What’s New for “My Account”

Over the next couple of years, Wolters Kluwer is updating our systems for our Tax & Accounting Software customers in a phased approach, to improve your experience.

What’s new:

1. When you renew your Specialty (non-Tax) products, your 6-digit account number for that product will be migrated over to a 10-digit account number. You will be notified of your new or updated account number.

2. “My Account” will give you a one-time notification.

3. You might be associated with multiple accounts if you have both Tax and non-Tax products from us.

4. As accounts are renewed and get migrated, you will be notified again for each of the migrated accounts. So, you will need to register to log into your account to see your account information.

5. “My Account” is the support portal that all customers can utilize to manage your account. In your “My Account”, as your accounts are migrated, you will have the option to bill pay and view online statements.

* A “My Account” user might be associated with multiple account numbers if you have Tax and non-Tax products.

Current My Account Options

- **Change my address** — Same functionality for both Software and Research & Learning.
- **View my inventory** — Same functionality for both Software and Research & Learning.
- **View my invoice/billing statement** — Redirects to CCHGroup.com site. SSO needed to login.
- **Access my permission key or unlock codes** — Only for Software Accounts (6 digit).
- **Order tax mailing envelopes and supplies** — Only for Software Accounts (6 digit).
New My Account Options

- **Change my address** — Same functionality for both Software and Research & Learning.
- **View my inventory** — Same functionality for both Software and Research & Learning.
- **View my invoice/billing statement** — Opens up SAP invoices on the support site.
- **Check my order status** — Check order status for Research & Learning orders only.
- **Make a payment** — Make a payment for SAP Accounts only.
- **Request report replacement** — Report request for Research & Learning only.
- **Return a publication** — Return a Research & Learning order only.
- **Review my standing orders** — Review a Research & Learning order only.
- **Access my permission key or unlock codes** — Only for Software Accounts (6 digit).
- **Update mailing schedule** — Updated mailing schedule — Research & Learning only.

Steps for Upgrading Customer Accounts

You may pay your bills via phone, by remitting payment, or by faxing in your payment information.

If you have never logged into the Support website, you’ll need to register for a new login ID/password. Or, if you have forgotten your password, simply click on the corresponding link on the Support site.

There are many ways to log into “My Account”. No matter which way you log in, you will see a pop-up screen directing you to view the “My Account” new features and new videos. You will need to click “here” for the pop-up to go away.
Click on the “My Account” button.

On the Manage Accounts page and as your non-Tax solutions reach their renewal dates, a green arrow button, under the upgrade column will appear. Each migrated (10 digit) account will need to be upgraded from a basic (10 digit) account to a full account (10 digit) to take advantage of all of “My Account’s” new features such as, online bill pay.

Note: You will need your old account number or order number to enter into a pop-up verification box to be able to pay your bill.

Only migrated and upgraded, full accounts will be able to pay online or use other new “My Account” features.
When the you press the green up arrow, you will receive a pop-up as shown to the left. You will need to have an invoice number or an order number to pay your account online.

How to Get to “My Account” FAQs

- Log into Support.CCH.com

- Access the “My Account: Frequently Asked Questions” article at: https://Support.CCH.com/kb/solution.aspx/rp367

If you have any questions, please call us at 800-739-9998, option 2, option 1, option 1 or visit Support.CCH.com.