CCH® My1040Data Process Overview

1. Firm Sets Up

1. Firm setup (logo, address, email) in Toolkit
2. Create My1040Data organizers
3. Provide credentials to clients

2. Client Completes

1. Login to My1040Data
2. Answer questions, enter info, attach docs
3. Add notes and submit to Firm

3. Firm Retrieves

1. Firm receives email notification
2. View completed organizer and attachments
3. PDFlyer prepares for Scan/AutoFlow