

CCH Axxess™ Workflow for Corporate Tax Departments

Datasheet



MAXIMIZE YOUR TEAM'S CAPACITY AND ORCHESTRATE YOUR DELIVERABLES

Organizations looking to prioritize due date tracking, risk mitigation, work quality and employee engagement can benefit from CCH Axxess Workflow's advanced productivity features. Tax professionals can manage returns with multiple team members where deadlines are critical and risk can be high.

CCH Axxess Workflow streamlines operational processes and administrative requests, so you can be certain that work will be completed on time, accurately and within budget.



Create 360° visibility

Gain transparency into all departments' processes, provide a shared understanding of goals, timelines, and responsibilities, and manage deliverables and project knowledge in a central hub.



Promote accountability

Ensure effective governance of all departmental projects with structured workflows that include standardized tasks, integrated checklists, live status updates, and process history.



Manage capacity

Manage your team's workload by ensuring effective distribution, work prioritization, and resource allocation for departmental projects. Be more efficient and promote work-life balance.



Reduce risks

Identify potential risks and reduce audit concerns with standardized tasks, checklists, due-date tracking, and signoffs embedded into all processes as well as providing real-time status updates and reporting.

Effectively manage resources and staff

Checklists

Flexible and dynamic tool for delegating responsibilities within the department, automatically populating assigned employee's personal checklists with their tasks. Users can enter Points to include important notes, or to ask any questions that come up during a project. This allows for multiway, open communication as a project moves through the workflow.

Resource Allocation Scheduler (RAS)

A real-time, fully automated resource management and scheduling tool for the short-term or current period. With just a few clicks, the RAS empowers you to assign work in real time. It provides a snapshot of all the work as it comes in the door, and lets you find availability based on role, skill level, work assigned, and anticipated work.

Calendar-Based Scheduling (CAL)

An optional module controls larger, more complex work that needs to be scheduled in the future. It offers two ways to schedule larger projects: by resource or by task. Individuals and managers can see blocks of time that indicate whether or not staff has availability, as well as identify resources who are overloaded to balance workloads.

Use CCH Access Workflow to:

- Keep track of due dates across many different jurisdictions and tax return types. Stay up-to-date on deadline changes and easily shift projects when deadlines change.
- Minimize risk in larger teams with project sign-offs. Users can sign their name and date the stages of the workflow process on a per-task basis.
- Increase accountability with at-a-glance views showing status, due dates and other key information.
- Manage resources more effectively with clear visibility into who is working on what.
- Improve efficiency with the ability to access points, checklists, and sign-offs, and directly link to tax returns and documents in CCH Access™ Tax and CCH Access™ Document.
- Reduce reliance on email and limit the impact of staff turnover with centralized knowledge of projects. Managers can easily monitor projects and shift tasks or resources when necessary.

Address common challenges

Constant tax legislation changes:

The constant changing of federal and state laws lead to tax practitioners spending their valuable time on research to do their job right. With CCH Access™, updates are automatic, forms are relevant, and product guides, support, and research tools, such as CCH® AnswerConnect, are available at a single right-click.

The labor shortage in accounting:

The lack of accounting graduates and the high percentage of resignations have significantly contributed to the turnover rate of accounting professionals which has doubled in recent years. Hiring cannot keep pace with resignations and companies are forced to juggle existing resources to meet deadlines. Wolters Kluwer solutions can help you close the gap by offering high-impact automation or Xpitax® Tax Preparation Outsourcing.

Tax function as a cost center:

Paying taxes is often less of an issue than paying for compliance. The tax function is often considered as a cost center that does not directly bring revenue. Workflows and tax automation enable companies to reduce tax compliance costs by saving time and money.

Other CCH® solutions to improve your team's productivity

CCH Access Tax

Always up-to-date cloud-based tax compliance software that automates the entire tax return preparation process.

CCH Access Document

A feature-rich document management solution that electronically organizes and stores all types of documents and organization's communications.

CCH Access Engagement Pro

A cloud workpaper management and trial balance solution that enables your corporate tax and accounting teams to access files anytime, anywhere, and manage workpapers, trial balances, and workflow all from one central hub.

CCH Fixed Assets Manager

A cloud solution to help you manage, track, and support all your assets depreciation, compliance, reporting, and planning.

CCH AnswerConnect

The most comprehensive and reliable tax browser-based research tool.

CCH Access Open Integration APIs

An application programming interfaces (APIs) that can help your team to build integrations with other software you already use.

CCH Access iQ

Predictive intelligence helps track tax legislation changes affecting organization.

About Wolters Kluwer

Wolters Kluwer (WKL) is a global leader in professional information, software solutions, and services for the healthcare; tax and accounting; governance, risk and compliance; and legal and regulatory sectors. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services. Wolters Kluwer reported 2022 annual revenues of €5.45 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 20,000 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands. Wolters Kluwer shares are listed on Euronext Amsterdam (WKL) and are included in the AEX and Euronext 100 indices. Wolters Kluwer has a sponsored Level 1 American Depositary Receipt (ADR) program. The ADRs are traded on the over-the-counter market in the U.S. (WTKWY).

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