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hub for firms and their clients, CCH Axcess Client Collaboration is the next ...

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The CCH Axcess Client Collaboration module offers firms a new way to move client work through their workflows. A unified collaboration hub for firms and their clients, CCH Axcess Client Collaboration is the next evolution of a secure portal.

Firms can send and receive engagement letters, request information, review and deliver returns, obtain e-signed 8879 forms, and send invoices. Clients can review, sign and return engagement letters; respond to a simplified organizer questionnaire and document request list; import their W2s, 1099s, 1098s and other year-end financial documents directly from the source; and can track the entire process from one centralized interface.

Accounting

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