



CCH® My1040Data Toolkit

User Guide

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CCH Incorporated
20101 Hamilton Ave., Suite 200
Torrance, CA 90502

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Chapter 1

WELCOME TO CCH® MY1040DATA TOOLKIT

CCH My1040Data Toolkit is your firm's central hub for all CCH My1040Data Organizer-related activities. Your firm can create organizers for each client with CCH My1040Data Toolkit to assist in gathering current year information from each client. In addition, you can include your firm's branding, such as your company name, address, and logo.

After configuring your firm options and creating client organizers, the URL listed on the Home page can be used by your clients to access and utilize your personalized CCH My1040Data site.

Processing and System Requirements

Click the link to display details about the general use of CCH My1040Data as well as the system requirements. There are certain browser, monitor display, and printer settings that must be met to have access to all features.

Closing CCH My1040Data Toolkit

Remember to close CCH My1040Data Toolkit when you are finished making your changes. This saves your settings and prevents anyone from using the Back button on your browser to gain unauthorized access to the Toolkit.

 **Note:** If you leave CCH My1040Data Toolkit open, but do not make an entry for 20 minutes, you will be automatically logged out. This is an additional security measure to help guard against unauthorized access. All data will be saved. The next time you attempt to log in, a message will display.

Chapter 2

CHAPTER 2 - CONFIGURE FIRM

Configuring Firm Details

The information entered on the Firm Details page will display on your clients' CCH® My1040Data Toolkit. You may provide as much or as little information as you choose.

1. Select **Configure Firm > Firm Details** on the CCH My1040Data Toolkit toolbar.
2. Do one of the following:
 - **Add information.** Click in a box and enter your firm's information. Select the state abbreviation from the drop-down list.
 **Note:** If you provide a URL for your company, your firm name and firm logo (which you can provide on the [Firm Logo](#) page) will display on your clients' Organizer pages as a link to your company Web site.
 - **Delete information.** Click and drag to select text, and then press **Delete**.
3. Click **APPLY** to save your changes.

Configuring the Firm Logo

Logo for CCH® My1040Data Toolkit Login Page

If desired, upload a custom logo to display on the right side of the CCH My1040Data login page. It will also be a link to your company Web site, using the URL entered on the [Firm Details](#) page. (Any other company information entered on the Firm Details page displays below this logo.) The logo must follow these specifications:

- Saved as GIF file type.
- Image size cannot exceed 63 pixels high by 153 pixels wide.
- File size cannot exceed 100 kb.

To manage the logo for your clients' login page, select **Configure Firm > Firm Logo** from the My1040Data Toolkit toolbar, and do one of the following:

- **Upload a logo.** Click **Browse** to locate and open the image according to the file specifications, and then click **Upload New GIF**. This also replaces an image if one was previously uploaded.
- **Remove a logo.** Click **Remove GIF** to remove the logo that was last uploaded, and then click **OK** on the confirmation message. This option displays only after an image has been uploaded.



Tip: If your logo cannot fit the maximum dimensions without distortion, resize the logo as large as you can without exceeding either the width or height. Create a white background that will fill the remaining space to avoid image distortion.

Configuring Firm Options

Configure the CCH® My1040Data Toolkit options that will apply to all of your firm's clients.

1. Select **Configure Firm > Firm Options** on the CCH My1040Data Toolkit toolbar.
2. Select from the following options:
 - **Force clients to change their password the first time they access their Tax Organizer.** To add a level of security for your clients' information, they will be forced to change their password the first time they login. You have the option of turning this feature off.
 - This option applies to organizers created for both new and pro forma customers.
 - Changing this option will not change organizers already created.
 - **Receive an automatic e-mail notification when your client marks a CCH My1040Data Organizer complete.** Enter the e-mail address or addresses that should receive an e-mail notification with the client's name in the subject line when an Organizer is complete. If you want more than one person in your firm to receive notifications, we recommend that you create a group e-mail address; however, you may also enter individual e-mail addresses separated by commas.
3. Click **APPLY** to save your changes.

Configuring Client Access

Clients must have a user ID and password to access their CCH® My1040Data Toolkit organizer. The user ID and password are created by the staff who created the new CCH My1040Data organizer on the **Process > Create New Client Organizer** page, or are automatically generated when the staff creates the CCH My1040Data organizer from Pro Forma. The list of client information, which includes the user IDs and passwords, can be printed and used as needed by the firm.

Displaying a Client List

To display a client list, do the following:

1. Select **Configure Firm > Client Access** on the CCH My1040Data Toolkit toolbar.
2. Do one of the following:
 - **Display list by client ID or name.**
 - **Display a specific client.** To display only one client, click **ID** or **Name**, enter the complete client ID or client name, and click **Get List**.
 - **Search similar matches.** To display a list of similar clients, click **Name**, enter a partial first or last name, and click **Get List**. Client names that match the characters entered display.
 - **Display all records.** To display the entire list of clients' information created for your firm, accept *All* as the value for all filters, and click **Get List**.
 - **Filter records.** To restrict the list to clients' information associated with a particular office group or preparer, select a value from one or more filter lists, and click **Get List**.

Creating a File from the Client List

You can create a file from the client list that can be opened in a text editor, such as Notepad, or used with various mail merge programs to send user ID and password information to clients. Refer to your mail merge program documentation for additional information.

To save the information as an ASCII text (TXT) file, do the following:

1. Display a client list.
2. Click **Create File**. The file is created from the entire client list.
3. Do one of the following:
 - a. Click **Open** to open the file.
 - b. Click **Save**, browse to the location where you want to save the file, enter a file name, and click **Save**.

The file contains a header record to aid with the mail merge function. It also contains the following information delimited with the pipe symbol (|):

- Date Created
- Client ID
- Taxpayer First Name
- Taxpayer Last Name
- Spouse First Name
- Spouse Last Name
- Address
- Apt No
- City

- State
- ZIP
- User ID
- Organizer Password
- Preferred Email



Tip: Before you merge the TXT file, be sure that you have properly configured all fields in the destination program. If fields are not properly configured, some data, such as leading zeroes in numeric fields, may be lost or truncated.

Printing a List of Clients

To print a list of client detail, such as user ID and password, do the following:

1. Display a client list.
2. Do one of the following:
 - Click **Print This Page** to display a preview of the current client list page.
 - Click **Print All** to display a preview of all client list pages.
3. Click **Print**.
4. Select the print destination and, if needed, page range and number of copies, and then click **Print**.
5. Click **Close** to return to the Client Access page.

Unlocking a Locked Client Login

If a client enters a wrong password three times, the client is locked out of their CCH My1040Data.

To unlock client organizer access, do the following:

1. Select **Configure Firm > Client Access** on the CCH My1040Data Toolkit toolbar.
2. Display a client list.
3. Select one or more clients from the list and click **Unlock Client Login**. You can also click **Select All** to unlock all clients in the list.

Deleting Client Organizers

The Delete CCH® My1040Data Toolkit page allows you to delete Tax Organizers, one at a time or in multiples, from the list of Tax Organizers.

 **Warning!** Once a client's CCH My1040Data is deleted, it cannot be recovered.

To delete an Organizer, do the following:

1. Select **Configure Firm > Delete an Organizer** on the CCH My1040Data Toolkit toolbar.
2. Do one of the following:
 - **Display list by client ID or name.**
 - **Display a specific client.** To display only one client, click **ID** or **Name**, enter the complete client ID or client name, and click **Get List**.
 - **Search similar matches.** To display a list of similar clients, click **Name**, enter a partial first or last name, and click **Get List**. Client names that match the characters entered display.
 - **Display all records.** To display the entire list of Tax Organizers created for your firm, accept *All* as the value for all filters, and click **Get List**.
 - **Filter records.** To restrict the list to Tax Organizers associated with a particular office group, preparer, or status, select a value from one or more filter lists, and click **Get List**.
3. Select one or more organizers in the list.
4. Click **Delete**.
5. Review the organizers that are selected for deletion and, if needed, clear any organizers you do not want deleted.
6. Click **Confirm Delete** to permanently remove the selected organizers.

 **Note:** If the Tax Organizer has been modified, a warning displays, allowing you to cancel or proceed with deleting the client organizer.

Printing a List of Deleted Organizers

To print a list of deleted Tax Organizers, click **Print a List of Deleted Organizers** at the bottom of the page.

Creating Tax Organizers for Existing Clients

The Process tab allows you to create Pro Forma Organizers for a particular client or a group of clients.

To create Organizers for existing clients, do the following:

1. Create Pro Forma files for the desired clients in Production Processing.
2. Select **Process > Create Organizers for Pro Forma Clients** on the CCH® My1040Data Toolkit toolbar.
3. To apply the Pro Forma configuration to a client or list of clients, do one of the following:
 - a. **Display all records**. To display the entire list of returns created for your firm, accept *All* as the value for all filters, and click **Get List**.
 - b. **Filter records**. To restrict the list to returns associated with a particular office group, preparer, or organizer status, select a value from one or more filter lists, and click **Get List**.
4. Select one or more clients from the list and click **Create Organizer**. You can also click **Select All** to create organizers for all clients in the list. Data from the selected returns will transfer to the organizers.

Creating Organizers for New Clients

The Process tab allows you to create Tax Organizers for new clients with no pro forma data.

To create organizers for new clients, do the following:

1. Select **Process > Create New Client Organizer** on the CCH® My1040Data Toolkit toolbar.
2. Enter the client information for the CCH My1040Data organizer.

 **Notes:**

- The user ID must be 4-25 characters.
 - First and last name, User ID and Password are required.
 - The password must be 8-12 characters with no spaces and requires:
 - One number
 - One upper case letter
 - One lower case letter
 - Must not be the same as user ID
 - Special characters are allowed in the password but are not required.
 - Selection of a Preparer and Office Group are optional.
3. Click **Create Organizer** to create the client's organizer, and then click **Close** on the confirmation message.

Status of Client Organizers

The Status tab allows you to track the status of client organizers. You can monitor CCH® My1040Data Toolkit processing by date, process completed, number of file attachments, and status. The client organizers can be viewed and printed, and CCH My1040Data processing status reports can be viewed and printed. A list can be displayed, based on your search criteria, of the current status of Tax Organizer client data.

To obtain a list of client organizers, do the following:

1. Select **Status > Status of Client Organizers** on the CCH My1040Data toolbar.
2. Do one of the following:
 - **Display list by client ID or name**
 - **Display a specific client.** To display only one client, click **ID** or **Name**, enter the complete client ID or client name, and click **Get List**.
 - **Search similar matches.** To display a list of similar clients, click **Name**, enter a partial first or last name, and click **Get List**. Client names that match the characters entered display.
 - **Display all records.** To display the entire list of Tax Organizers created for your firm, accept *All* as the value for all filters, and click **Get List**.
 - **Filter records.** To restrict the list to Tax Organizers associated with a particular office group, preparer, or status, select a value from one or more filter lists, and click **Get List**.

To Lock a Completed Organizer

1. When a taxpayer indicates they have completed answering all the questions and attaching all their documents on the **Review and Send** page, an email will be sent per the instructions on the **Firm Options** tab.
2. You can use the **Status of Client Organizers** page to view the client's data and attachments and determine if you are ready to begin processing the client's return.

3. When you are ready to prepare the return, change the status of the CCH My1040Data organizer to **Locked**. This will prevent the taxpayer from modifying the data without notifying you.
4. If necessary, the accountant can change the status back to **Organizer In Process** to allow the taxpayer to modify their entries or attachments.

Changing an Organizer Status

1. Select an organizer and click **Change Status** to display the Edit Organizer Status window.
2. Select a status from the New Organizer Status drop-down list.
3. Click **APPLY** to save your changes.



Note: A status of **Organizer Locked** prevents the taxpayer from modifying the organizer without notifying their accountant.

Viewing and Printing the Status

1. Select an organizer and click **Print Status** to open the status report.
2. Click **Print** to select the print destination and, if needed, page range and number of copies.

Viewing or Printing a Client Organizer

1. Select an organizer and click **Print Organizer**.
2. The client organizer opens in Adobe® Acrobat®.

Viewing Attachments

1. Select an organizer that indicates there are attachments and click **View Attachments**.
2. The attachment report for the selected taxpayer will display: the section of the program where the item was attached, the file name, the type of file, the date it was uploaded and the file size.
3. You can open and view attachments individually or you can save single or multiple files directly to a local computer or server.
4. Downloaded files will be included in a single ZIP file.

Reviewing Processing History

The Status tab allows you to review and print CCH® My1040Data Toolkit processing history. You can sort processing history by date, process type, number of files processed, process results, and status. The client Organizer and Toolkit processing status reports can be viewed and printed. Using Adobe Acrobat, you are able to view and print your client's Tax Organizer. A list can be displayed, based on your search criteria, of the current status of Tax Organizer client data.

To review processing history, do the following:

1. Select **Status > Toolkit Processing History** on the CCH My1040Data toolbar. The page shows the following details:
 - Date of last activity
 - Process type
 - Number of files processed
 - Process results (Status)
 - Process status (Comments)
2. Change the number of entries to display in the list, if needed.

Displaying Status Detail

The Status column will display the following:

- Success
- Failure
- Partial Success

Details about a Failure or a Partial Success will display in the Comments column.

Printing Processing History

To print a list of processing detail:

1. Do one of the following:
 - Click **Print This Page** to display a preview of the current list page.
 - Click **Print All** to display a preview of all list pages.
2. Click **Print**.
3. Select the print destination and, if needed, page range and number of copies, and then click **Print**.
4. Click **Close** to return to the CCH My1040Data Toolkit Processing History page.

Using Get List to View Client Information

The Get List button populates the grid based on your selected filter criteria.

To display a list of records, do one of the following:

- **Display list by client ID or name.**
 - **Display a specific client.** To display only one client, click **ID** or **Name**, enter the complete client ID or client name, and click **Get List**.
 - **Search similar matches.** To display a list of similar clients, click **Name**, enter a partial first or last name, and click **Get List**. Client names that match the characters entered display.

- **Display all records.** To display the entire list of clients created for your firm, accept *All* as the value for all filters, and click **Get List**.
- **Filter records.** To restrict the list to clients associated with a particular office group or preparer, select a value from one or more filter lists, and click **Get List**.

 **Note:** If possible, narrow your list by using Name, ID, or one or more filters before clicking Get List. A very long list may take several minutes to display.

Using Get List to Delete Organizers

The Get List button populates the grid based on your selected filter criteria.

To display a list of records, do one of the following:

- **Display list by client ID or name.**
 - **Display a specific client.** To display only one client, click **ID** or **Name**, enter the complete client ID or client name, and click **Get List**.
 - **Search similar matches.** To display a list of similar clients, click **Name**, enter a partial first or last name, and click **Get List**. Client names that match the characters entered display.
- **Display all records.** To display the entire list of Tax Organizers created for your firm, accept *All* as the value for all filters, and click **Get List**.
- **Filter records.** To restrict the list to Tax Organizers associated with a particular office group, preparer, or status, select a value from one or more filter lists, and click **Get List**.

 **Note:** If possible, narrow your list by using Name, ID, or one or more filters before clicking Get List. A very long list may take several minutes to display.

Using Get List to Create Organizers for Existing Clients

The Get List button populates the grid based on your selected filter criteria.

To display a list of records, do one of the following:

- **Display list by client ID or name.**
 - **Display a specific client.** To display only one client, click **ID** or **Name**, enter the complete client ID or client name, and click **Get List**.
 - **Search similar matches.** To display a list of similar clients, click **Name**, enter a partial first or last name, and click **Get List**. Client names that match the characters entered display.
- **Display all records.** To display the entire list of Tax Organizers created for your firm, accept *All* as the value for all filters, and click **Get List**.

- **Filter records.** To restrict the list to Tax Organizers associated with a particular office group, preparer, or status select a value from one or more filter lists, and click **Get List**.



Note: If possible, narrow your list by using Name, ID, or one or more filters before clicking Get List. A very long list may take several minutes to display.

Using Get List to Access Client Organizer Status

The Get List button populates the grid based on your selected filter criteria.

To display a list of records, do one of the following:

- **Display list by client ID or name.**
 - **Display a specific client.** To display only one client, click **ID** or **Name**, enter the complete client ID or client name, and click **Get List**.
 - **Search similar matches.** To display a list of similar clients, click **Name**, enter a partial first or last name, and click **Get List**. Client names that match the characters entered display.
- **Display all records.** To display the entire list of Tax Organizers created for your firm, accept *All* as the value for all filters, and click **Get List**.
- **Filter records.** To restrict the list to Tax Organizers associated with a particular office group, preparer, or status, select a value from one or more filter lists, and click **Get List**.



Note: If possible, narrow your list by using Name, ID, or one or more filters before clicking Get List. A very long list may take several minutes to display.

Chapter 5

CHAPTER 5 - GENERAL USE

Windows® Display Properties

To adjust your Windows display properties, do one of the following:

Windows® 8

1. Right-click the background of your Windows® 8 desktop and select **Screen resolution** from the menu.
2. Select **Resolution** from the center of the screen. It is generally best if you use the recommended setting.

Windows® 7

1. Right-click the background of your Windows® 7 desktop and select **Personalize** from the menu.
2. Select **Display** from the bottom left side of the screen. Smaller is the default.

Adobe® Reader®

Windows®

To configure Windows® to open PDFs with Reader® or Acrobat®, do the following:

1. Right-click the PDF, and then select **Open With > Choose Program**.
2. Select **Adobe® Reader®** or **Adobe® Acrobat®** in the list of programs.
3. Select **Always Use The Selected Program To Open This Kind of File**.
4. Click **OK**.

Mac OS®

To configure Mac OS® X to open PDFs with Reader® or Acrobat®, do the following:

1. Click the PDF file's icon in the Finder to select it.
2. Select **File > Get Info**.
3. Click the triangle next to **Open With**.
4. Choose **Adobe® Reader®** from the **Open With** menu.
 **Tip:** If Adobe® Reader® is not on the list, select **Other** to display the option.
5. Click **Change All**.