



Tax & Accounting North America

What's New for "My Account"

An introduction to
changes being made
to "My Account"

Over the next year, Wolters Kluwer is updating various internal systems for our Tax & Accounting Software customers in a phased approach, to improve your experience.

What's new:

1. When you renew your Specialty (non-Tax) products, Your 6-digit account number on your statement for that product will be changed over to a 10-digit account number. You will be notified of your new or updated account number.
2. "My Account" will give you a one-time notification.
3. You might be associated with multiple accounts if you have both Tax and non-Tax products from us.
4. As accounts are renewed, you will be notified again for each of the new accounts. As a result, you will need to register to log into your account to see your account information.
5. "My Account" is the support portal that all customers can utilize to manage their account. In your "My Account" profile, as your new accounts are added, you will have the option to pay bills and view online statements.

Please note that by specialty software, we are specifically referencing products not related to CCH Access™ Tax or CCH® ProSystem fx® Tax.

Current My Account Options

2. Select an Action

- [Change my address](#)
- [View my inventory](#)
- [View my invoice/billing statement](#)
- [Access my permission key or unlock codes](#)
- [Order tax mailing envelopes and supplies](#)

- **Change my address** — Same functionality for both Software and Research & Learning.
- **View my inventory** — Same functionality for both Software and Research & Learning.
- **View my invoice/billing statement** — Redirects to CCHGroup.com site. SSO needed to login.
- **Access my permission key or unlock codes** — Only for Software Accounts (6 digit).
- **Order tax mailing envelopes and supplies** — Only for Software Accounts (6 digit).

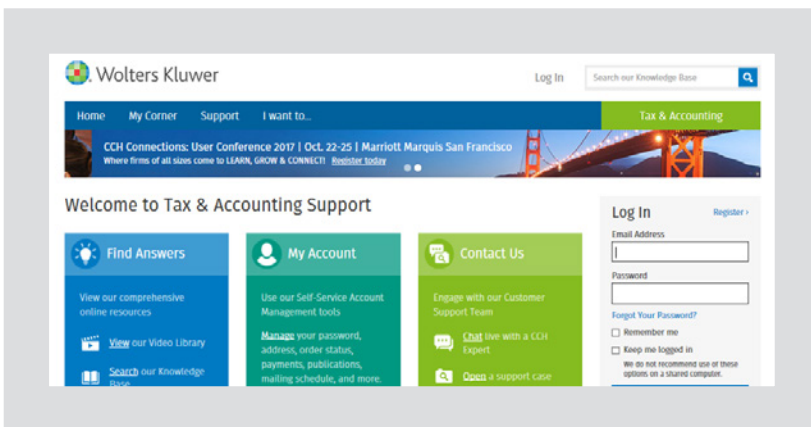
New My Account Options

2. Select an Action

Change my address
View my inventory
View my invoice/billing statement
Check my order status
Make a payment
Request report replacement
Return a publication
Review my standing orders
Access my permission key or unlock codes
Update mailing schedule

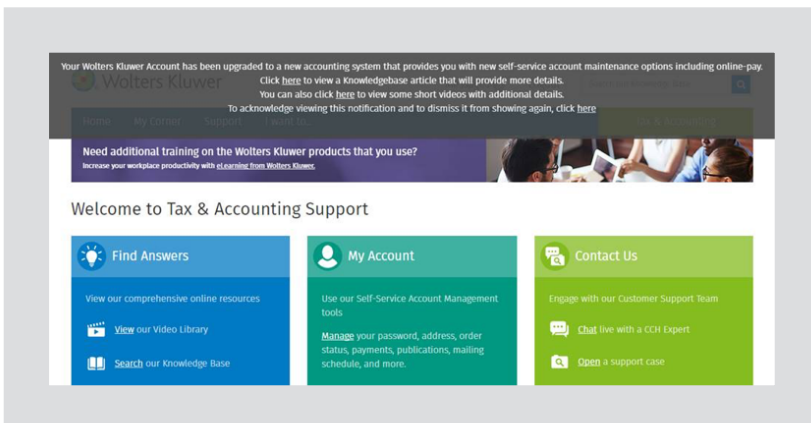
- **Change my address** — Same functionality for both Software and Research & Learning.
- **View my inventory** — Same functionality for both Software and Research & Learning.
- **View my invoice/billing statement** — Opens up SAP invoices on the support site.
- **NEW Check my order status** — Check order status for Research & Learning orders only.
- **NEW Make a payment** — Make a payment for SAP Accounts only
- **NEW Request report replacement** — Report request for Research & Learning only.
- **NEW Return a publication** — Return a Research & Learning order only.
- **NEW Review my standing orders** — Review a Research & Learning order only.
- **Access my permission key or unlock codes** — Only for Software Accounts (6 digit).
- **NEW Update mailing schedule** — Updated mailing schedule — Research & Learning only.

Steps for Upgrading Customer Accounts



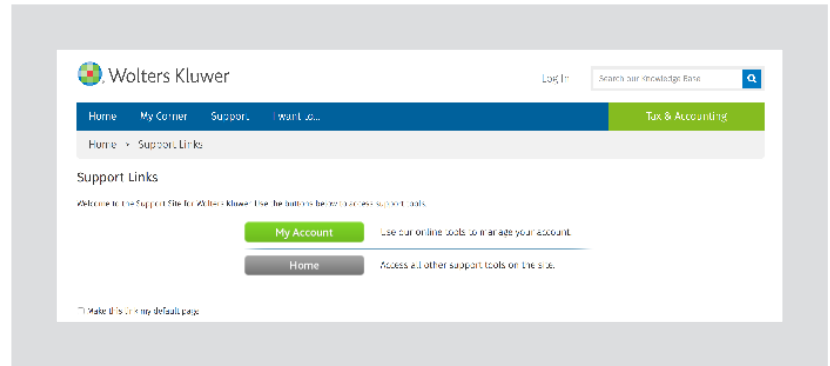
You may pay your bills via phone, by remitting payment in the mail, or by faxing in your payment information.

If you have never logged into the Support website, you'll need to register for a new login ID/password. Or, if you have forgotten your password, simply click on the corresponding link on the Support site.

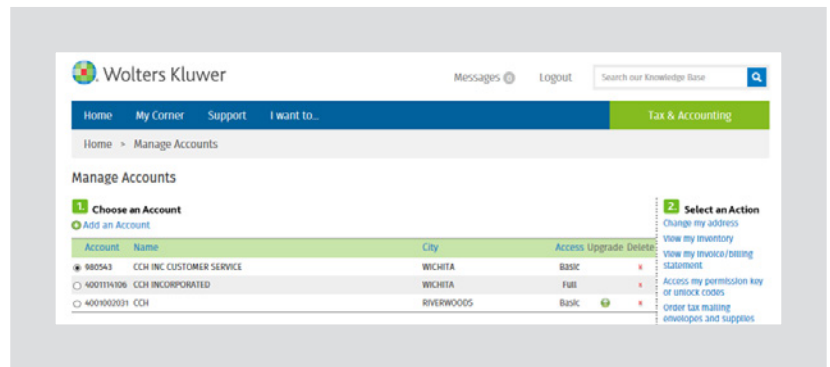


There are many ways to log into “My Account”. No matter which way you log in, you will see a pop-up screen directing you to view the “My Account” new features and videos. You will need to click “here” for the pop-up to go away.

Click on the “My Account” button.

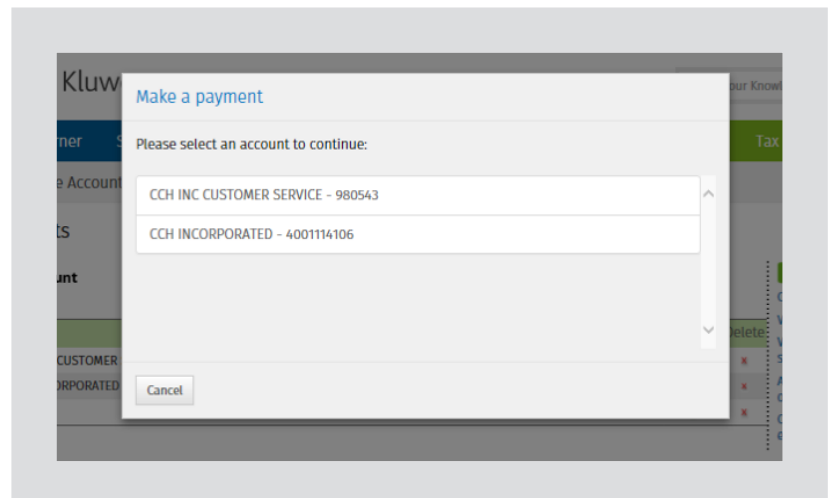


On the Manage Accounts page — as your non-Tax solutions reach their renewal dates — a green arrow button will appear under the upgrade column. Each new (10 digit) account will need to be upgraded from a basic (10 digit) account to a full account (10 digit) to take advantage of all of “My Account’s” new features, such as online bill pay.



Note: You will need your old account number or order number to enter into a pop-up verification box to be able to pay your bill.

Only new (10 digit) and upgraded full accounts will be able to pay online or use other new “My Account” features.



When the you press the green up arrow, you will receive a pop-up as shown to the left. You will need to have an invoice number or an order number to pay your account online.

How to Get to “My Account” FAQs

Home > Knowledge Base

My Account: Frequently Asked Questions

1. How do I register for access to My Account?
2. How do I sign in to My Account?
3. What is included in My Account Basic Access? (Wolters Kluwer) (ProSystem fx)
4. What is included in My Account Full Access? (Wolters Kluwer accounts only)
5. How do I increase my access level from Basic to Full Access? (Wolters Kluwer accounts only)
6. How do I add an account to my profile?
7. How do I edit my My Account profile?
8. How do I change my My Account password?
9. How do I choose a secure password?
10. How to use My Account self-service tools:
 - Change my address
 - View my inventory (Wolters Kluwer) (ProSystem fx)
 - View my invoice/billing statement
 - Check my order status
 - Make a payment
 - Return a publication
 - Review my standing orders
 - Access my Permission Key or Unlock Codes
 - Update Mailing Schedule

- Log into Support.CCH.com
- Access the “My Account: Frequently Asked Questions” article at: <https://Support.CCH.com/kb/solution.aspx/rp367>

If you have any questions, please call us at 800-739-9998, option 2, option 1, option 1 or visit Support.CCH.com.

