



Customize How You
Organize and Deliver Tax
Returns for Clients

Tax & Accounting

Introducing Batch Print Set Utility for CCH Axcess™ Tax

Batch Print Set Utility is a convenient new feature that allows tax professionals to customize the organization and delivery of tax returns for clients, while allowing firms to be more efficient in creating the deliverables. You can now prioritize the most important PDF pages up front — while simultaneously separating PDFs to make finding specific forms easier for clients.

Reasons to Consider Using Batch Print Set Utility

In your current tax prep and compliance workflow, chances are you're doing extra work to organize client deliverables. Batch Print Set Utility lets you streamline your print jobs when using multiple print sets. The utility leverages the normal Tax Batch Printing functionality, while also adding the ability to print the same set of returns with multiple print sets.

Increase Efficiency When Preparing Final Client Copies

If you spend time bookmarking, moving or deleting pages from a standard return PDF, this new offering will help streamline that process. It can typically be accomplished using print sets to delete or move pages, but sometimes multiple print sets are needed to achieve the desired results.

The Batch Print Set Utility can help improve the process by printing the returns with those multiple print sets and combining the files for you. This allows you to give one PDF to clients, requiring at least half the work than your current manual processes.

Enhance Your Brand by Delivering a Better Presentation of the Client Tax Return

You can always leverage the standard print organization that's produced by CCH Axcess Tax. While all the necessary forms are present, larger returns can be overwhelming for clients to review – something that becomes even more apparent when clients need to sign and return electronic filing authorization forms for multiple tax authorities, as clients can miss one or more forms within the return. It's also evident when clients need a copy of their Federal return for financial purposes and they struggle to figure out which pages they should print from the entire document to get exactly what needs to be provided.

The Batch Print Set Utility can help break the return into multiple sections to produce a set of PDFs that will ease client confusion when trying to return electronic filing authorizations – or locate just the Federal return.

How Batch Print Set Utility Works

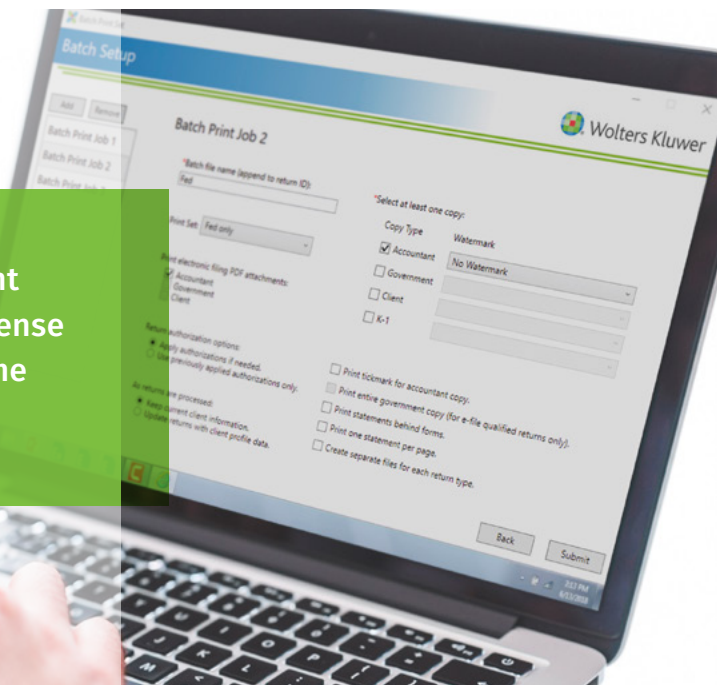
Users simply select a group of returns to print and set-up multiple print jobs for the selected returns for a single “session.” Each print job will support a single print set selection, just like normal batch print options. The utility also provides the option for combining the associated returns from the different batches into a single file or grouping the associated separate files into a client sub-folder.

Additional Features Supported by Batch Print Set Utility

Here are some additional details:

- Offers authentication support for both CCH Authentication and OAuth
- Allows for up to 50 returns to be selected per “session”
- Facilitates up to 10 batch jobs to be created for one “session”
- Tracks batch statuses and presents the status to the user
- Offers the following Output files:
 - Single file per return ID
 - Separate files per batch

Consider the many benefits Batch Print Set Utility offers and take steps to license the utility early so you have ample time to implement it for next tax season.



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For More Information on Print Sets Visit
Support.CCH.com/KB/Solution/000032434/SW23752

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