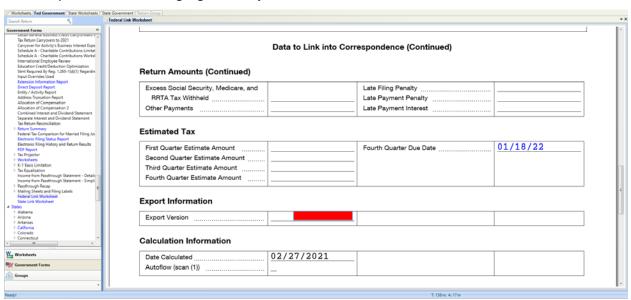# Create a DataScan to Identify Returns Affected by
the Minnesota M1NC Issue in CCH Axcess™ Tax

This document provides steps for creating the Datascan needed for the Minnesota M1NC issue. First, you must create the keywords within Tax. Then, you can build the scan using those keywords in Datascan.
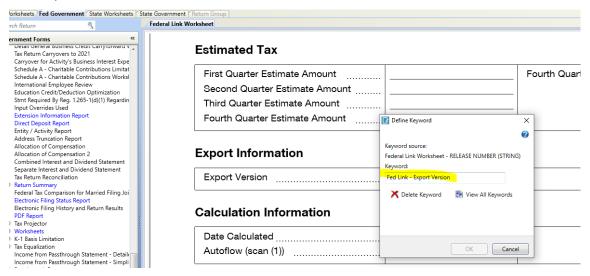
Creating Keywords

1. Log into CCH Axcess Tax.

2. Within Return Manager, open any 2020 Individual (1040) return.

3. Select the Fed Government tab.

4. On the last column to the right, select **Fed Link WS** and open.

5. Scroll down to the second page under the *Data to Link into Correspondence (Continued).* section.

6. Under Export Information, highlight the **Export Version** field
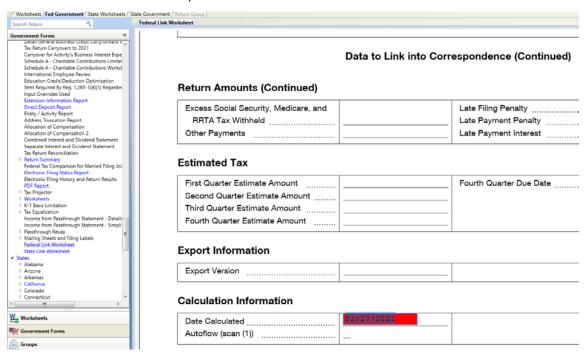

7. On the Manage ribbon, select **Define Keywords**.

8. In the Define Keywords window, type in a keyword to identify the field (example: Export Version).
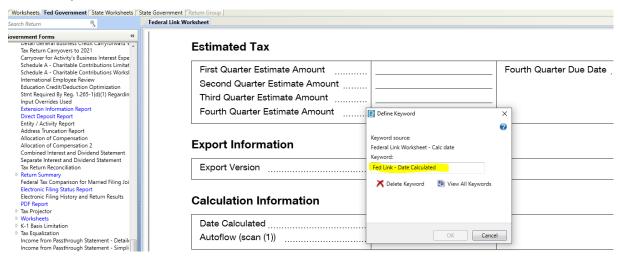

9. Click **OK**.

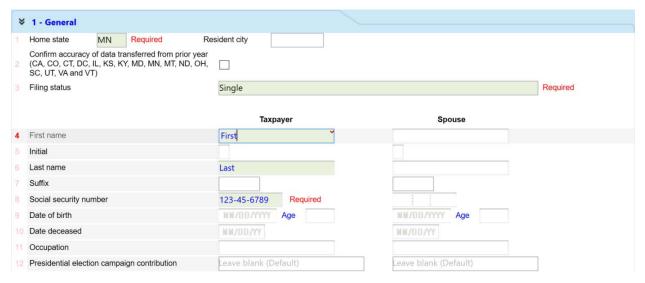10. Under Calculation Information, select the **Date Calculated** field.

11. On the Manage ribbon, select **Define Keywords**.

12. In the Define Keywords window, enter a keyword to identify the field (example: Date Calculated).

13. Click **OK**.

14. In the return, select **Worksheets > Federal> General > Basic Data > General**.

15. Create a keyword for the taxpayer's first and last name fields.

    a. Highlight line 4, First Name, and select **Define Keywords** on the Manage ribbon.

    b. Create the keyword, and then click **OK**.

    c. Repeat steps a and b for line 6.

16. In the return, select **Worksheets > Federal> General > Return Options > Preparer Information – Overrides Office Manager/RCS**.

17. Create a keyword for the preparer.

    a. Highlight line 12, Preparer Name, and select keywords on the Manage ribbon.

    b. Create the keyword, and then click **OK**.

Building/Executing the Datascan

1. In Dashboard, click Application Links, and then click **Datascan**.

2. Choose **New** to create a new scan.

3. Name the new Datascan in the Name field. Keep the default Search Type dropdown set to Management.

4. Under the available fields and forms section, make sure the following selections are made:

   - Source = Keywords
   - Year = 2020
   - Return Type = Individual
   - Tax Authority = FD
   - Category = Blank

5. Click **Go** to populate the keywords list.

6. From the Keywords list, find and highlight the key word that was created for the Date Calculated field in step 12 in the Creating Keywords procedure.

7. Click **Add to Criteria and Report**. The keyword is added to Criteria section at the bottom and to the Scan Report section to the right.

8. From the keywords list, find and highlight the key word that was created for the Export Version field in step 8 in the Creating Keywords procedure.

9. Click **Add to Criteria and Report**. The keyword is added to Criteria section at the bottom and the Scan Report section to the right.

10. With the same export version keyword highlighted, drag it down into the Criteria section, creating a second line with the keyword in it.

11. From the Keywords list, find the keywords that were created for the Taxpayer's name and Preparer in step 15 of the Creating Keywords procedure.

   - Select the keyword and click **Add to Report**. Do not add them to the Criteria.

   - Use the up and down arrows to the right of the Scan Report to arrange the report items.

12. In the *Available fields and forms* section, make the following selections:

- Source = Government
- Year = 2020
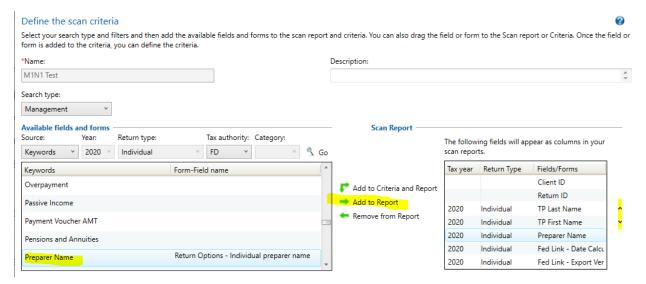- Return Type = Individual
- Tax Authority = MN
- Category = Blank

13. Click **Go**. The government forms list for Minnesota populates.

14. From the government forms list for Minnesota, scroll and highlight **M1NC – Federal Adjustments**, and click **Add to Criteria**.

15. Once all four criteria lines have been added to the bottom section, add the below fields/values to complete building the Datascan:

- Line 1: Date calculated keyword
  - Include = (blank)
  - Operator = <
  - Value = 02/28/2021
  - Connector = And

- Line 2: Export version keyword
  - Add outer bracket by clicking on the far-left column containing "{"
  - Include = Any
  - Operator = NP
  - Value = (blank)
  - Connector = Or

- Line 3: Export version keyword (2nd entry)
    - o Include = Any
    - o Operator = >=
    - o Value = 2020.02070
    - o Add outer bracket by clicking on the far-right column containing "}"
    - o Connector = And

- Line 4: M1NC – Federal Adjustment
    - o Include = (blank)
    - o Operator = P
    - o Value = (blank)
    - o Connector = (blank)

16. Verify the input, and then click **Save and Close**.

17. In Datascan, highlight the scan you just created and choose **Define Scope/Submit** on the Home ribbon at the top of the screen.

18. Under the Filter Criteria section of the Define Scope/Submit dialog box, there are two options:

- Scan All Returns

- Filter the returns to scan - Use this option for larger firms who need to search more specifically by Office.

Select a Filter Criteria, and keep the other options set to default.

19. Click **OK**.

20. In Datascan, locate the same scan and click on the spreadsheet icon under the Reports column. The Reports window should open and show the status of the scan.

21. Once the scan says "Completed," click the report icon in the window to open the scan in Microsoft Excel.

22. Click the **Results** tab at the bottom of the page to view the results of the Datascan, as shown on the following two pages.

File   Home   Insert   Page Layout   Formulas   Data   Review   View   Help

| Clipboard | Font | Alignment | Number | Styles |

Trebuchet MS   11   **B** *I* U

General

Comma   Comma [0]

Percent   Normal

Scan Name: M1N1 Test

	A	B	C	D	E	F	G	H	I	J	K	L	M	N

Scan Name: M1N1 Test

Scan Description:

Date: 06-Mar-2021

Criteria

{	{	Year	Return Type	Fields/Form	Include	Operator	Value	}	}	Connector
		2020	Individual	Fed Link - Date Calculated		<	02/28/2021			And
(		2020	Individual	Fed Link - Export Version	Any	NP				Or
		2020	Individual	Fed Link - Export Version	Any	>=	2020.02070		)	And
		2020	Individual	M1NC - Federal Adjustments		P				

Scope

Filters	Value
ReturnType	All
Region	All
Office	All
BusinessUnit	All
ReturnGroup	All
Signer	All
Show4DigitSSN	Excluded from scan

Password protected returns	Included in scan

General Information   Result   ⊕

A1   fx   Scan Name: M1N1 Test

	A	B	C	D	E	F
1	Scan Name: M1N1 Test					
2	Scan Description:					
3	Date: 06-Mar-2021					
4						
5	Client ID	Return ID	Fed Link - Date Calculated 2020	Fed Link - Export Version 2020		
6	M1NC_AllFields	2020I:M1NC_AllFields:V1	2/26/2021			
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						
31						
32						
33						
34						
35						
36						
37						
38						
39						
40						
41						
42						

General Information   Result   ⊕