



## Virtual BKR/CCH Axxess User Event

**Purpose:** BKR to host an in-depth BKR/CCH Axxess User event for members. This is a deep dive discussion to help users maximize CCH Axxess™ – Cloud Tax and Accounting Software Platform. This session will be presented by Wolters Kluwer.

**Who Should Attend?** The Roadmap session is open to all. Roundtables are limited to existing users. See the schedule for the roundtable that fits your needs.

**Requirements:** – Pre-work is required.

Below is the required homework/pre-work that will need to be completed and submitted no later than Wednesday, July 6, for review by the CCH team. Registration is required.

**Date:** August 1, 2022

**Time:** 10:00 a.m. – 5:30 p.m. (All times are based on Eastern Time.)

**Format:** Zoom – Details will be sent upon registration.

**Maximum participants:** Opening session is unlimited and open to all; 25 per roundtable session – *existing Axxess users only.*

### SCHEDULE

|                         |  |
|-------------------------|--|
| 10:00 a.m. – 10:45 a.m. | CCH Axxess Roadmap Session & CCH User Conference |
| 10:45 a.m. – 12:15 p.m. | Roundtable – Admin Staff Focus                   |
|                         | 15 Minute Break                                  |
| 12:30 p.m. – 2:00 p.m.  | Roundtable – Prep Staff Focus                    |
|                         | 10 Minute Break                                  |
| 2:10 p.m. – 3:40 p.m.   | Roundtable – Review Staff Focus                  |
|                         | 20 Minute Break                                  |
| 4:00 p.m. – 5:30 p.m.   | Roundtable – Partner Level Focus                 |

**CPE Hours: 1.5 hours for individual roundtable sessions.**

Pre-work: Due no later than July 6.

Submit your answers to Chuck Moss at CCH via email at:  
[chuck.moss@wolterskluwer.com](mailto:chuck.moss@wolterskluwer.com).

- Detailed workflow – 1040 processing from start to finish.
- Pain points?
- Automation – Is this being used? Or being discussed within the firm? If you are, how?
- What do you believe are your responsibilities within the workflow process?
- Indicate your focus level: Admin Staff Focus, Prep Staff Focus, Review Staff Focus, or Partner Level Focus.

The following products will be covered.

- CCH Pro System fx Scan/AutoFlow/PDFlyer
- CCH Axxess Tax
- CCH Axxess Workstream

For general questions, please contact [bkr@bkr.com](mailto:bkr@bkr.com).

Your BKR Team