

Tax & Accounting

CCH Axcess™ Client Collaboration vs. the Competition

Features & Benefits for Firms/Staff

Features & Benefits	CCH Axcess Client Collaboration	Competition
Supported Client Types		
End-to-end collaboration with Clients on 1040 Individual Tax Returns	✓	✓
End-to-end collaboration with Clients on Corporation, Partnership, Employee Plan, Non-Profit and Fiduciary Tax Returns	✓	✗
Engagement Letters and Organizers		
Reusable, customizable templates for Engagement Letters, Questionnaires and Document Request Lists, based on Client Type	✓	✗
Send Personalized Engagement Letters that pull information from the client profile, based on Client Type	✓	✗
Send Engagement Letters, Organizers and Document Request List in a single step	✓	✗
Customize a single Engagement Letter for a client while creating the request	✓	✗
Personalized tax organizer with prior year information extracted from CCH Axcess™ Tax (automatic)	✓	✗
Client Collaboration Workflow		
Year-round portal for data gathering and sharing	✓	✗
Send Personalized Engagement Letters that pull information from the client profile, based on Client Type	✓	✗
Flexible workflow statuses allows the firm to start the work early (before the client indicates they are done)	✓	✗
Easily track documents received after tax return preparation has started (missing documents)	✓	✗
A Single Client Collaboration Platform to learn/use for all tax client work	✓	✗
Automated Due Date reminders sent to clients so firms don't have to	✓	✗
Tax Return Delivery and 8879		
Send 1040 return for client review and 8879 e-signature and upload to electronic filing system in a single step	✓	✗
Tight integration with electronic filing system - updated automatically as signatures are received	✓	✗
CCH Axcess Platform Integration		
2 Way Sync between the collaboration platform and CCH Axcess™ client profile data	✓	✗
Leverage firm configuration settings (as filters) and client access groups from CCH Axcess without duplicating efforts	✓	✗
One common area to set up user permissions/rights within CCH Axcess	✓	✗
Other Features/Benefits		
Add your firm's custom logo to the log in screen, client dashboard, emails, and engagement letters	✓	—

Features & Benefits for Clients

Features & Benefits	CCH Axxess Client Collaboration	Competition
Login and Access		
Clients have one set of log in credentials and a single platform to learn/use for all their tax returns	✓	✗
Clients' User ID can be tied to as many requests as needed and easily switch between 1040 and business return request(s)	✓	✗
Engagement Letters and Organizers		
Clients can review and electronically sign engagement letters tied to their personal and business return requests	✓	✗
1040 questionnaire is simplified vs. paper organizer questionnaire and clients only answer questions applicable to them	✓	✗
For 1040 business schedules (C, E, and F), clients can see prior year amounts and enter in current year amounts (not just a fillable PDF), or attach documentation instead	✓	✗
Client Experience		
Same client experience regardless of return type (individual, corporation, partnership, etc.)	✓	✗
Integrated eSign and Tax Return Delivery experience for 1040 returns	✓	✓
Tax return delivery for business returns	✓	✗
Automatic retrieval of W2s, 1099s, brokerage statements, etc. using financial connections	✓	✓
Year-round portal area for data gathering and sharing any time of year, not just at tax time	✓	✗
Client Self-Help		
In-app guidance/walkthroughs and tutorial videos for firm users and clients	✓	✗