CCH Axcess™ Workflow 2021-2.1 Quick Reference

Introducing CCH Axcess Workflow

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

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

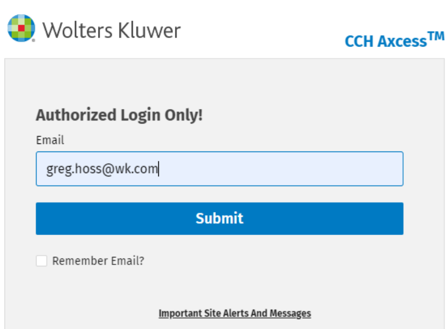
Reminder: For this release, the CCH Axcess Integration is available to firms opting in by contacting their Sales Representative. Once enabled, the Integration Dashboard is available to the contact admin to start the integration. Other than the following items, the functionality of the application remains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

Enhanced login experience

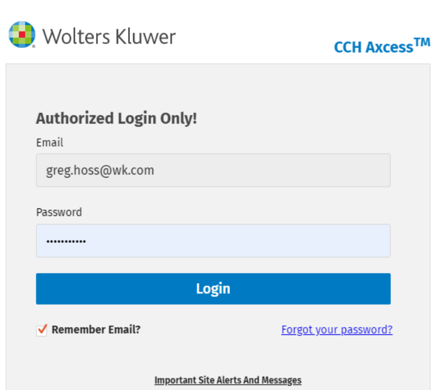
Firms that do not plan to integrate with CCH Axcess will continue to use XCMworkflow credentials to login to CCH Axcess Workflow.

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

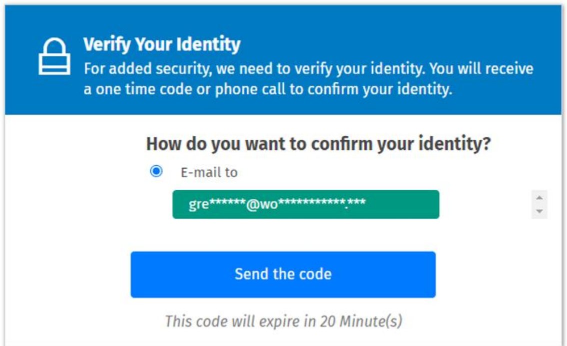
1. An updated login screen will prompt the user for their email address:



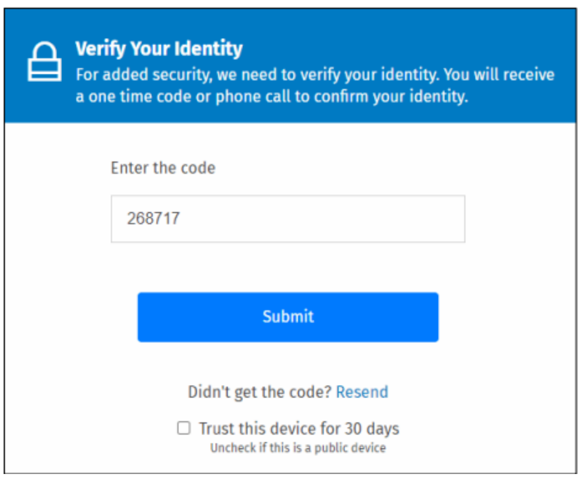
2. Upon clicking submit, the user will be prompted to enter their existing credentials (OR redirected to the CCH Axcess login screen if the firm has elected to use the CCH Axcess integrations and the user has been linked). In this example, we are going through the login process of a user from a firm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



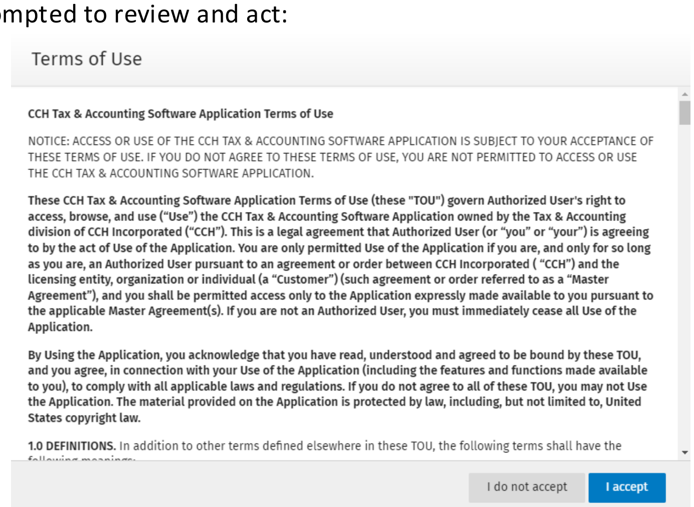
3. 2-Step Verification is required for all firms with the CCH Axcess Workflow 2021-2.1 release. 2-Step Verification will prompt the user to **Send the code** to their email address, as configured within their user profile. Click **Send the code** to receive the one-time passcode. The passcode is sent to the email address that is displayed on this page



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

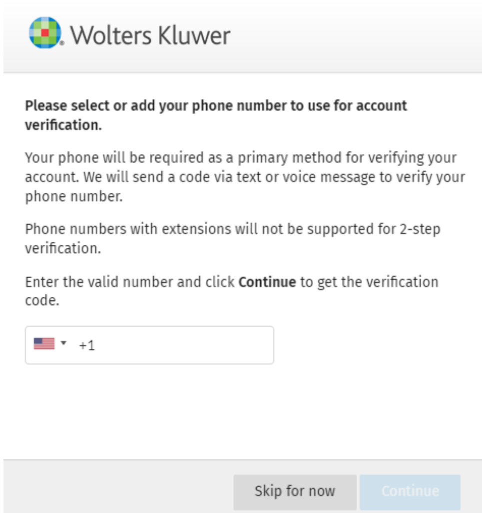


5. After successful verification, if Terms of Use have not yet been accepted the user will be prompted to review and act:



Updating Phone Numbers for 2-Step Verification

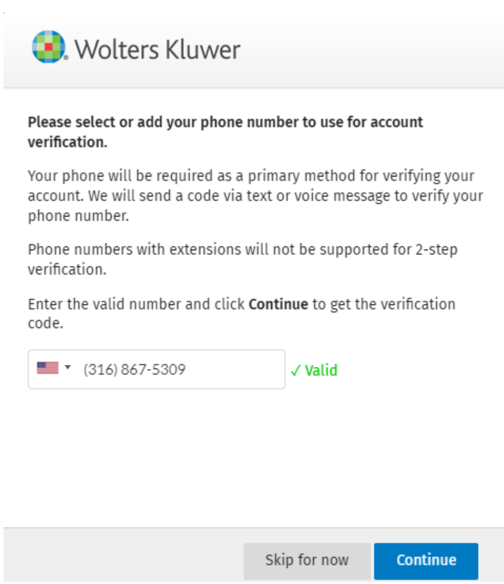
In a subsequent CCH Axcess Workflow release, 2-Step Verification will require passcodes to be sent via phone number per IRS guidelines. To assist firms with preparing for this requirement, users will be prompted to enter a phone number to verify for when that requirement is implemented.



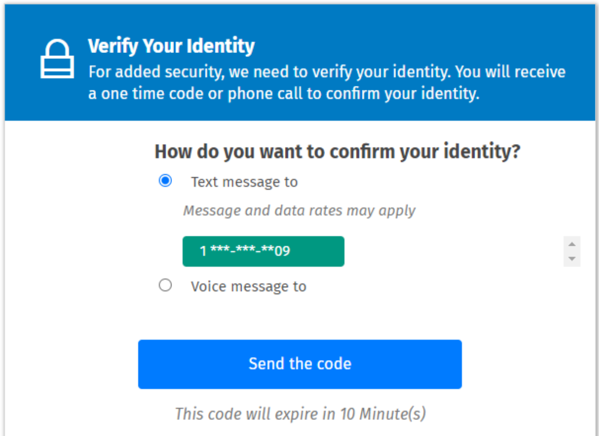
Users can either verify the phone number by selecting the valid number or entering their number and clicking **Continue** or click **Skip for now** to continue the login process.

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.

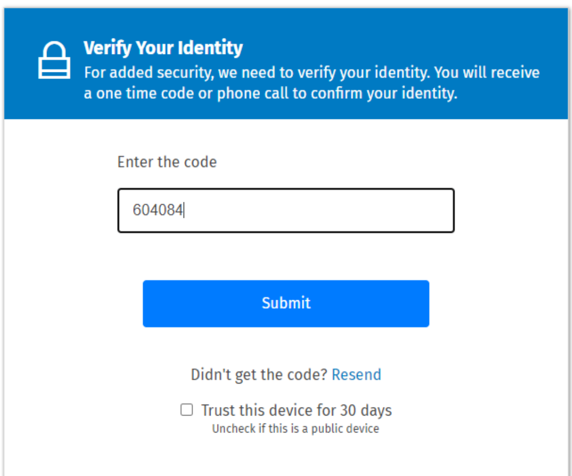
To verify the number, enter a valid number or select the existing number and click **Continue**.



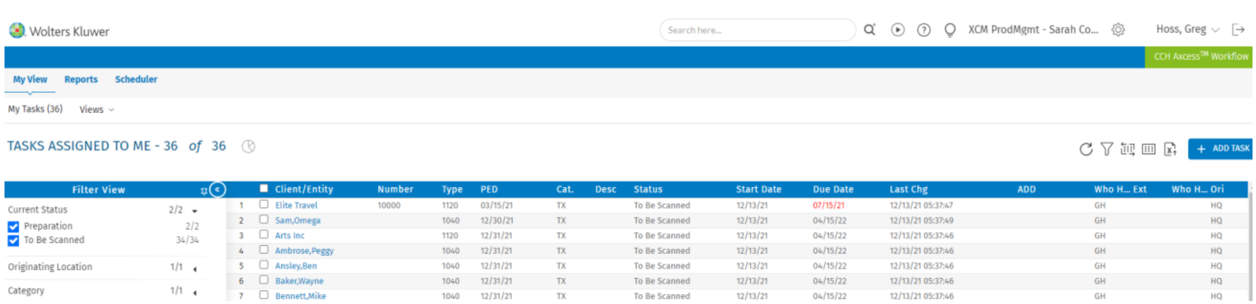
User will then be prompted to send the code to the number that was validated in the prior screen.



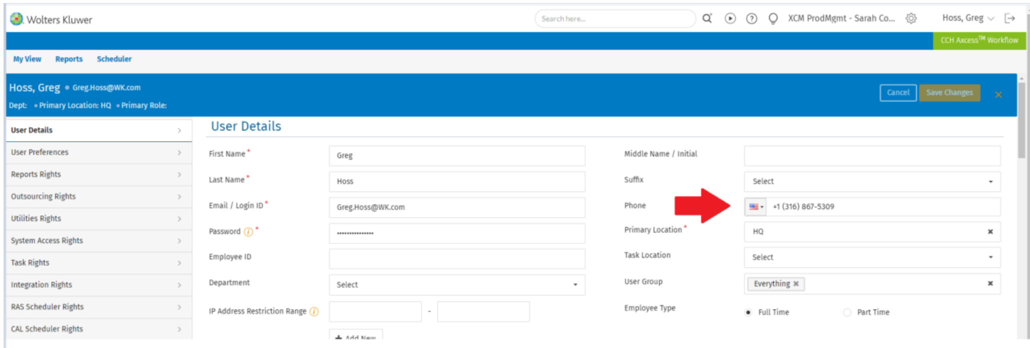
Enter and submit the passcode.



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

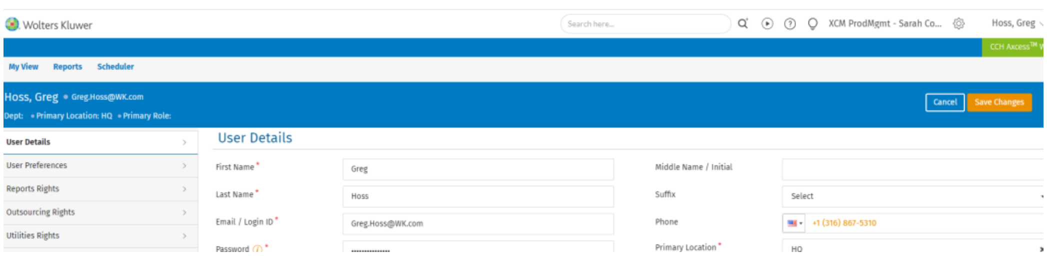


Additionally, the User profile will be updated with the phone number that was verified:

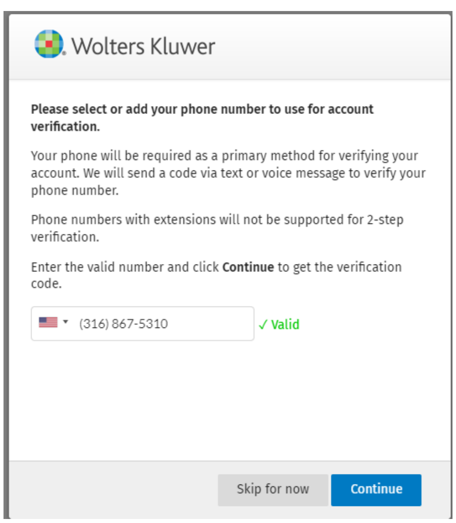


Upon successful validation the user will no longer be prompted to verify the phone number UNLESS the phone number is changed within the User profile. On the subsequent login after a phone number change, the user will be asked to verify the new number.

User profile phone number updated:



Subsequent login attempt prompting user to validate new number:

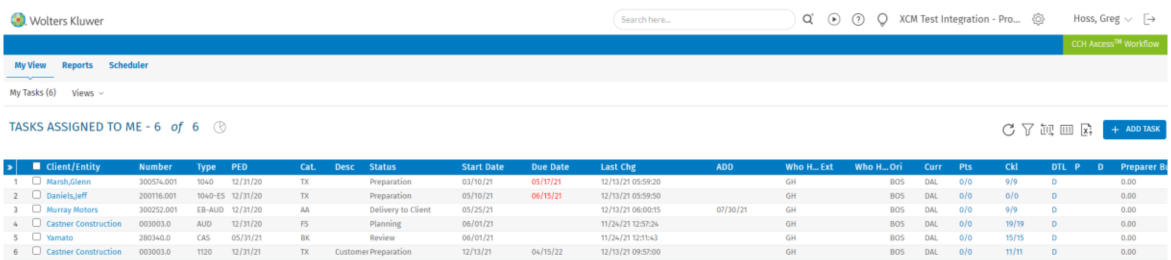


Note: Some firms may wish to remove the ability for users to 'Skip for now' to ensure all users have input their phone number prior to the CCH Axcess Workflow requiring it. We can remove the ability to 'Skip for now' and firms can contact support to make that request.

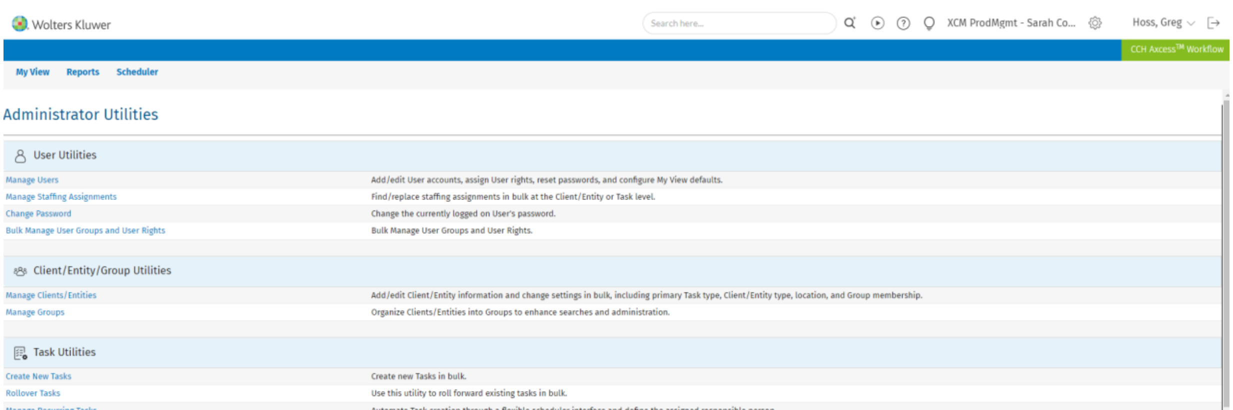
New Updated Look and Feel

XCMWorkflow has officially merged with CCH Axcess and is now CCH Axcess Workflow! Along with an updated name, we are excited to introduce an updated look and feel to CCH Axcess Workflow. While the fresh look provides the consistent and familiar WK styling of our other Axcess 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 Axcess and combine key Axcess features with CCH Axcess Workflow.

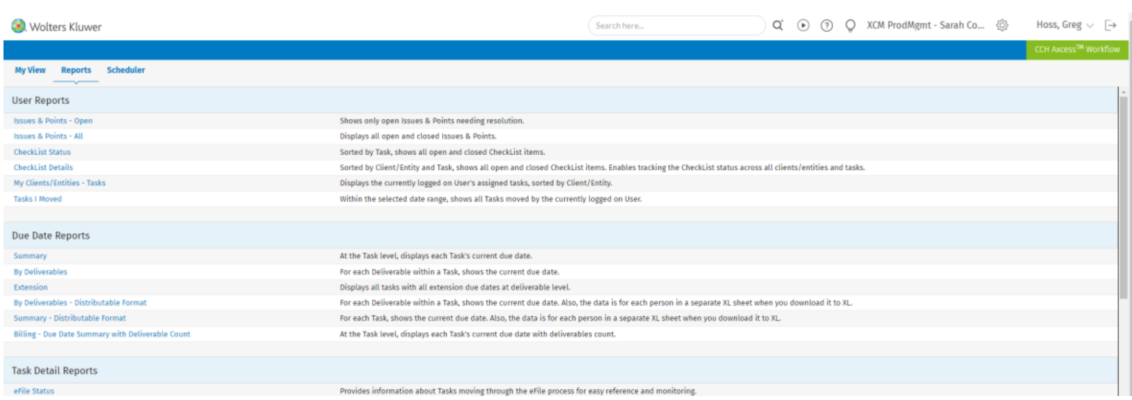
Views



Utilities

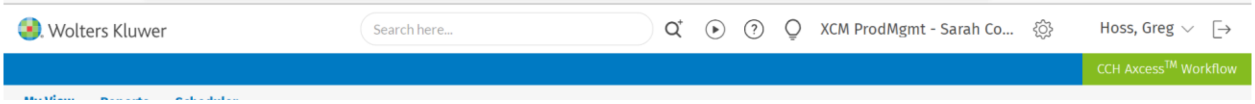


Reports

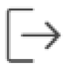


New Icons

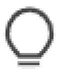
We've added a few new icons in our updated header, as well!



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.