

Kassouf

CLIENT COLLABORATION GUIDE



Client Collaboration Guide

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CREATING A CLIENT COLLABORATION ACCOUNT



1 You will receive the following email welcoming you to the Client Collaboration Hub. Register your account by clicking “Register my account” or clicking the link below the button. For additional help, watch the registration tutorial video.

KASSOUF & CO INC invites you to the Client Collaboration Hub

 To 

Retention Policy Default Exchange Retention Policy (1 year, 6 months)

 If there are problems with how this message is displayed, click here to view it in a web browser.

  Reply  Reply All  Forward  

Kassouf

CPAs and Advisors

Collaborating with KASSOUF & CO INC has never been easier!

Welcome to the **Client Collaboration** hub. Your personalized hub is an easy way for you to securely collaborate and communicate with our tax professional team at any time.

To get started on your **Two, Test - 2024 Individual Tax** follow these steps:

Step 1: Register your account to setup your user ID and password

[Register my account](#)

or go to <https://clientcollaboration.cchaccess.com>

Please note, the Registration link will expire after 90 days.
Should you need assistance with the registration process, please watch our [registration tutorial video](#).

Step 2: Log into your Hub

[Go to my hub](#)

or go to <https://clientcollaboration.cchaccess.com>

We recommend you bookmark this link in your web browser for future reference!

Using a mobile device? Client Collaboration is now mobile! After completing your registration, you can download our app from the iOS App Store or Google Play Store!

Use this following firm key to connect directly to your firm upon your first login or use the button below on your mobile device to get started.

[Connect with your firm](#)

Mobile Firm Key: z6UpkEAZ

Once you have established your firm connection, it will be saved for subsequent logins.

Have any questions or concerns before getting started? Contact us today.
Join us on mobile – download our app today!

2 You will be taken to this screen. Fill in the information, creating your own username and password. Then click the “Register” button.

Kassouf
CPAs and Advisors

Register your identity

EMAIL

Test Two [Update Name](#)

1 (US) Phone Ext

User ID

Password

Confirm Password

I'm not a robot  reCAPTCHA
Privacy - Terms

Register

3 You will be sent another email confirming your registration and user ID. Open this email and click on the “Go to my hub” button.

KASSOUF & CO INC Client Collaboration Hub – Registration Successful

 To 

Retention Policy Default Exchange Retention Policy (1 year, 6 months)

 If there are problems with how this message is displayed, click here to view it in a web browser.

Kassouf

CPAs and Advisors

KASSOUF & CO INC, you have successfully registered with KASSOUF & CO INC!

You may now login to your Client Collaboration Hub using the following user ID:

User ID : kassouftest

Go to your personalized hub to get started.

Go to my hub 

or go to <https://clientcollaboration.cchaxces>

We recommend you bookmark this link in your web browser for future reference!

Using a mobile device? Client Collaboration is now mobile! After completing your registration, you can [download our app](#) from the iOS App Store or Google Play Store!

Use this following firm key to connect directly to your firm upon your first login or use the button below on your mobile device to get started.

Connect with your firm

Mobile Firm Key: z6UpkEAZ

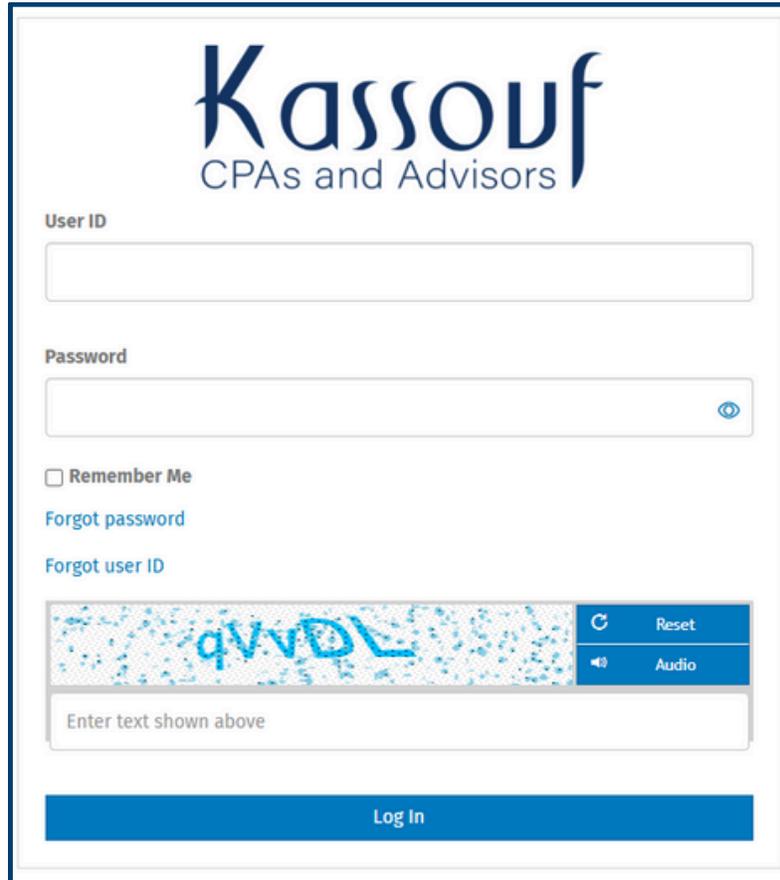
Once you have established your firm connection, it will be saved for subsequent logins.

Have any questions or concerns before getting started? Contact us today.

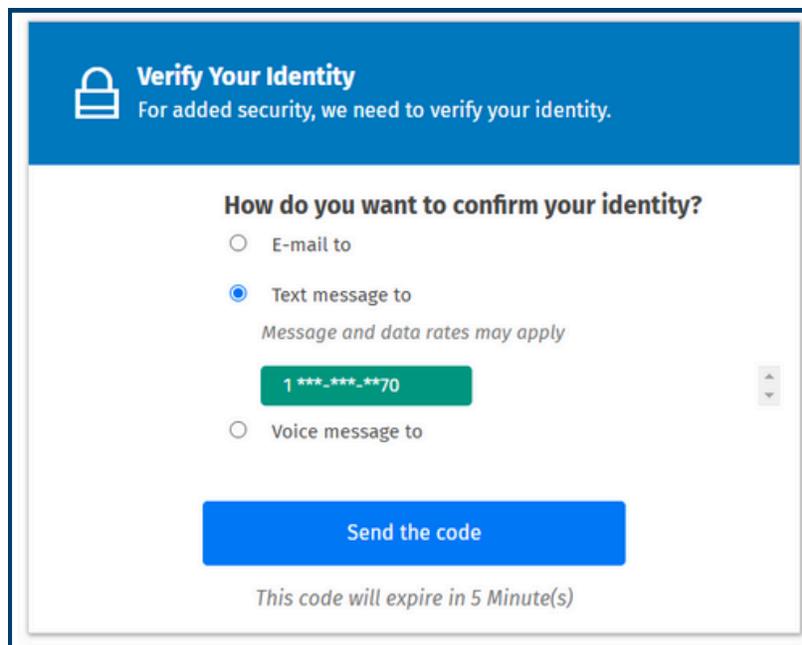
Join us on mobile – download our app today!

4 Sign in with the username and password you created.
Verify your identity through text, email, or voice.
Welcome to the Client Collaboration Hub!



The login page features the Kassouf CPAs and Advisors logo at the top. Below the logo are two input fields: 'User ID' and 'Password'. The password field includes a toggle icon for visibility. There are links for 'Remember Me', 'Forgot password', and 'Forgot user ID'. A CAPTCHA image shows the text 'qVVvDL' with 'Reset' and 'Audio' buttons. Below the CAPTCHA is an input field labeled 'Enter text shown above'. At the bottom is a large blue 'Log In' button.



The 'Verify Your Identity' page has a blue header with a padlock icon and the text 'Verify Your Identity' and 'For added security, we need to verify your identity.' Below this is the question 'How do you want to confirm your identity?' with three radio button options: 'E-mail to', 'Text message to' (which is selected), and 'Voice message to'. Under 'Text message to' is the note 'Message and data rates may apply' and a green input field containing '1 ***-***-***70'. A blue 'Send the code' button is at the bottom, with the text 'This code will expire in 5 Minute(s)' below it.

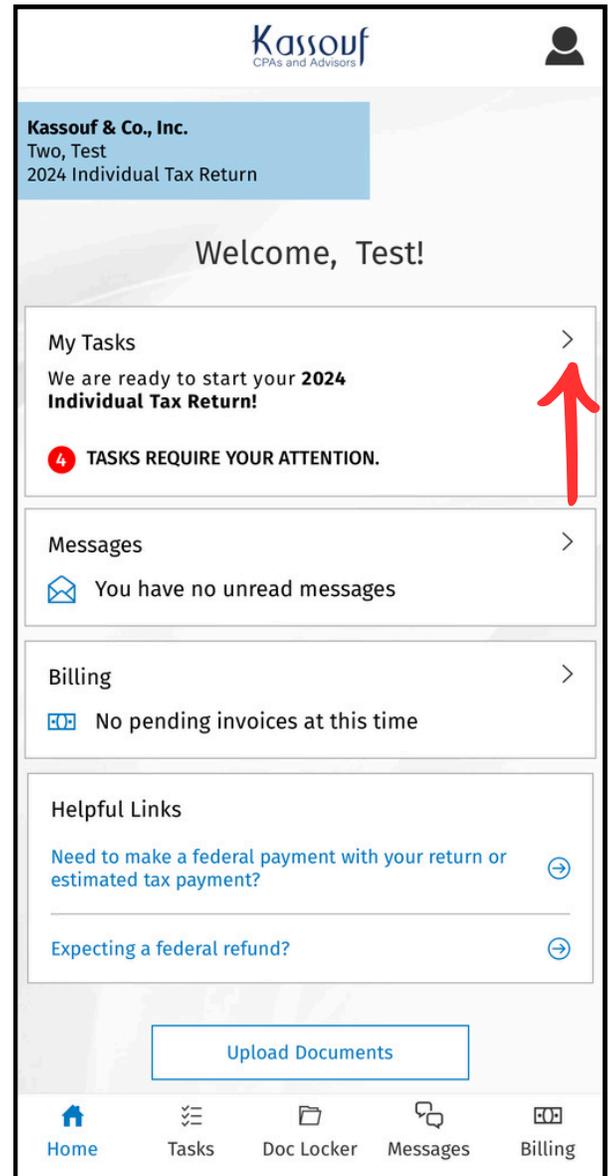
GET TO KNOW THE CLIENT COLLABORATION HUB



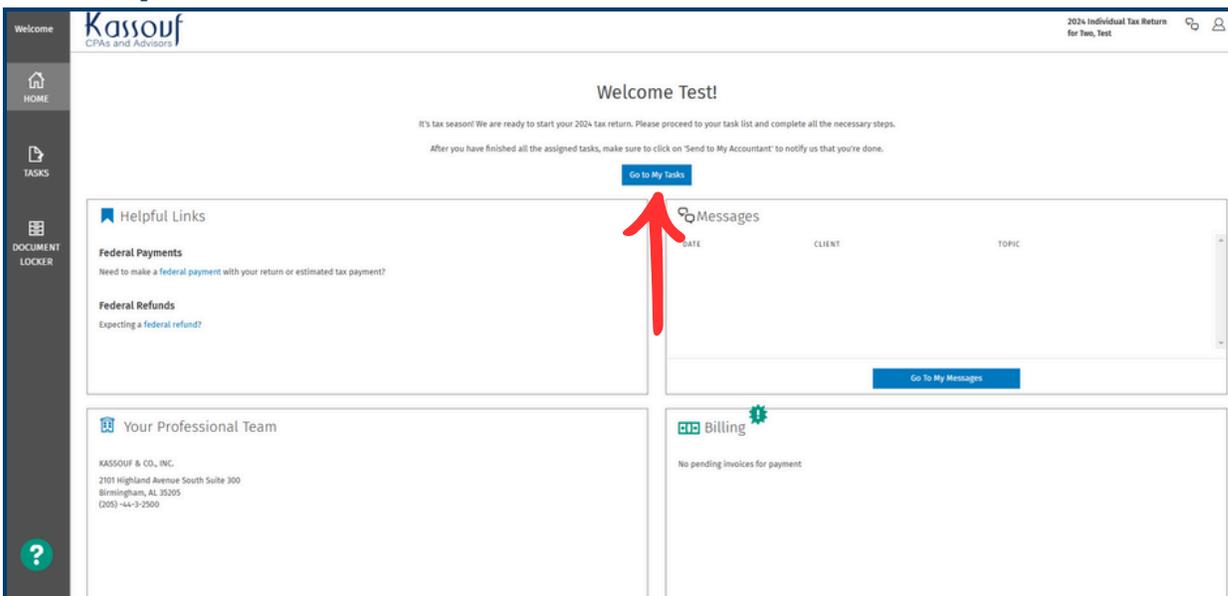
Home Page

The Home page contains information about your hub, including contact details, users who have access, invoices, and messages. You can open your tasks from the Home page by clicking the “Go to My Tasks” button on desktop or “My Tasks” on mobile.

Mobile:



Desktop:

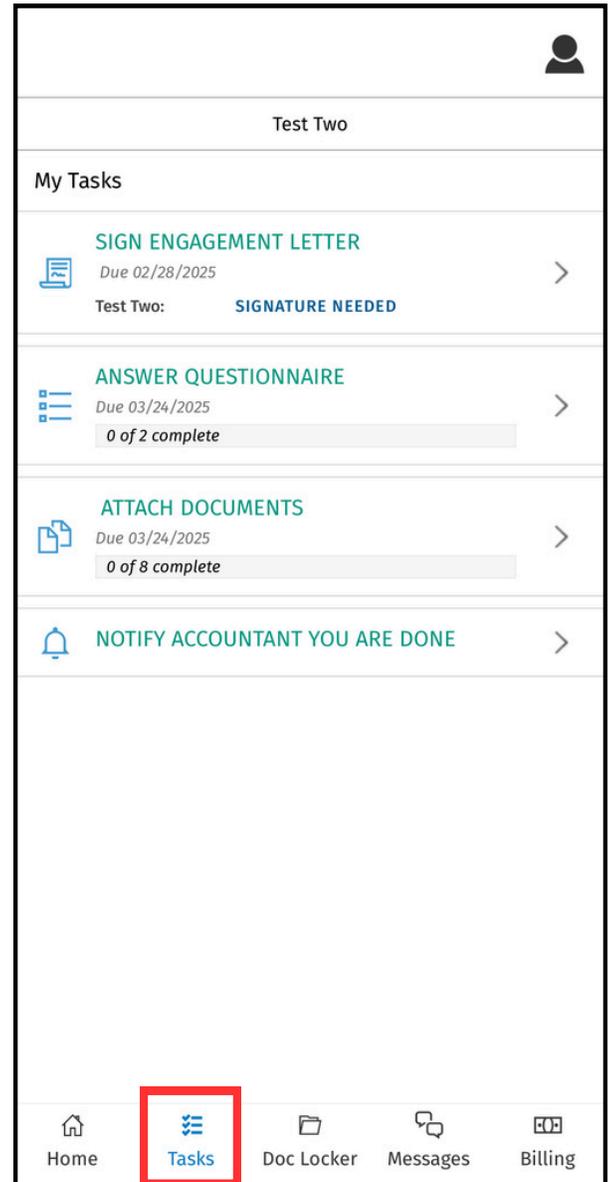


Note: We are not currently using the billing feature in the Hub.

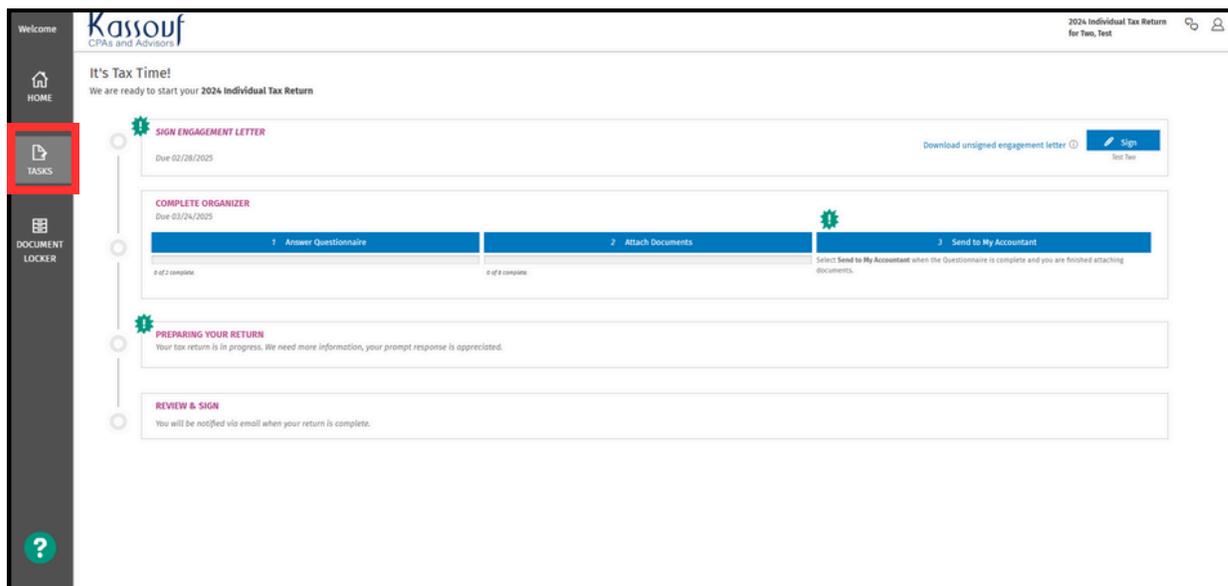
Tasks

The Tasks page will guide you through the tax return process. As you complete steps, they will be checked off so you know what's left to complete.

Mobile:



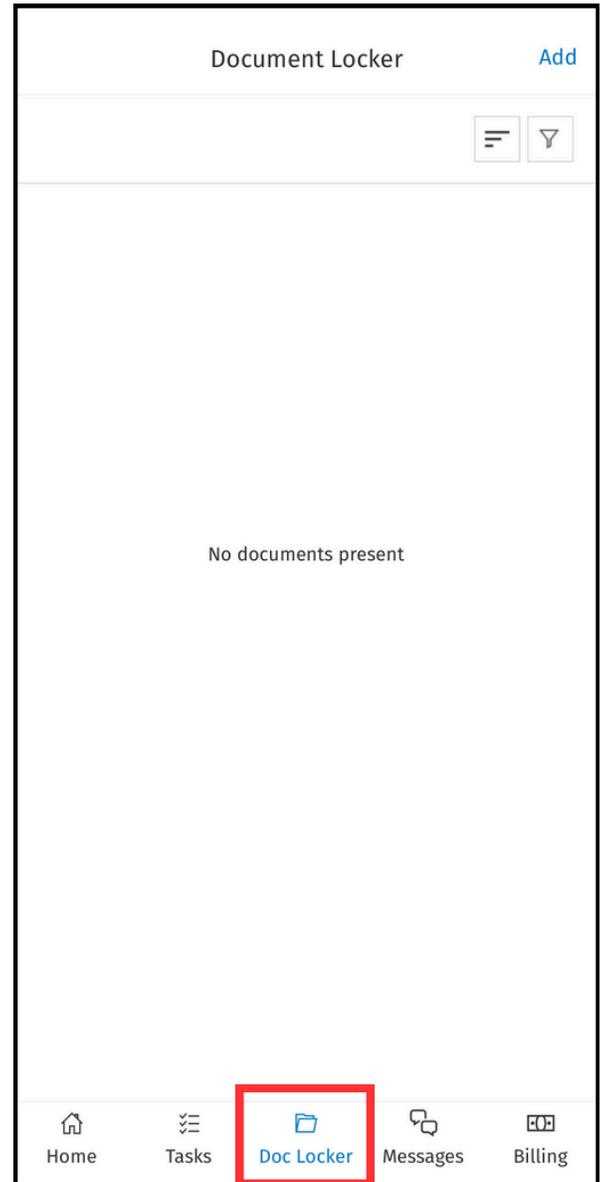
Desktop:



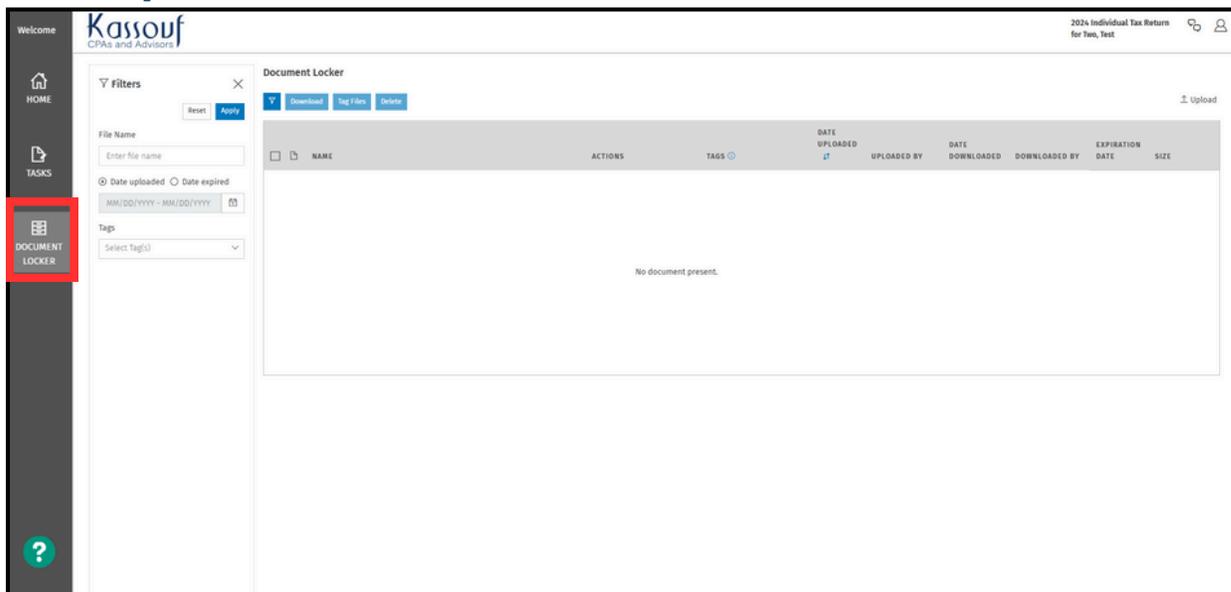
Document Locker

The Document Locker allows you to exchange documents with us that aren't a part of your tax organizer. Please note that any documents you upload here must be manually attached to your organizer at the end of the year. A PDF of your tax return will also be saved here once filed.

Mobile:



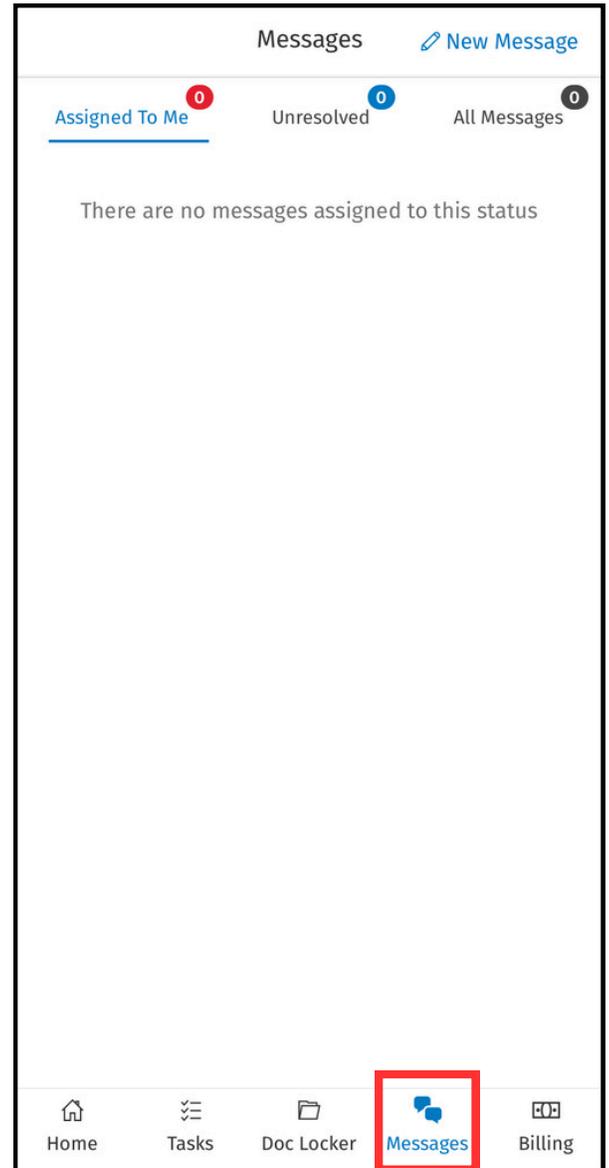
Desktop:



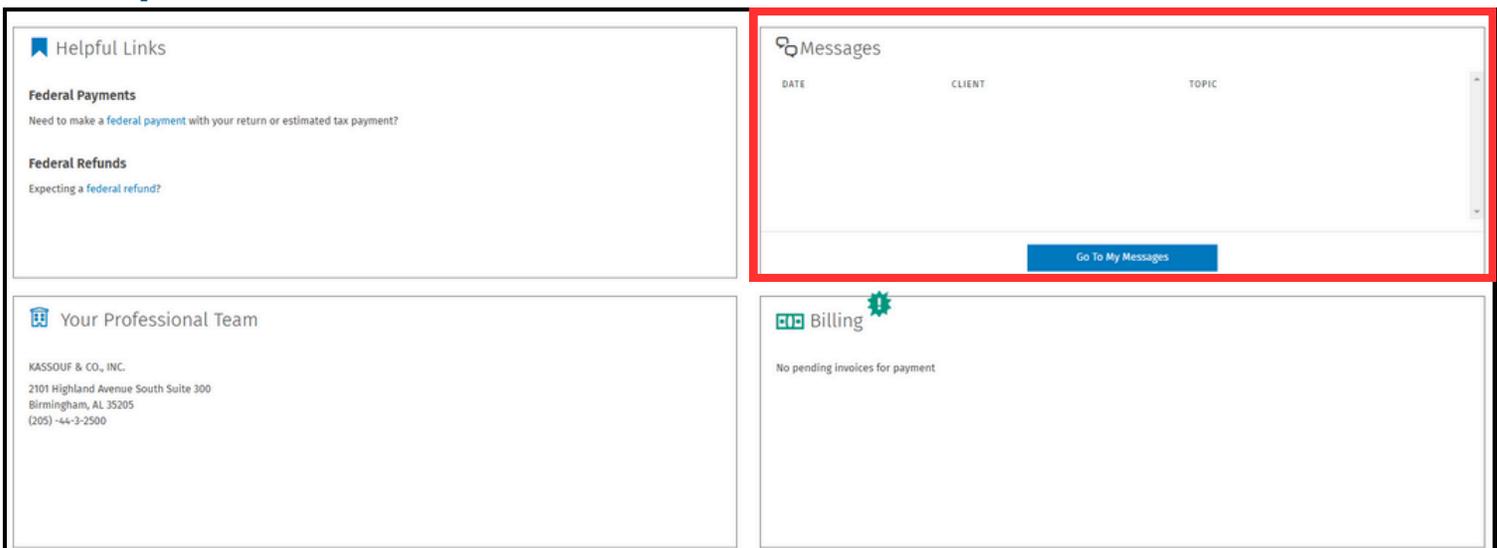
Messages

The two-way messaging system enables seamless communication between you and our team, right from your dashboard.

Mobile:

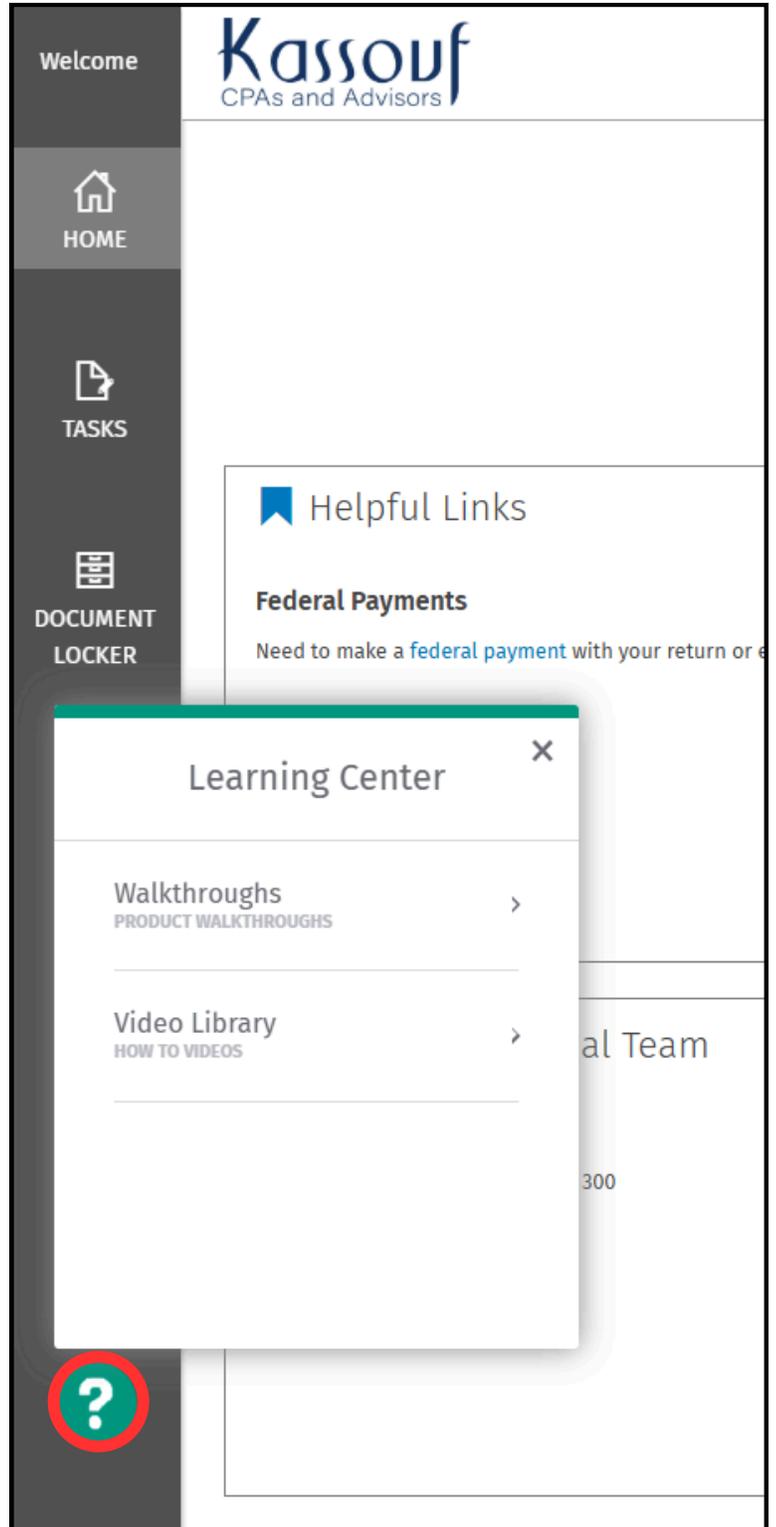


Desktop:



Help Button

The Help button, found in the bottom left corner of the desktop Home page, contains walkthroughs and how-to videos to help you navigate and use the system effectively.

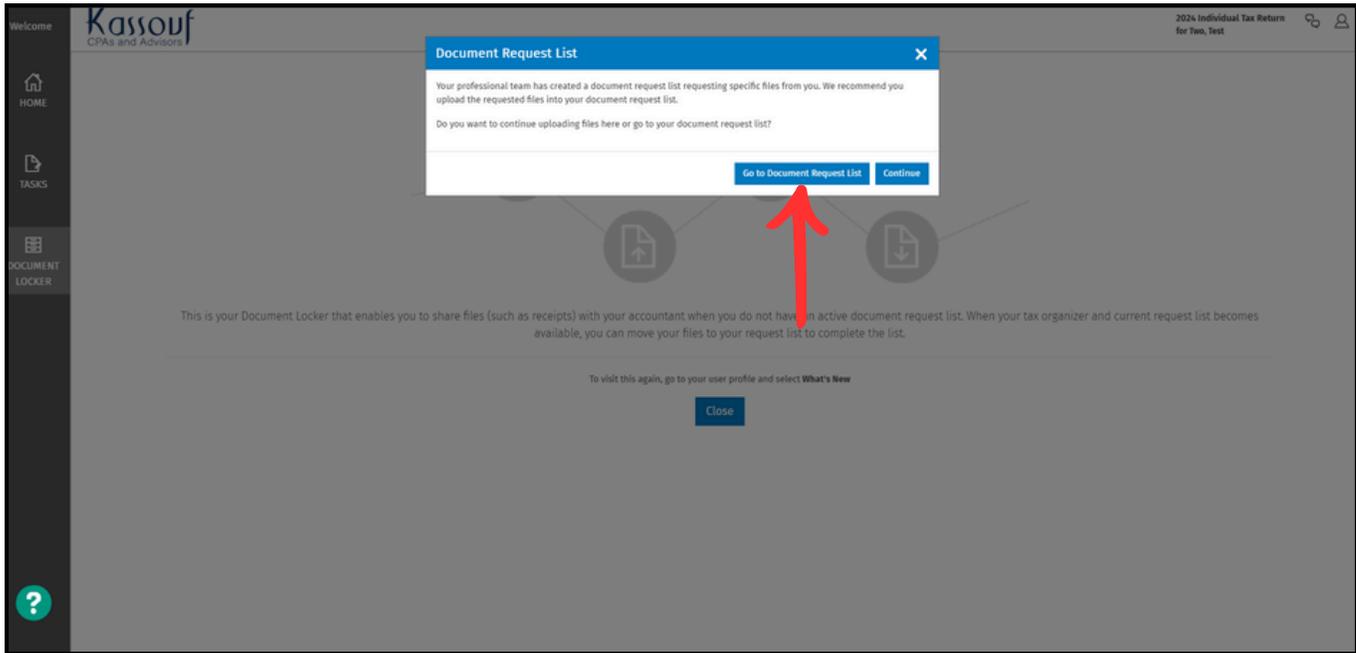


HOW TO CORRECTLY UPLOAD DOCUMENTS

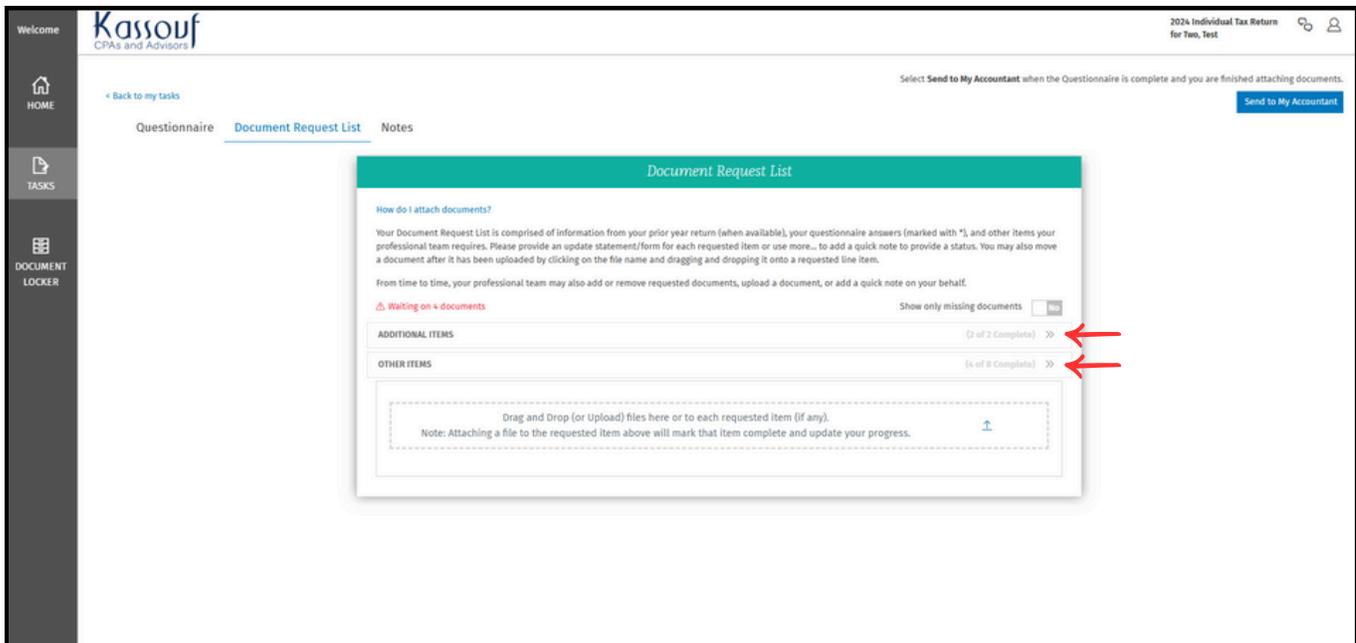


Always upload documents requested as part of your tax organizer to your document request list rather than using the Document Locker. Uploading documents outside of the designated request list can prevent you from tracking your progress.

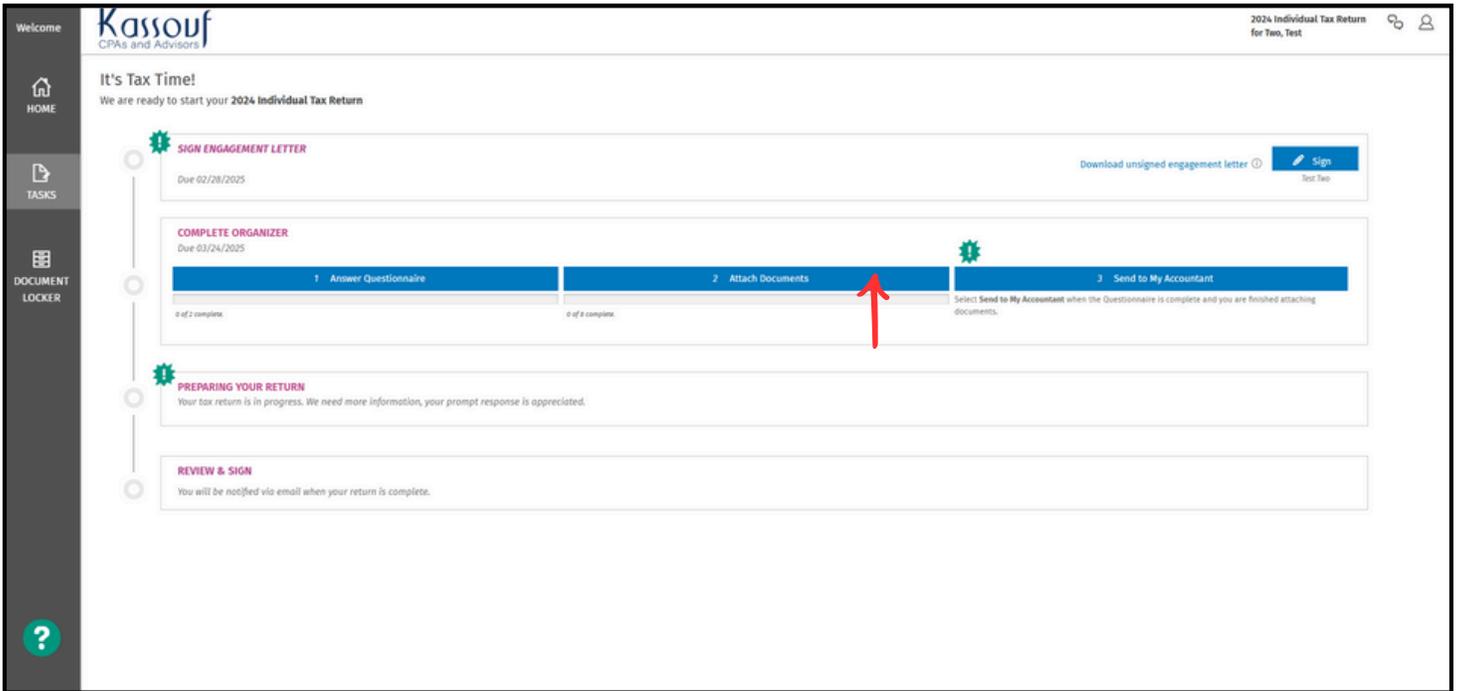
When you attempt to upload documents to the Document Locker, you'll receive the following message:



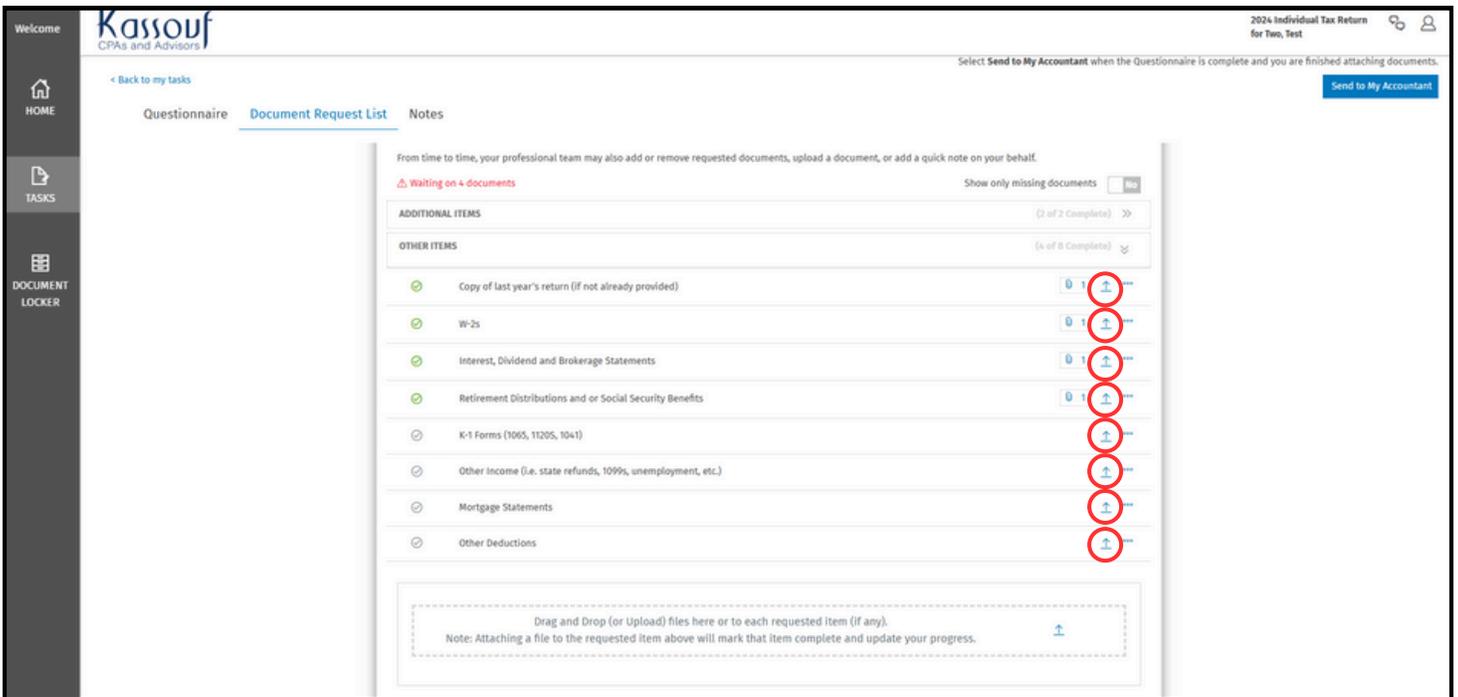
Click “Go to Document Request List” to upload requested documents. Click the double arrows to expand each request.



You can also access your document request list through the Tasks screen. Click on “Tasks” in the sidebar and click “Attach Documents.”



You will be taken to the document request list. Click the upload icons to attach your tax documents.



By uploading into the Document Request List, you can track your tax return progress in real-time as you upload documents.

Welcome
Kassouf
CPAs and Advisors
2024 Individual Tax Return for Two, Test

It's Tax Time!
We are ready to start your 2024 Individual Tax Return

TASKS

DOCUMENT LOCKER

SIGN ENGAGEMENT LETTER
Signatures completed on 02/28/2025
Download signed engagement letter
Signed Test Two

COMPLETE ORGANIZER
Due 03/24/2025

1 Answer Questionnaire 2 of 2 complete	2 Attach Documents 10 of 10 complete	3 Send to My Accountant Select Send to My Accountant when the Questionnaire is complete and you are finished attaching documents.
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PREPARING YOUR RETURN
Your tax return is in progress. There are no missing items at this time.

REVIEW & SIGN
You will be notified via email when your return is complete.

Welcome
Kassouf
CPAs and Advisors
2024 Individual Tax Return for Two, Test

It's Tax Time!
We are ready to start your 2024 Individual Tax Return

TASKS

DOCUMENT LOCKER

SIGN ENGAGEMENT LETTER
Signatures completed on 02/28/2025

COMPLETE ORGANIZER
Completed & Sent 02/28/2025
You submitted your tax data on 02/28/2025. Your data has been locked from change, but you may download a copy for your reference. Contact your accountant to provide any needed changes or additional information, or send a request to Reopen your Request.
Download
Request to Reopen

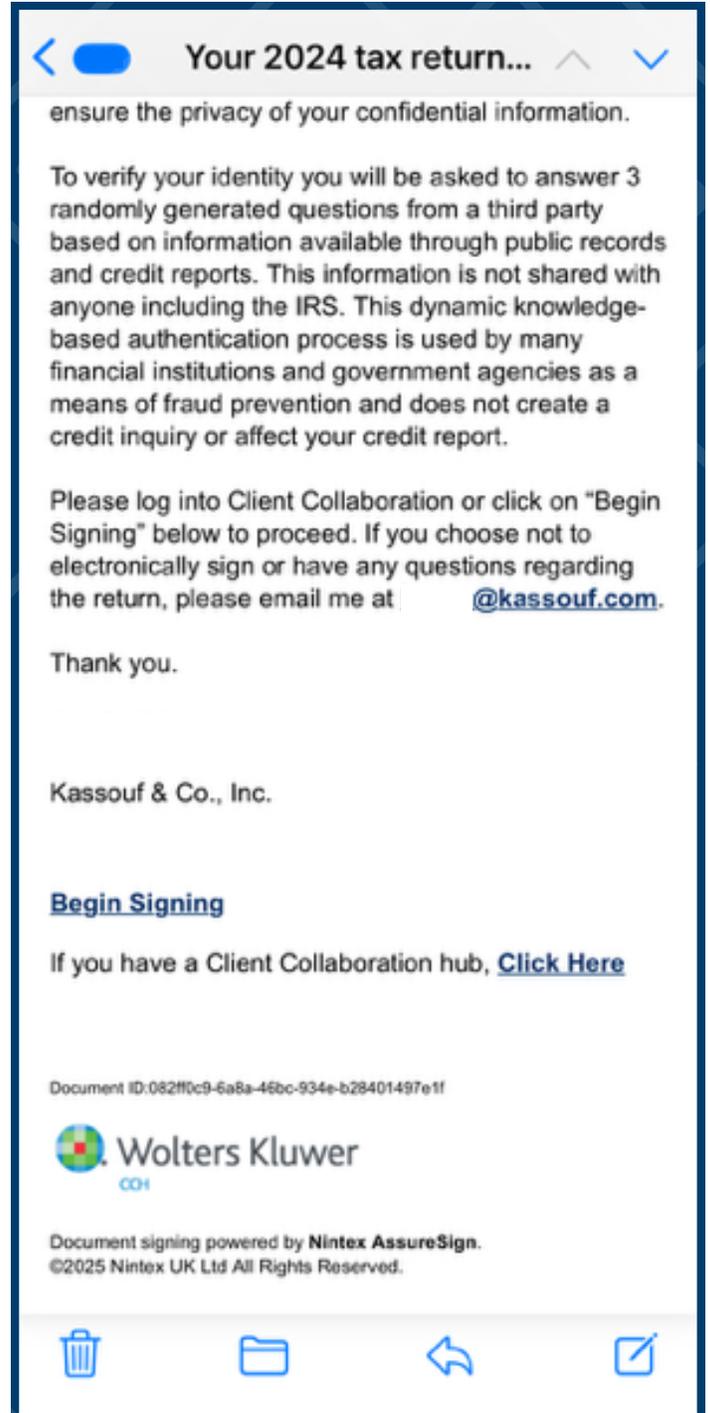
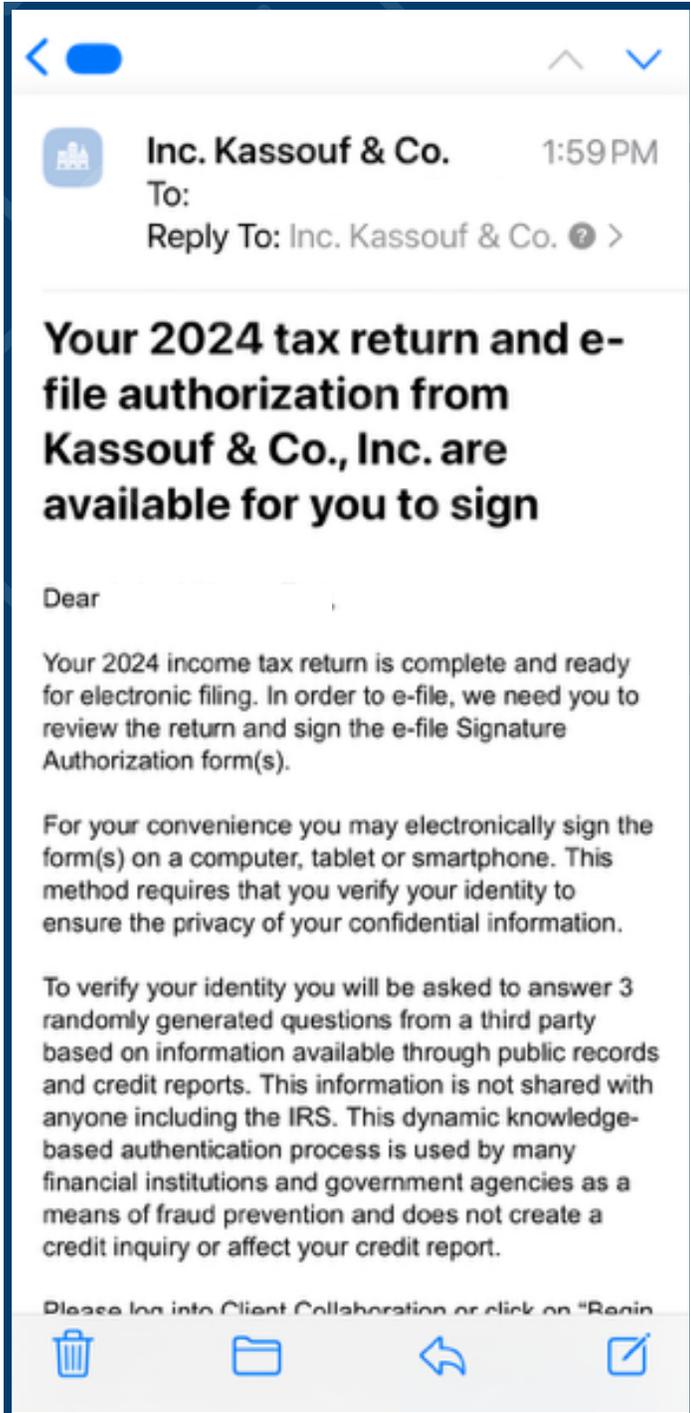
PREPARING YOUR RETURN
Your tax return is in progress. There are no missing items at this time.
Send More Items

REVIEW & SIGN
You will be notified via email when your return is complete.

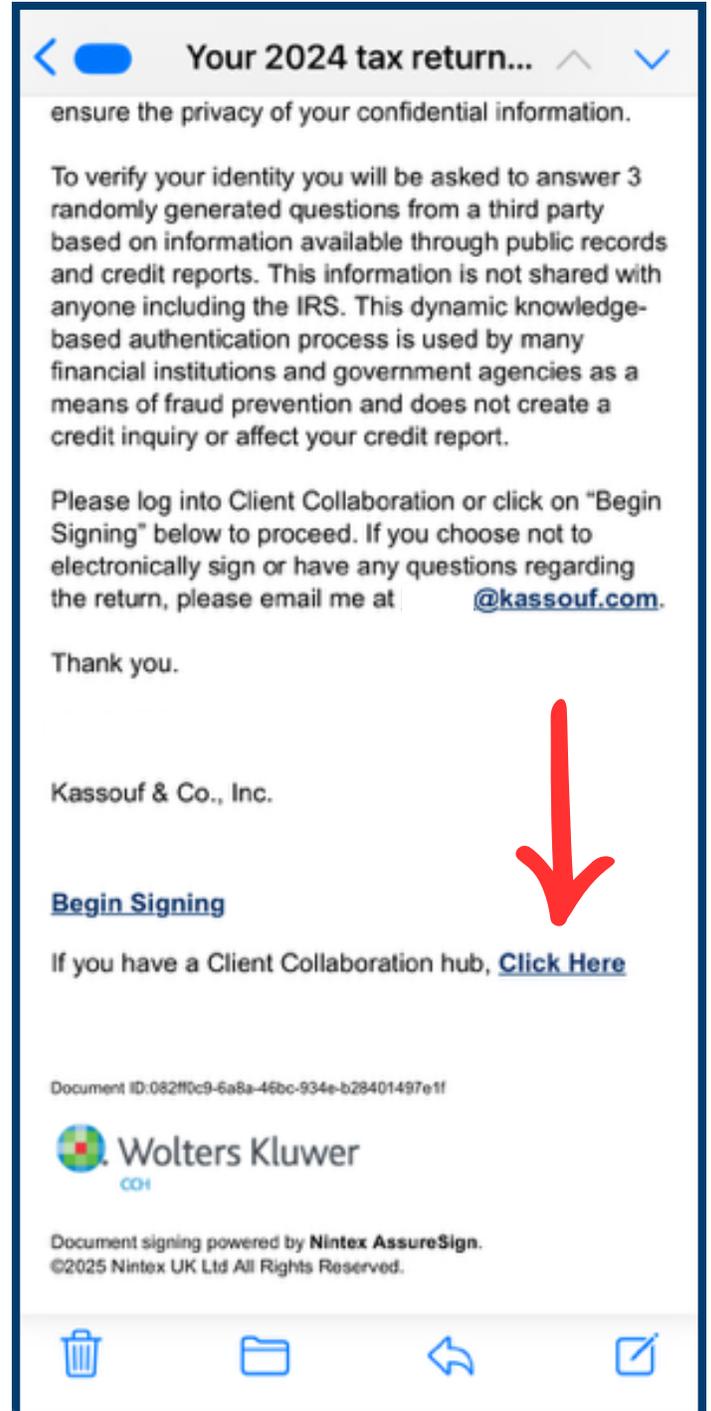
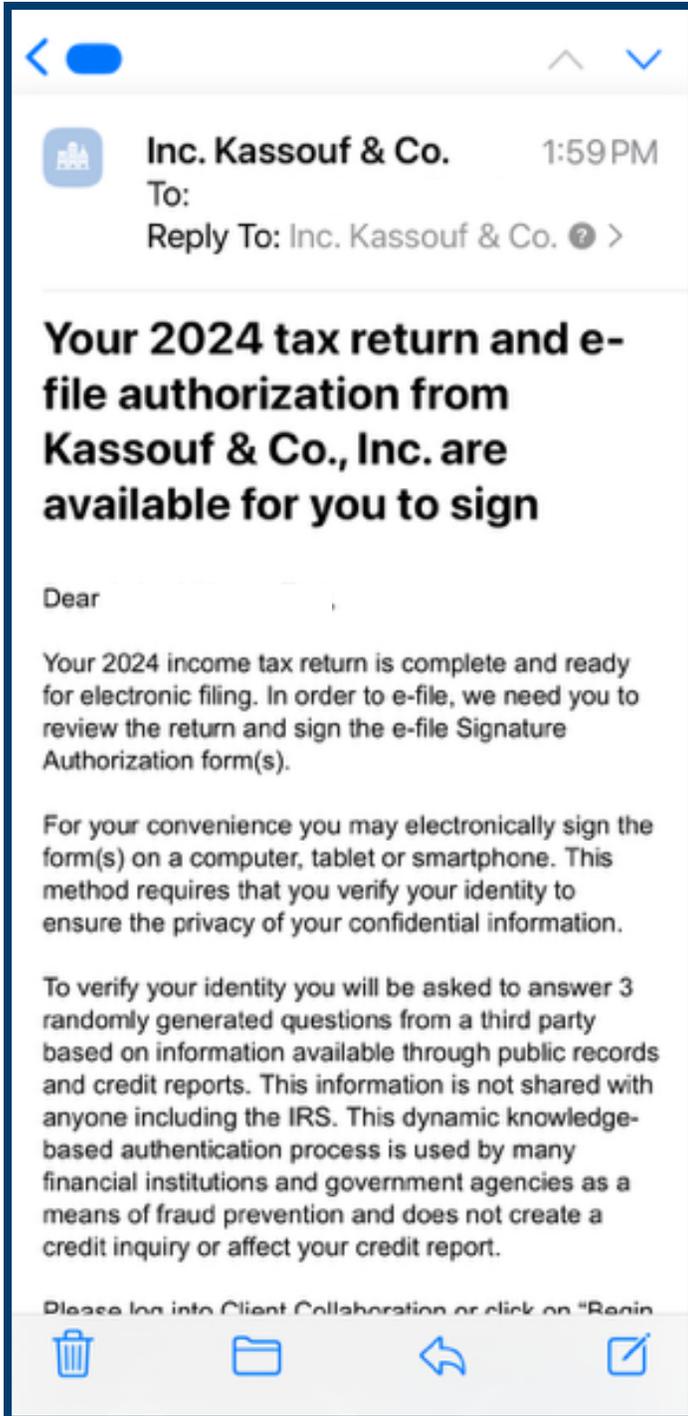
SIGNING AN E-FILE THROUGH CLIENT COLLABORATION



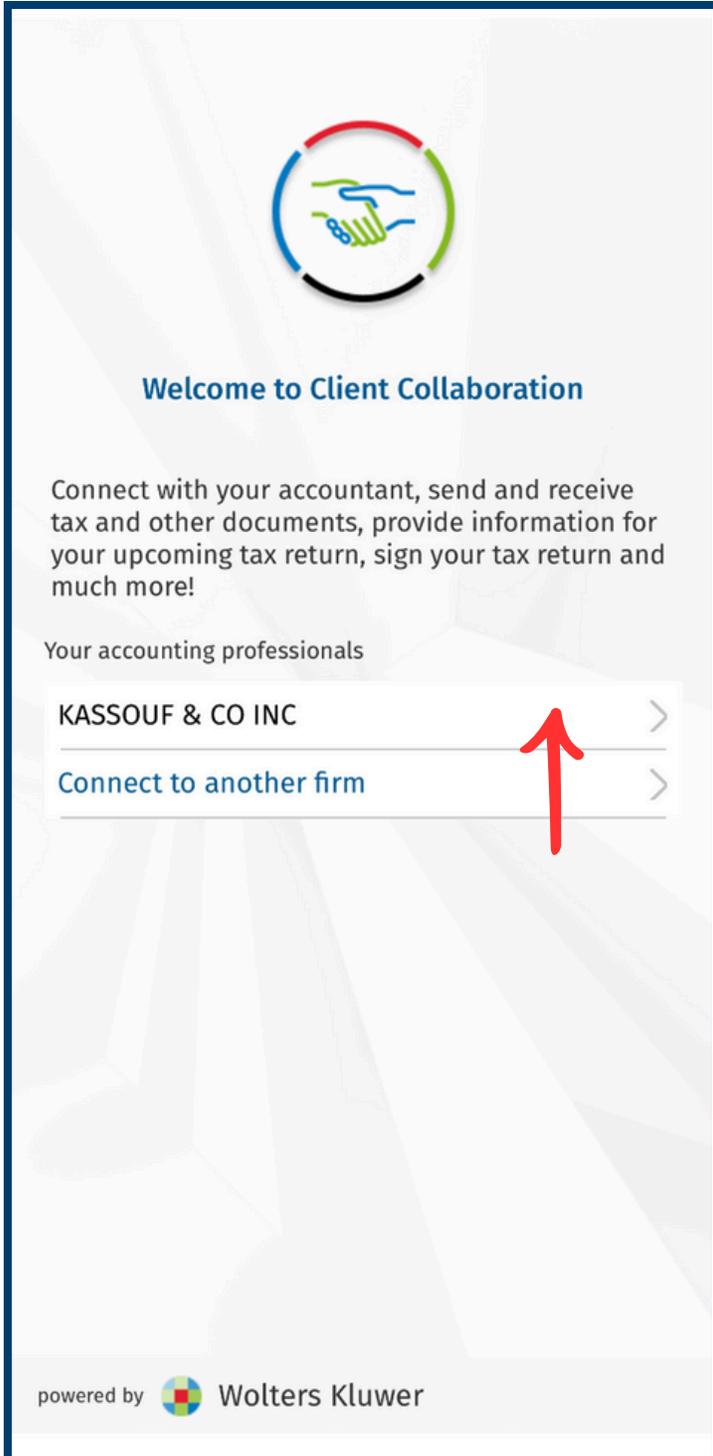
1 You will receive the following email to notify you your tax return and e-file authorization are ready.



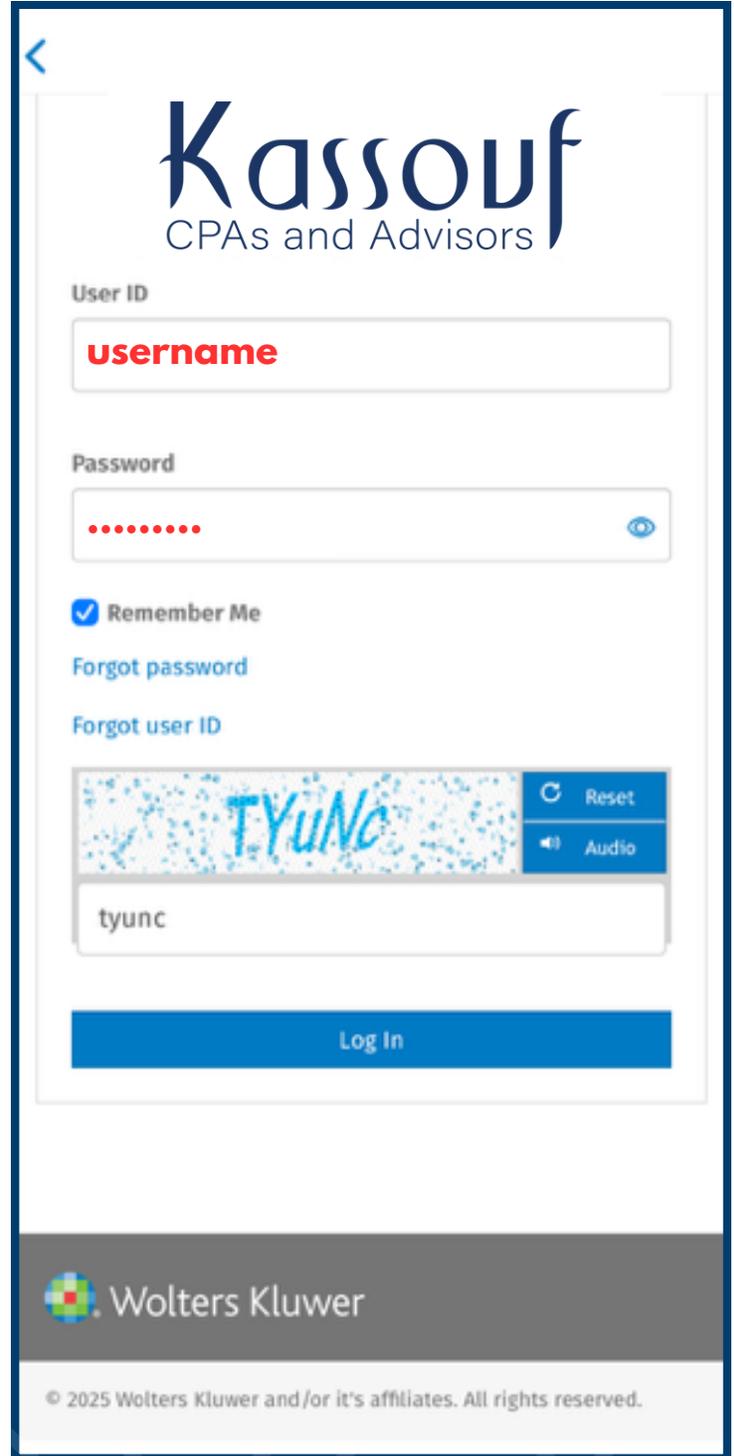
2 Click the “Click Here” button in the email. It will take you to the Client Collaboration Hub login.



3 Log in the Client Collaboration Hub with your user ID and password. Verify your identity through text, email, or voice.



The image shows the 'Welcome to Client Collaboration' screen. At the top is a circular logo with two hands shaking. Below the logo is the heading 'Welcome to Client Collaboration'. The main text reads: 'Connect with your accountant, send and receive tax and other documents, provide information for your upcoming tax return, sign your tax return and much more!'. Underneath, it says 'Your accounting professionals' and lists 'KASSOUF & CO INC' with a right-pointing chevron. Below that is a link 'Connect to another firm' also with a chevron. A red arrow points to the 'KASSOUF & CO INC' entry. At the bottom left, it says 'powered by Wolters Kluwer' with the company logo.



The image shows the login screen for 'Kassouf CPAs and Advisors'. It features a back arrow in the top left. The title 'Kassouf CPAs and Advisors' is at the top. Below are input fields for 'User ID' (containing 'username') and 'Password' (with a masked password and an eye icon). There is a checked 'Remember Me' checkbox, and links for 'Forgot password' and 'Forgot user ID'. A CAPTCHA area shows 'TYUNC' with 'Reset' and 'Audio' buttons. Below the CAPTCHA is an input field containing 'tyunc'. A large blue 'Log In' button is at the bottom. The footer includes the 'Wolters Kluwer' logo and the text '© 2025 Wolters Kluwer and /or it's affiliates. All rights reserved.'

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 Wolters Kluwer

Verify Your Identity
 For added security, we need to verify your identity.

How do you want to confirm your identity?

E-mail to

Text message to
Message and data rates may apply

Voice message to

This code will expire in 5 Minute(s)

<

 Wolters Kluwer

Verify Your Identity
 For added security, we need to verify your identity.

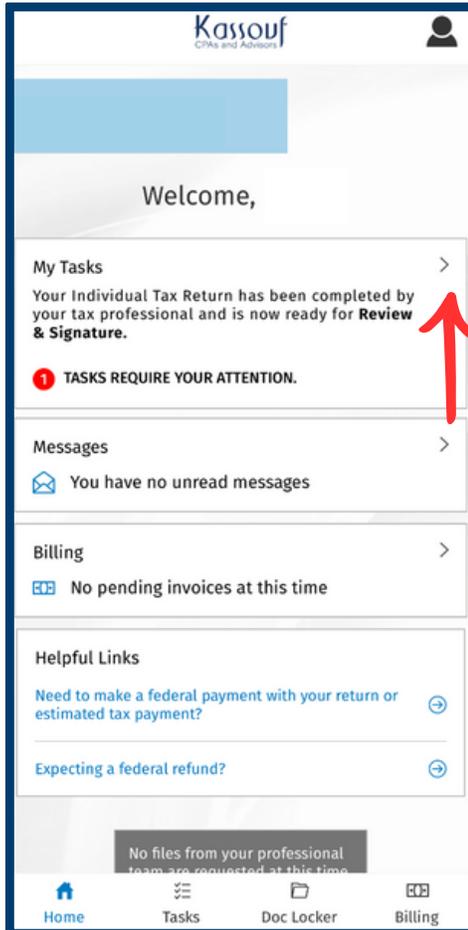
Enter the code

Didn't get the code? [Resend](#)

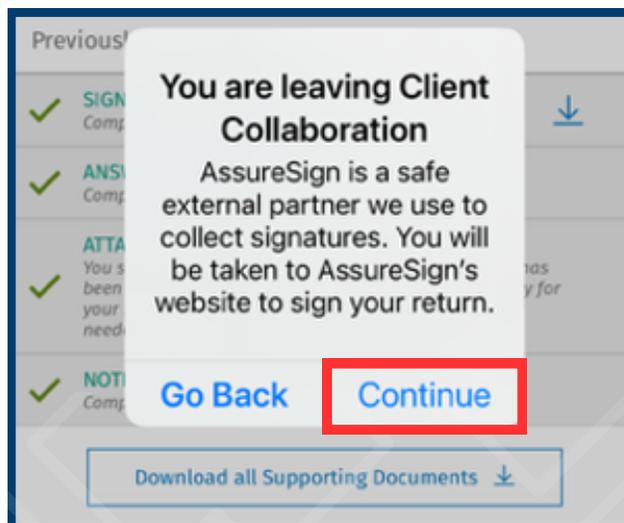
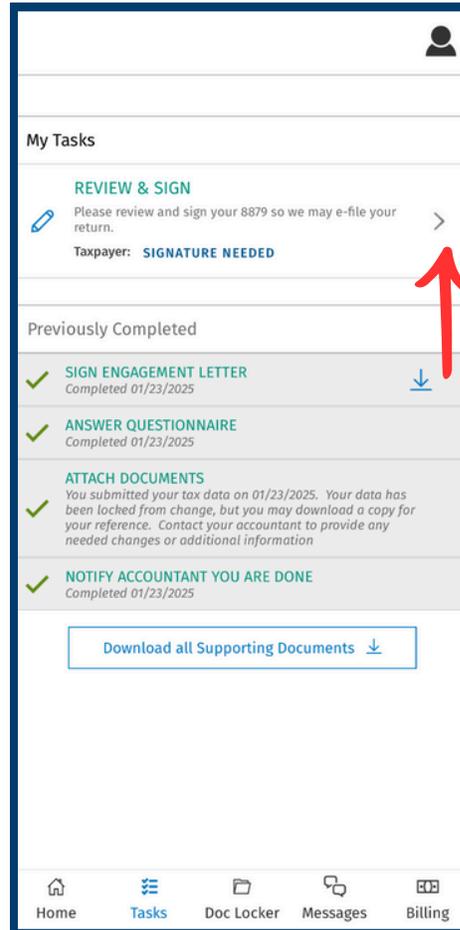
Trust this device for 30 days
Uncheck if this is a public device

4 Once logged in, you will see the first screen below. Click on “My Tasks.” It will take you to a second screen where you can sign required documents. Click “Review & Sign.” You will be asked to leave Client Collaboration to AssureSign. Click “Continue.”

First Screen:



Second Screen:



5 At the AssureSign page, answer your KBA questions. Once you have successfully answered the questions, you will be given a password. Save this password. You will need it to log back in, should you not complete the e-sign at your initial login. Click “Continue.”

The screenshot shows a mobile application interface for Nintex AssureSign. At the top left is a back arrow. The header displays the logo for "Kassouf CPAs and Advisors" and the company name "Kassouf & Co., Inc.". A green message box states: "Thank you. Your identity has been verified successfully and you may now access the document for signing." Below this is a blue "Important" message box: "Important: Please make note of this password now as it will be required in order for you to access the document if you do not complete signing at this time. You may also change this to a password of your choosing if desired." A "Password*" label is positioned above a text input field containing the number "45736". To the right of the input field is a grey "Continue" button. At the bottom left is the text "Nintex AssureSign". At the bottom right are the links "Terms of Use" and "Privacy Policy". A red arrow points upwards from the bottom right towards the "Continue" button.

7 Once you complete signing, submit your forms by clicking the “Submit” button. After you submit, you will be taken back to the Client Collaboration Hub. You will have an option to download the signed return by clicking the “Download Return” button. This file will also be available in your document locker in the Client Collaboration Hub.

You're almost done.

You have entered all requested information and signatures. When ready, select **Submit** to complete the signing process.

[Back](#) [Submit](#)

2024US IAAAtest \ ◊

2 ◊ of 26

Part II
Estimated Payments

Part III
Return and Payment Information

Part IV
Declaration of Taxpayer

Part V
Declaration of Electronic Return

Actions

Nintex AssureSign [Terms of Use](#) [Privacy Policy](#)

My Tasks

Nice job!
You're done with tasks!

Previously Completed

- ✓ **SIGN ENGAGEMENT LETTER**
Completed 01/23/2025 [↓](#)
- ✓ **ANSWER QUESTIONNAIRE**
Completed 01/23/2025
- ✓ **ATTACH DOCUMENTS**
You submitted your tax data on 01/23/2025. Your data has been locked from change, but you may download a copy for your reference. Contact your accountant to provide any needed changes or additional information
- ✓ **NOTIFY ACCOUNTANT YOU ARE DONE**
Completed 01/23/2025
- ✓ **REVIEW & SIGN**
Completed 02/14/2025
Taxpayer: SIGNED 02/14/2025

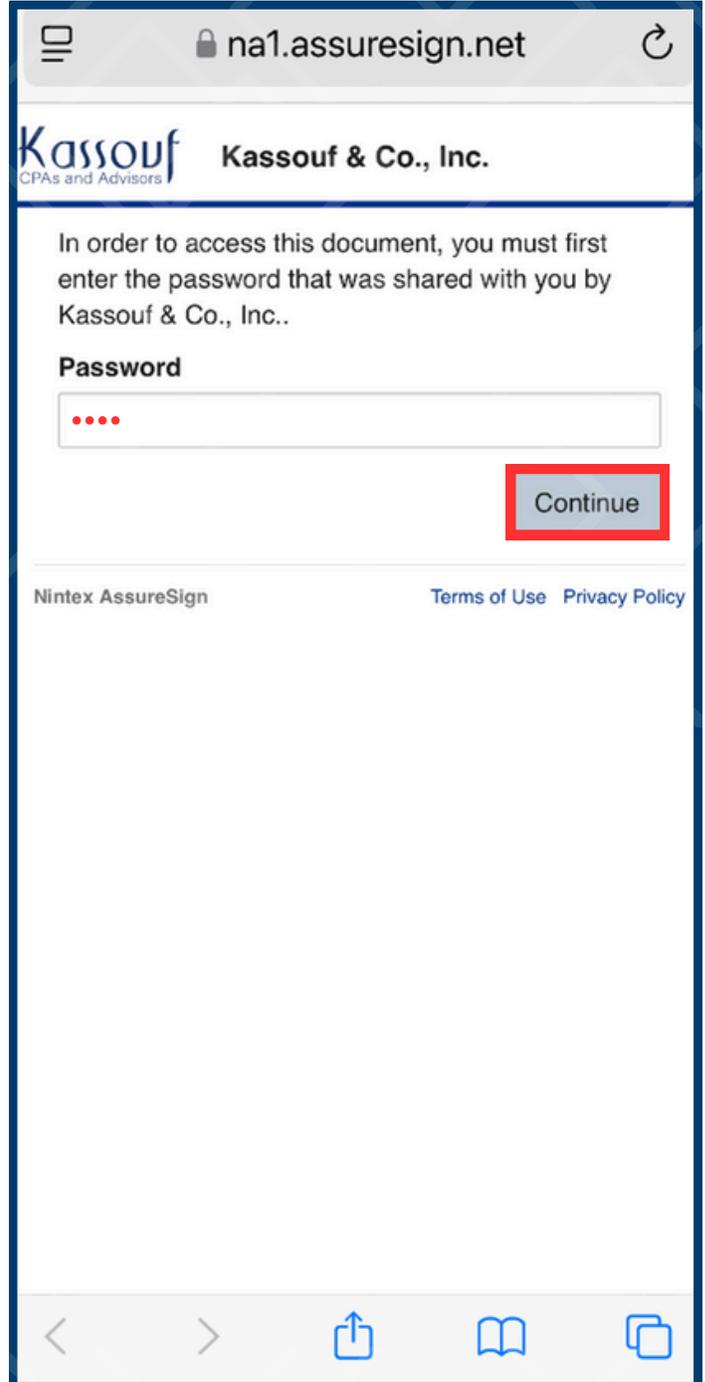
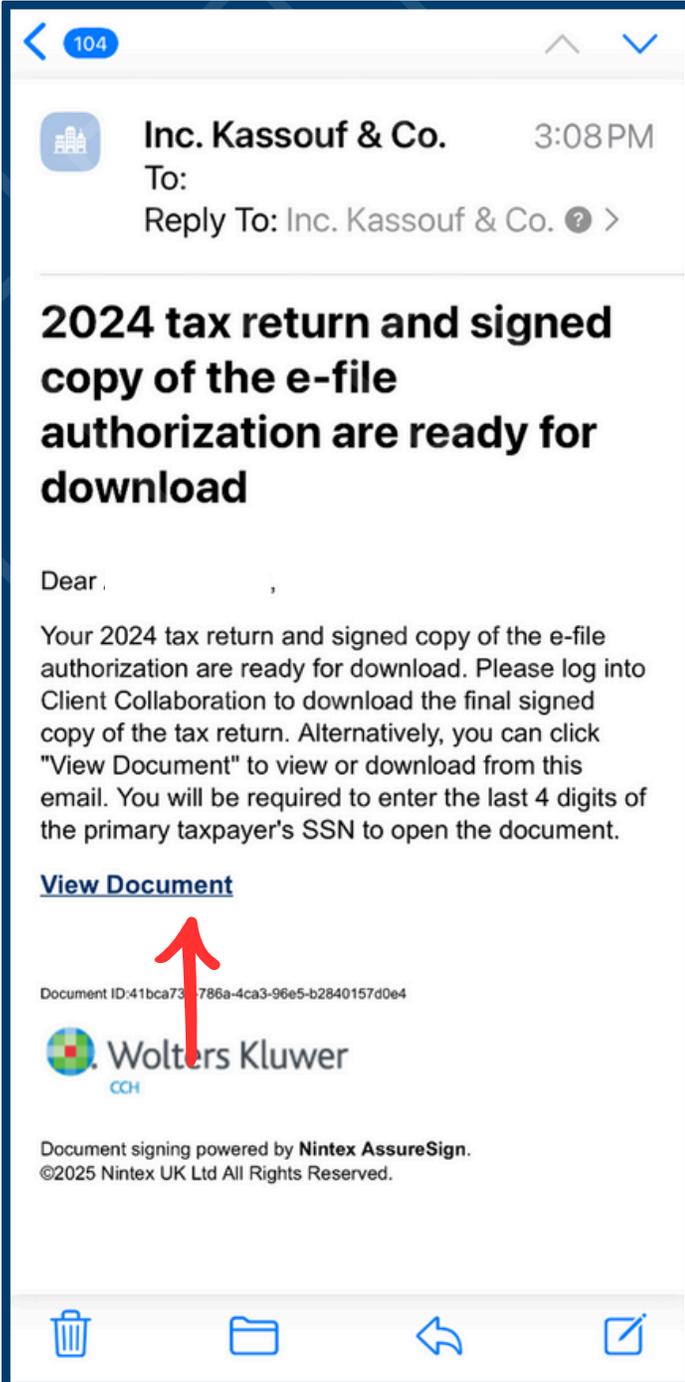
[Download return](#) ↓

[Download all Supporting Documents](#) ↓

Home **Tasks** **Doc Locker** **Messages** **Billing**

8

You will receive the following email and can access your return documents from that email. The email gives you a password you will need to open the document if you click "View Document." The password is the last four digits of your social security number.



9

If you input your password, you can choose to download the documents from here. You will see the following screens. If you are downloading from your phone, click the blue arrow in the upper left corner of your screen. It will take you to your downloads folder. The file will not automatically open. You will need to open it from the downloads folder.

