Introducing CCH Collaboration

JANUARY 9, 2024 | BY: THE LEADERSHIP TEAM



We are excited to introduce Client Collaboration, a secure digital hub for our clients to organize and provide us their tax information. When using Client Collaboration, you can eSign your engagement letter(s), complete your digital online tax organizer and upload your tax documents electronically, all in a centralized location.

As part of this transition, you will be receiving an email within the next week with your personalized link to create your Client Collaboration account to begin organizing and uploading your 2023 tax information. Please be sure to check your inbox for this initial email (and check your spam folder), as it will contain the information you need to create your account. The email subject line will read as "noreply: Johnson O'Connor Feron & Carucci, LLP invited you to the Client Collaboration Portal."

To help you with this transition, we have linked several "How-To" Videos about Client Collaboration for your reference and recommend viewing them in the following order:

1. **Registering your User ID & Logging into your Client Collaboration Hub**
2. **Signing your Engagement Letter electronically with eSign**
3. **Getting Started with your Tax Organizer**

As a reminder, we are asking clients to submit their tax information to us by **March 18, 2024** to avoid an extension. With the implementation of Client Collaboration, all Tax Caddy accounts will be de-linked from Johnson O'Connor. If you have a Tax Caddy account it will continue to exist, but you will not be able to share information with JO through Tax Caddy. Although we will generally not be mailing paper tax organizers to clients this year, please let us know if you would prefer a paper organizer and we will send one to you.

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