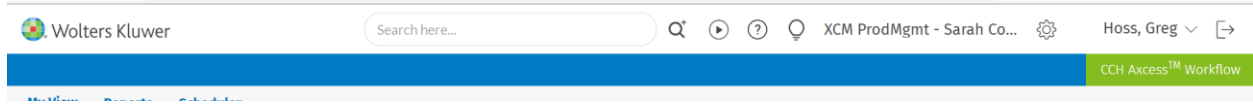
Utility Category	Description
User Utilities	
Manage Users	Add/edit User accounts, assign User rights, reset passwords, and configure My View defaults.
Manage Staffing Assignments	Find/replace staffing assignments in bulk at the Client/Entity or Task level.
Change Password	Change the currently logged on User's password.
Bulk Manage User Groups and User Rights	Bulk Manage User Groups and User Rights.
Client/Entity/Group Utilities	
Manage Clients/Entities	Add/edit Client/Entity information and change settings in bulk, including primary Task type, Client/Entity type, location, and group membership.
Manage Groups	Organize Clients/Entities into Groups to enhance searches and administration.
Task Utilities	
Create New Tasks	Create new Tasks in bulk.
Rollover Tasks	Use this utility to roll forward existing tasks in bulk.
Manage Recurring Tasks	Automate Task creation through a flexible scheduler interface and define the assigned responsible person.

Reports

Report Category	Description
User Reports	
Issues & Points - Open	Shows only open Issues & Points needing resolution.
Issues & Points - All	Displays all open and closed Issues & Points.
Checklist Status	Sorted by Task, shows all open and closed Checklist items.
Checklist Details	Sorted by Client/Entity and Task, shows all open and closed Checklist items. Enables tracking the Checklist status across all clients/entities and tasks.
My Clients/Entities - Tasks	Displays the currently logged on User's assigned tasks, sorted by Client/Entity.
Tasks I Moved	Within the selected date range, shows all Tasks moved by the currently logged on User.
Due Date Reports	
Summary	At the Task level, displays each Task's current due date.
By Deliverables	For each Deliverable within a Task, shows the current due date.
Extension	Displays all tasks with all extension due dates at deliverable level.
By Deliverables - Distributable Format	For each Deliverable within a Task, shows the current due date. Also, the data is for each person in a separate XL sheet when you download it to XL.
Summary - Distributable Format	For each Task, shows the current due date. Also, the data is for each person in a separate XL sheet when you download it to XL.
Billing - Due Date Summary with Deliverable Count	At the Task level, displays each Task's current due date with deliverables count.
Task Detail Reports	
eFile Status	Provides information about Tasks moving through the eFile process for easy reference and monitoring.

New Icons

We've added a few new icons in our updated header, as well!



Log off:



Idea Forum:



Links to our Ideas Forum. Submit ideas and feature requests for consideration on the product roadmap. We want to hear what our users need and why they need it, so that we can improve the user experience with our software solutions.

Help:



Links to our support site allowing users to view our comprehensive online resources such as searching our extensive Knowledge Base for

Video Tutorials:



Links to our Video Library showing the Hot Topics videos.