CCH Axcess™ Client Collaboration Quick Reference Information

Welcome to Client Collaboration

Tasks Lists

To get started, click on “Get Started” or “Go to my tasks” from your home page. Your Tasks will step you through the required items we need you to complete.

Signing the Engagement Letter

Signing your engagement letter will be the first task on your task list. When you click the “Sign” link, your browser will be directed to a secure partner site to facilitate the electronic signature.

The links at the top of the screen will navigate you through this simple process. After the Welcome step, you will need to Agree to Terms, Sign (by selecting a signature style) and Finish before you are returned to your Tasks in the collaboration hub.

Filling out the Tax Questionnaire

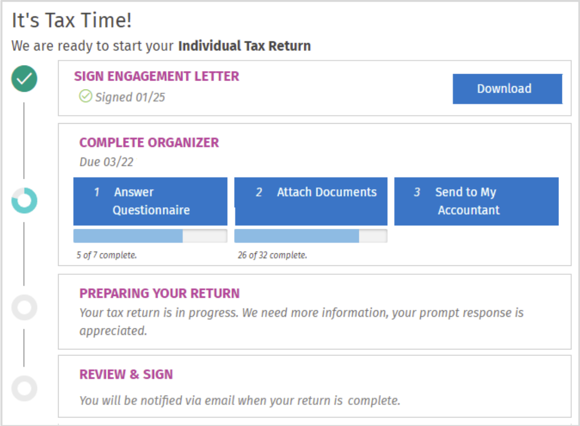
One of the benefits of our digital collaboration hub is that it is easy to use and focuses on only the relevant information that affects your tax return.

Whether you complete your Questionnaire all at once or a little bit at a time, the collaboration hub will track your progress so you know exactly where you are in the process.

Completing the Personal Information

Review the information we have on file; click on “Edit” to make any necessary changes.

TIP: Toggling the “Done” switch at the bottom of each page will help you track if you need to return to it, for instance if you are completing the Dependents section but do not have the necessary details, leaving the toggle set to “No” will remind you return to it later.



TIP: The circles will display your progress and will move towards completion in a clockwise direction for a specific step. When a step is fully complete, the progress circle will be replaced with a checkmark.

TIP: For jointly filed returns, it may be necessary for both parties to sign the engagement letter before that step is fully complete.

TIP: You don’t necessarily need to wait until you have 100% of the requested information to submit your organizer, but we do recommend you complete as much as possible before selecting “Send to My Accountant”.

For more help using the collaboration hub, you can access the full list of quick explainer videos.

Personal Information>Step 4 Taxable Events

Your responses on the Taxable Events page will drive the remaining questions we need you to answer based upon your life changing events you experienced.

Questionnaire Home

After completing the initial 4 steps in the Personal Information section, your responses to the taxable events created tiles with additional questions categorized for you. Your answers to these questions may drive additional items being added to your Document Request List to remind you to send us your new data.

TIP: Tiles in the white area on the Questionnaire Home represent the taxable events you indicated affected your tax year, while tiles in the gray area represent the taxable events you indicated did not affect your tax year activities. Complete those tiles in the white area.

TIP: If you need a category (tile) in the gray area, click on it change the answer to the first question to “Yes”, and it will unlock the remainder of the page for you to complete.

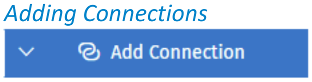
Completing the Document Request List

The Document Request List is generated based on the information you provided last year, as well as any new information provided in the Questionnaire.

Attaching Documents

You can attach documents by using the Upload button or by dragging and dropping files from your file browser. As you attach documents to each requested item, that item will be checked off as complete. You can also view and delete the files from this screen.

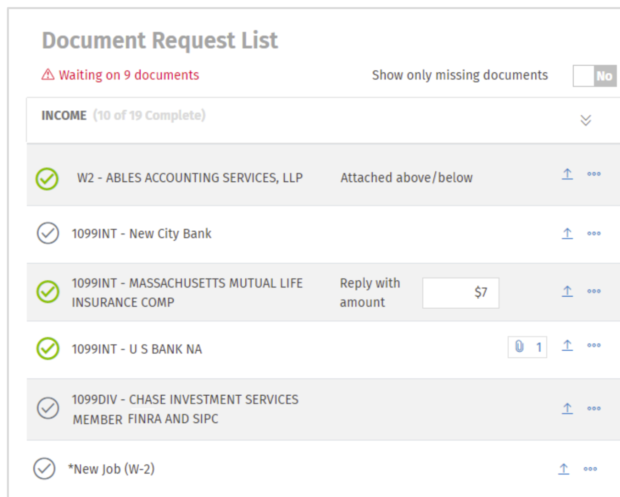
Adding Connections



Build connections to your online accounts. Active Connections will automatically retrieve your year-end tax statement from your financial providers. There are over 350 connections available, and they can help you complete your document request list quickly.

TIP: In each tile represents a small group of additional questions to enable you to complete your organizer a little at a time when you have a free moment.

TIP: Within each tile, selecting “Done” will add a green checkmark to the tile on the Questionnaire Home page, while selecting “Finish Later” will not mark that tile as complete so you can return to it when needed.



TIP: If you don’t have a document to attach for a requested item, use the three dots (•••) and select a quick note to apply. Quick notes also mark an item as complete.

TIP: Use the Yes/No toggle switch at the top to only show missing/outstanding documents.

Notes vs. Messages

Feel free to leave us additional comments about your organizer and events. The options are as follows:

QUESTIONNAIRE DOCUMENT REQUEST LIST NOTES

While completing the Questionnaire or Attaching Documents, at the top, click on Notes, and add a new note about anything that might impact your tax return preparation. We will review your notes and answer any questions when we begin preparing your tax return.

2 When your organizer or return is complete, or if your note requires a more immediate response, send us a secure message, and we will reply within your collaboration hub as soon as we can.

Notify your accountant

Whether you complete your tax organizer all at once or a little bit at a time, you'll need to notify your accountant when you're done. Checkmarks along the left side of the screen indicate you've completed each section. Any missing items from the document request list can still be added later.

Click the "Done" button to submit your information. The system will generate a single ZIP file that includes your Engagement Letter (if one was required) and all of your answers and documents, including tax documents collected through the Connections button. You should download this file so you can maintain a digital copy of all your tax records.

After you send us your information, we'll be in touch with any questions or requests for additional information.

Missing Documents

3 *Missing documents*

If documents are outstanding or you received additional tax statements after you notified us you were "Done", you can upload new files anytime. Navigate to your Task list and click on the button in the "Preparing your Return" section. If there are documents we are still waiting on, you'll see it here too.

Review Return & eSign

When we are done preparing your return, you will need to review it and sign the electronic authorization form (Form 8879) before we can electronically file it. You have two (2) options to electronically sign this document.

1. If you have created a profile to log into your collaboration hub, you can log in, go to your Task list and select Review & Sign. A signing link for the user logged in will be available. Click on the link to be taken to our eSign partner site.
2. You will also receive an email from our eSign partner with a link to review and sign the document. Click on the link to be taken to our eSign partner site.

In both options, the user signing will be prompted to answer knowledge based questions. This is a requirement of the IRS to verify your identity. You must pass 3 of 4 questions successfully before you can view your tax return and sign it.

TIP: If you are filing a joint return, both individuals must sign the electronic filing authorization before the document is marked complete.

When the return has been executed by all parties, a copy will be delivered to your collaboration hub. Download it from your Task list, or from the Document Locker for your records.

TIP: A copy of your tax return will be stored in the Document Locker for two (2) years. Be sure to download a copy for yourself.

Document Locker

The Document Locker will be available for us to share files with each other throughout the year, not only during tax season. So, feel free to upload receipts or any documents when you receive them to make collecting documents for next year's tax season even easier.