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ACCESS

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Oct. 28, 2013

PHOENIX – Oct. 28, 2013 – At its annual Connections user conference, CCH, a Wolters Kluwer business, made several new announcements, including a new Client Dashboard for [CCH Axxess](#), new mobile features, and the renaming of their mobile apps to reflect the [CCH Axxess](#) brand.

Axxess is the only cloud-based modular tax preparation, compliance and firm management solution built from the ground up. Leveraging CCH Axxess on-the-go is made easier for mobile professionals with the newly named and improved mobile app for both [Apple](#) and [Android](#) devices. , a part of Wolters Kluwer is a global provider of tax, accounting and audit information, software and services.

“When we learned about the single database integration platform for CCH Axxess and its mobility features, we decided to switch everything over,” said Karisa Chin, CPA and Partner with the full-service, San Francisco-based, Bay Area tax and accounting firm of [Devereaux, Kuhner & Chin LLP](#). “Being able to integrate our firm’s current CCH solutions and having added flexibility to meet with clients outside the office and show them their tax returns or workpapers on a mobile device is really nice.”

Devereaux, Kuhner & Chin LLP recently joined the growing list of new CCH Axxess customers – choosing to implement the solution within the last month.

“From the feedback we’re hearing from our strong customer partnerships, we

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Google Play) for direct updates or automatically receive an update prompt the next time the app is used – enabling easy downloads of the updated version with one touch and at no additional charge.

New Client Dashboard, More Features

Both new Apple and Android versions of CCH Axxess have an improved user interface with simpler navigation – making it easier to pinpoint specific information faster. Improved functionality, free and available for all users, includes updated pagination and client search capabilities.

The new Client Dashboard feature now enables users to see a client overview on one screen. Information includes:

- Client profile
- Contacts
- Updated notes
- Staff working with client

An updated Client Favorites view lets users quickly see favorite items connected with a specific client from the most recently accessed list.

New mobile premium functionality is also available for CCH Axxess Document, Practice and Workstream modules. Specific mobility enhancements include:

CCH Axxess Document

- New ability to filter file lists by Class, Subclass, year and client name
- Search across all clients for files
- Display all files for each client
- View files in the Client Dashboard

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CCH Axxess Workstream

- Easily view list of open projects for specific client – also on Client Dashboard
- Ability for staff to view their project assignments
- Update project status during transaction entry

Free trials of the CCH Axxess mobile app's premium features, for both [Apple](#) and [Android](#) devices, are available for a limited time.

Advanced Tax Solution to Grow, Manage, Protect Business

CCH Axxess is also the only complete tax practice application built on a single platform that leverages a single integrated database. Cloud-based modules include:

- [CCH Axxess Tax](#) – The heart of the streamlined, digital tax process – supporting ease of tax preparation with thousands of automatically calculating forms and schedules for federal, state, county and city entities; robust diagnostics; and a state-of-the-art electronic filing system.
- [CCH Axxess Document](#) – A feature-rich document management solution to electronically organize and store client source documents, achieving a true digital work environment.
- [CCH Axxess Portal](#) – A secure online digital storage center where clients have 24/7 access to their financial documents and the ability to collaborate with firm staff in real-time, at any time.
- [CCH Axxess Practice](#) – Providing a full-scale practice management system to monitor staff time, produce invoices and handle all aspects of managing firm operations with ease.
- [CCH Axxess Workstream](#) – The full-featured project management solution designed to streamline administrative tasks, such as tracking due dates, identifying key milestones and monitoring project status.

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