

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

FIRM MANAGEMENT

2020 Review of CCH Axxess Document

Mary Girsch-Bock • Sep. 21, 2020



Wolters Kluwer

CCH Axxess Document

Wolters Kluwer

<https://taxna.wolterskluwer.com/professional-tax-software/axcess/document>

From the 2020 reviews of Document Storage and Document Management systems.

CCH Axxess Document from Wolters Kluwer is well suited for accounting firms of any size. While users will experience greater functionality when used with other Wolters

Kluwer applications, CCH Axxess Document can also be used as a stand-alone document management application.

CCH Axxess Document is a cloud-based application that includes a mobile app that allows users to access and manage all documents from their smart phone or tablet. (For those looking for an on-premise solution, CCH ProSystem *fx* Document is available from Wolters Kluwer as well.)

The CCH Axxess Document dashboard is completely customizable, and users are able to add up to six document panes to the home page for easy document access. All documents stored in CCH Axxess Document are stored in their native file format with an option to create a PDF of any document for security purposes. Custom folders can be easily created for each client, and users are able to create a folder template for expedited folder setup. The dashboard also displays a list of all currently checked-out files as well as a list of recently accessed files.

Accessing a file is easy using the tabs found in Document Central. Users can also add desktop shortcuts to Document Central that will point directly to a stored file, or a file hyperlink can be copied, with the option of inserting the link into another document.

CCH Axxess Document offers excellent management tools for accounting firms, including easy document lookup, document check-in and check-out, file versioning, direct editing of any document, and a file overdue notification which alerts users if a file is checked out longer than scheduled. Firm managers can also create and set a document retention policy that can be used firm wide. Authorized users will always be able to view exactly where a file is at any time, and good search options enable users to search for documents using a client name, file name, document name, keyword, document class or subclass in the search process.

During the product setup process, managers can establish file naming conventions, with the ability to add classes or subclasses to documents as well. Each new user is automatically subscribed to a pre-defined folder template, users are able to create additional templates as desired. Once a document has been uploaded to a folder, the folder template cannot be changed. CCH Axxess Document also offers complete audit trail functionality in the application, displaying which documents have been accessed as well as any changes that were made.

The biggest drawback to CCH Axxess Document is the lack of a scanning option, but users can integrate the application with CCH ProSystem *fx* Scan if scanning a

document is necessary. Scanned documents can be imported directly into the application.

For secure sharing of documents with clients, users will need to subscribe to CCH Axxess Portal, which offers bi-directional file sharing capability, with users able to share to a client portal directly from CCH Axxess Document. Users can also publish a file to the portal if desired. Users can add new portal users, edit an existing user, or delete a portal user as needed.

CCH Axxess Document includes 256-bit Secure Socket Layer encryption, with password-protected access. All files stored in CCH Axxess Document are encrypted immediately, remaining that way during both storage and transmission, and all files are backed up on a daily basis. In addition, any documents uploaded to CCH Axxess Document are scanned for viruses.

CCH Axxess Document seamlessly integrates with other CCH Axxess applications including CCH Axxess Tax, CCH Axxess Practice, CCH Axxess Portal, and CCH Axxess Data Insights, as well as CCH ProSystem *fx* applications, such as ProSystem *fx* Scan, ProSystem *fx* Tax, and ProSystem *fx* Engagement. The application also integrates with Microsoft applications such as Word and Excel. The product uses an Open Integration Platform for integration with third-party applications.

CCH Axxess Document users can access the product support page, which includes product videos, a searchable knowledge base, an FAQ page, and direct access to the product help page, which includes getting started options, and help in working with files, managing files, and searching for files. Users can log in to open a support case or contact support via telephone, email, or chat. Users can also request a remote support session for more difficult issues.

CCH Axxess Document is a cloud-accessible document storage and management application that's suitable for accounting firms of any size. CCH Axxess Document offers excellent integration with other Wolters Kluwer applications which include both CCH Axxess and CCH ProSystem *fx* applications. Pricing for CCH Axxess Document is available directly from Wolters Kluwer upon request, with add-on applications priced separately.

2020 Rating – 5 Stars

Strengths:

- Excellent integration with other CCH Axxess and ProSystem *fx* applications

- Product is accessible from within tax preparation applications
- Includes an Open Integration Platform for integration with third-party applications

Potential Limitations:

- Better suited for firms using other Wolters Kluwer applications
- Lack of a scanning option

.

Firm Management • Reviews • Review

CPAPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2023 Firmworks, LLC. All rights reserved