


ATX™ Learning Portal


Central Office Manager (COM)

Customers who purchase ATX™ for multiple offices use Central Office Manager to set up additional offices, Add EFINs, and apply for Refund Settlement Solutions. Central Office Manager provides a cloud-based solution for managing offices from any location with an internet connection.

To access Central Office Manager:

1. Navigate to <https://com.cchsfs.com>.
2. Log in using your Client ID, the username *Admin*, and your password.

Client Login 

CLICK HERE
for Details on 2-Step Verification
(Multi-Factor Authentication) 


You are not authorized to use Centralized Office Management.

Client Login
Please login to your account by completing the form below

Client ID

Username

Password

User Verification ([what's this?](#))
 I'm not a robot 
reCAPTCHA
Privacy - Terms

WARNING: Three unsuccessful login attempts will lock your account
First time signing in?
[Forgot username or password?](#)

Password Requirements

- Must be at least 8 characters in length
- Must not exceed 100 characters
- Must contain at least one number
- Must contain at least one special character(#?!@\${}%^&*~)
- Must contain at least one upper case character
- Must contain at least one lower case character
- Case-sensitive
- Cannot contain the user name
- Cannot reuse any of your last 10 passwords
- Passwords expire every 90 days

User names and passwords used on this site are different from user names and passwords used in the desktop tax application. Each must be maintained independently.

 Your login credentials use the same password you use for ATX Solution Center.

3. Select the **I'm not a robot** check box, complete any additional reCAPTCHA prompts, and click **Login**.
4. Central Office Manager displays the Overview page.

Central Office Manager Help About Manage Users Logout
PID: 1 | Contract Year: 2022

OVERVIEW OFFICES REPORTS IMPORT TOOLS DOWNLOADS

Overview

[Add New Office\(s\)](#) [Export](#)

Office Information Graph

Year	Count
2022	~5
2021	~80
2020	~75
2019	~10

Office type: Active Offices

Attention

The Main Office must complete the settlement solutions provider application and be approved by that provider before any sub office application will be approved. Each office offering bank products must read and agree to the ERO Settlement Solutions Enrollment Agreement prior to the start of E-File. As the Main Office it is your responsibility to provide a copy of this agreement to your sub office. CCH SFS has the right to request a signed copy of this agreement at any time.

ERO Settlement Solutions

Click [here](#) for the Settlement Solutions Enrollment Application where you can view available providers, submit applications or check the status.

Office Information

EFIN

Office name:
Office Number:
Transmission Fee:
SB Fee:
Check Print Method:
Check Print EFIN:
Lo-Tech EFIN:
Registration Code:

Tasks

Task Status	Count
New	+
In Progress	
Complete	

- From this screen, you can add new offices, access the Reports tab, apply for ERO/Settlement Solutions and access tools to help manage your offices. Click the tabs along the top of the screen to navigate to the various pages.

Adding New Offices

To add an additional office:

- Click **Add New Office(s)**.

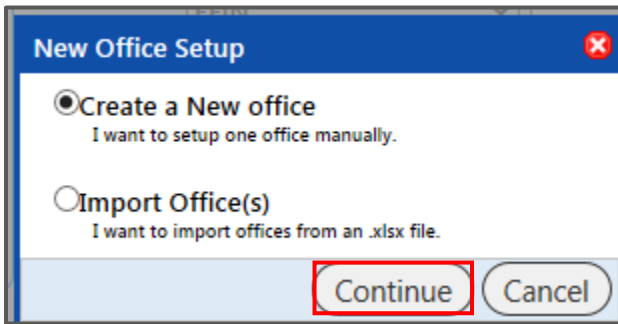
Central Office Manager Help About Manage Users Logout
PID: 1 | Contract Year: 2022

OVERVIEW OFFICES REPORTS IMPORT TOOLS DOWNLOADS

Overview

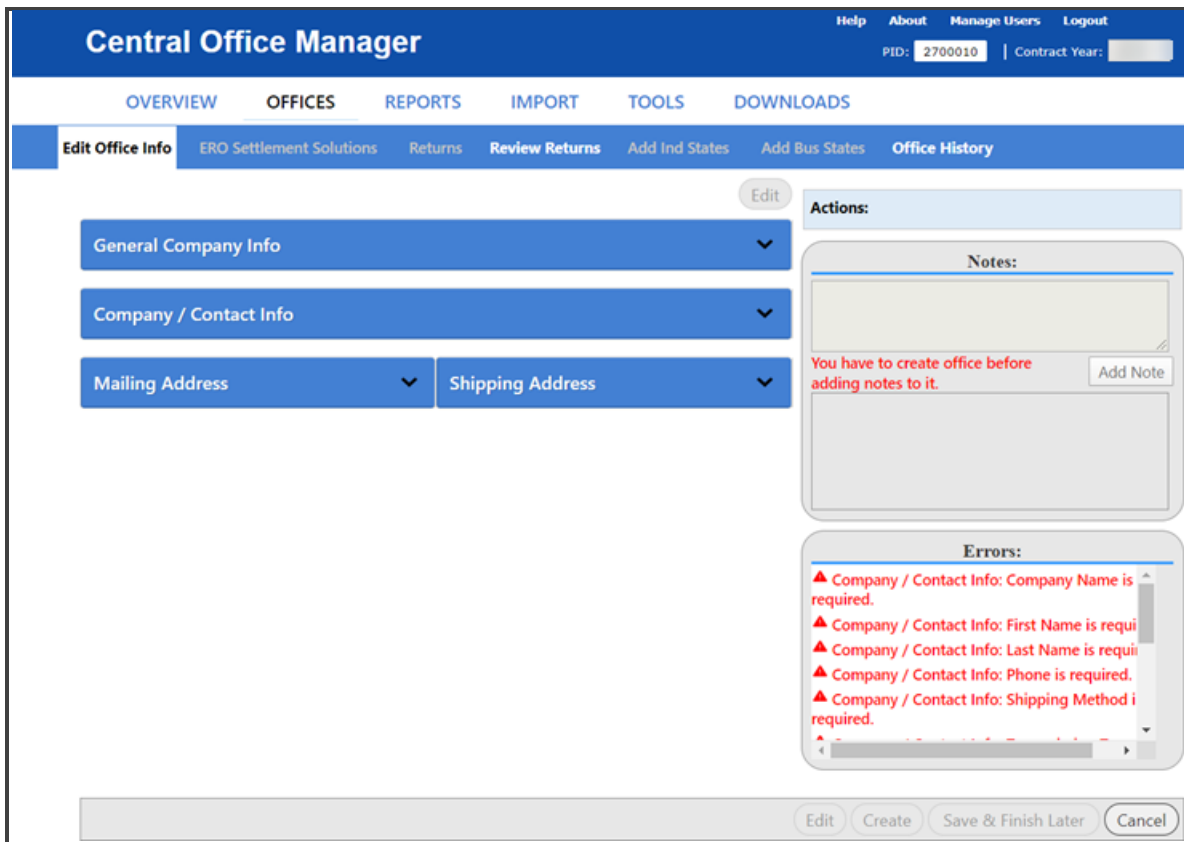
[Add New Office\(s\)](#) [Export](#)

2. Click Create a New office, and then **Continue**.



- i** If you are adding many offices, you can import the offices from a spreadsheet. The template to import offices is located on the **Download** page.

3. COM displays the **Edit Office Info** tab.



4. Expand each heading to complete the information for:
 - **General Company Info** – The information on this section is auto-populated once the Add Office or Add EFIN has been provisioned. You will retrieve the Client ID and activation code for this office or Add EFIN here.
 - **Company/Contact Info** – Complete company name and contact information. Wolters Kluwer will assign a fake EFIN to the account. Once the account is provisioned, come back and update this with the EFIN for this record.

- **Mailing Address and Shipping Address** – Complete offices mailing and Shipping Address.

i Fields with a red asterisk are required.

5. Once you have completed the required fields, click **Create**, or click **Save & Finish Later** to save the draft. Your Client ID and Activation Code for ATX automatically populate on the General Company Info page once Wolters Kluwer processes the information. This generally takes an hour or less.

Upload EFIN Letter

Once the office is active, you can edit and review the office information as needed. Remember that Wolters Kluwer assigns a fake EFIN, and this must be updated to reflect the IRS issued EFIN.

To do so:

1. From the Offices page, select the office name.

The screenshot shows the 'Central Office Manager' interface. At the top, there are navigation tabs: OVERVIEW, OFFICES, REPORTS, IMPORT, TOOLS, and DOWNLOADS. Below the tabs, there's a search bar with 'Find EFIN' and a search icon. A table lists offices with columns: EFIN, Office Name, Ofc Num, Contact Firstname, Contact Lastname, Status, Client ID, Reg Code, Act Code, and Tax Product. The first row is highlighted and has a red box around the 'Office Name' 'DOMINGO TAX SERVICES'. The second row is 'MARIA ATX.COM'. At the bottom right, there are pagination controls showing '10' items per page.

EFIN	Office Name	Ofc Num	Contact Firstname	Contact Lastname	Status	Client ID	Reg Code	Act Code	Tax Product
177505	DOMINGO TAX SERVICES	New! 1	MIGUEL	DOMINGO	Active	93015843			ATX
177467	MARIA ATX.COM	0	MARIA	RANGEL	Active	93015816			ATX

2. Click the arrow to expand the Company/Contact Info section.

The screenshot shows the 'Edit Office Info' form in the 'Central Office Manager'. The form has several sections: 'General Company Info', 'Company / Contact Info', 'Mailing Address', and 'Shipping Address'. The 'Company / Contact Info' section is expanded, and a red box highlights the 'Change' button next to it. There are also tabs for 'ERO Settlement Solutions', 'Returns', 'Review Returns', 'Add Ind States', and 'Add Bus'.

3. To change the EFIN, click the **Change** button.

General Company Info

Company / Contact Info

Company Name: DOMINGO TAX SERVICES EFIN: 177505

First Name: MIGUEL Lo-Tech EFIN:

Last Name: DOMINGO Regional EFIN:

Transmitting

4. COM displays the Upload EFIN Letter dialog box. Review the statements on the screen.
5. At the bottom, select the checkbox that you acknowledge that you have read, understand, and agree with the foregoing statements.
6. Verify the email address and click **Continue**.

Upload EFIN Letter

owner of such EFIN and the Account Holder.

5. I understand, and have communicated to any officers of the Account Holder, that any outstanding Records for the EFIN currently associated with this Account will no longer be available for processing and/or posting to electronic mailboxes once this EFIN change request becomes effective. These Records may include, but are not limited to, federal and state acknowledgements (ACKs), bank processing records such as deposit records, check print authorizations, and database update records.

6. I understand, and have communicated to the officers of the Account Holder, if any, that the EFIN Holder will be considered by CCH SFS and the IRS to be the sole authority over the Records, and that the EFIN Holder's custodianship of the Records will take priority over the Account Holder's in the circumstance of any dispute between the EFIN Holder and the Account Holder.

7. I hereby agree to indemnify and hold harmless CCH SFS from any and all liability to the Account Holder or the IRS that may arise in connection with me updating the EFIN on this Account under false, fraudulent, criminal or malicious purposes.

By checking the box and inputting my email address I acknowledge that I have read, understand and agree to the foregoing statements.

I Agree Signed by email:

7. Enter the EFIN, and then click the **Choose File** button.

Upload EFIN Letter

New EFIN:

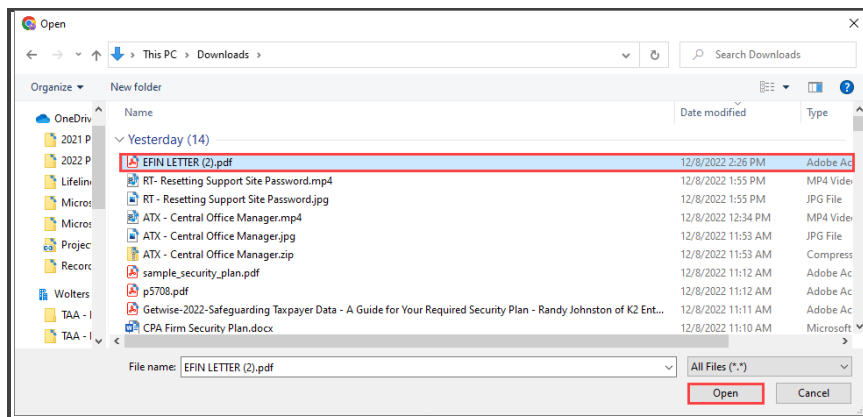
Title:

Description:

You must attach a copy of your IRS EFIN letter here.
Instructions: Click "Browse". A window will open to allow you to navigate the files on your computer. Browse to the folder where you have saved a copy of your EFIN letter, click on the file name and then click "Open" to attach the file. Finally, click "Upload File".

No file chosen

8. Locate and select the file, then click **Open**.



9. Once you have selected the file and it is visible on the dialog box, click **Upload File**.

Upload EFIN Letter [X]

New EFIN:

Title:

Description:

You must attach a copy of your IRS EFIN letter here.
Instructions: Click "Browse". A window will open to allow you to navigate the files on your computer. Browse to the folder where you have saved a copy of your EFIN letter, click on the file name and then click "Open" to attach the file. Finally, click "Upload File".

Selected file: EFIN Letter.pdf

10. Once the upload is complete, you will see a confirmation message on the screen. Click **OK** to exit.

Upload EFIN Letter [X]

New EFIN:

Title:

Description:

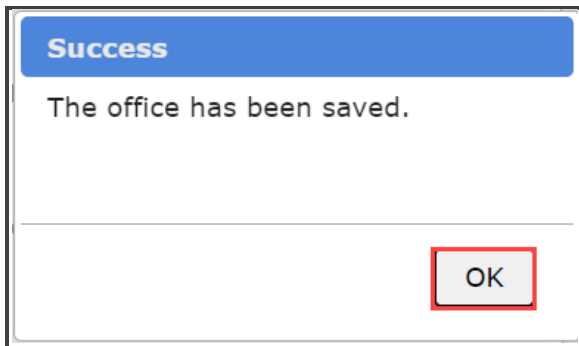
You must attach a copy of your IRS EFIN letter here.
Instructions: Click "Browse". A window will open to allow you to navigate the files on your computer. Browse to the folder where you have saved a copy of your EFIN letter, click on the file name and then click "Open" to attach the file. Finally, click "Upload File".

Selected file: EFIN Letter.pdf

Document successfully uploaded. You will receive an email once your request is completed.

11. This returns you to the Edit Office Info Page, click **Save Changes**.

12. Once the office has been updated, COM displays a confirmation message. Click **OK**.



Carry Forward

If rather than creating a new office, you want to carry forward an office from the prior year, you can do this from the Tools tab.

1. In the *Carry Office Data* section, select the appropriate year in the **from** and to drop down boxes, and select the year you are carrying this office from and to.
2. Click **Refresh Grid** to display the existing Add Office(s) and/or Add EFIN(s).

3. Select the check box of the office(s) to carry forward.
4. And click the **Carry Data** link.

Carry Office Data from 2021 to 2022 [Refresh Grid](#) [Fields Setup](#)

All 7 Active Offices have been selected.

[Clear Selection](#) [Carry Data](#)

EFIN	Office Name	Ofc Num	Client ID
<input checked="" type="checkbox"/> 177506	MAR FINANCIAL SERVICES	2	93015844

1 2 5 10 25 50 100 500 per page

- COM displays the *Please Wait* dialog box as the offices are carried forward. Once the process is complete, COM displays the *Carry Over Summary* dialog box to report the status of the carry forward. Click Close.

Carry Over Summary

Offices carried successfully: 1

Offices carried with errors: 0

All offices carried over successfully!

Close

The office will now be displayed in the Offices tab.

- i** The Add Office or Add EFIN will be set up using the prior year information. Select the office from the list to make edits once the system reflects the office as Active. Remember this normally takes 20-30 minutes but can take up to an hour.

Applying to Offer Refund Settlement Solutions

After you create an office, you can apply to offer refund settlement solutions with one of our banking partners.

- i** You must complete and submit the ERO Settlement Solution for your main office before submitting those for your add office(s)

To do this:

- From the Overview screen, click the link to open the **ERO Settlement Solutions Portal**.

Overview

Office Information Graph

Year	Count
2016	1
2017	1
2018	1
2019	1

Office type: Active Offices ▼

Attention

The Main Office must complete the settlement solutions provider application and be approved by that provider before any sub office application will be approved. Each office offering bank products must read and agree to the ERO Settlement Solutions Enrollment Agreement prior to the start of E-File. As the Main Office it is your responsibility to provide a copy of this agreement to your sub office. CCH SFS has the right to request a signed copy of this agreement at any time.

ERO Settlement Solutions

Click [here](#) for the Settlement Solutions Enrollment Application where you can view available providers, submit applications or check the status.

2. Download and review the **ERO Settlement Solutions Agreement** and verify your office information on this screen.
3. Select the checkbox indicating you agree to the terms, and then click **Continue to Enrollment**.

Provider Enrollment Portal Settlement Solutions

ERO Settlement Solutions Enrollment Agreement

Before enrolling, you must review and agree to the terms and conditions of the [ERO Settlement Solutions Enrollment Agreement](#)**

[Download Agreement](#)

* User Name:

* Client ID:

* EFIN:

I have read and agree to the terms and conditions**

[Continue to Enrollment](#)

4. Next, click **Get Started** to complete a little more information about your office, choose the banking partner you want to work with, and submit your application.



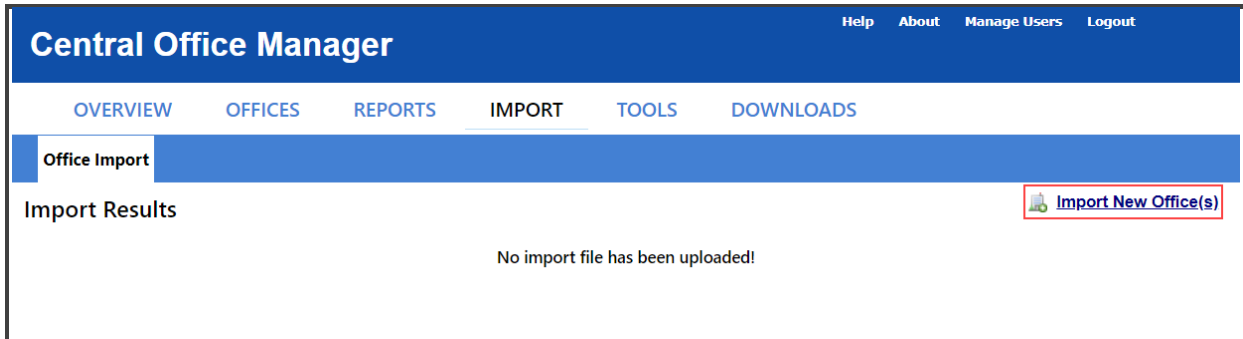
Reports

As an ATX customer, on the Reports tab you can access the ATX Product Activation Codes Report, to view the ATX Product Activation Codes for all your offices. You can display these on screen or export them to Excel.

The screenshot shows the 'Central Office Manager' interface. The top navigation bar includes 'Help' and 'About' links, and a 'PID: 890' indicator. The main navigation menu has tabs for 'OVERVIEW', 'OFFICES', 'REPORTS', 'IMPORT', 'TOOLS', and 'DOWNLOADS'. The 'REPORTS' tab is highlighted with a red box. Under 'Sub Office Management Reports', the link 'ATX Product Activation Codes' is highlighted with a red box. Other links in this section include 'TaxWise Registration Codes', 'My Transmission Types', 'Portal Details', 'Admin Password Resets Detail', and 'Admin Password Resets Summary'. The 'Customer Support Site' section contains links for 'Return Query', 'Online Reporting System', 'Support Site', and 'TaxWise Blog'.

Import

Imports tab is where you will go to import multiple offices from the spreadsheet you have created if you are importing a large group of offices.

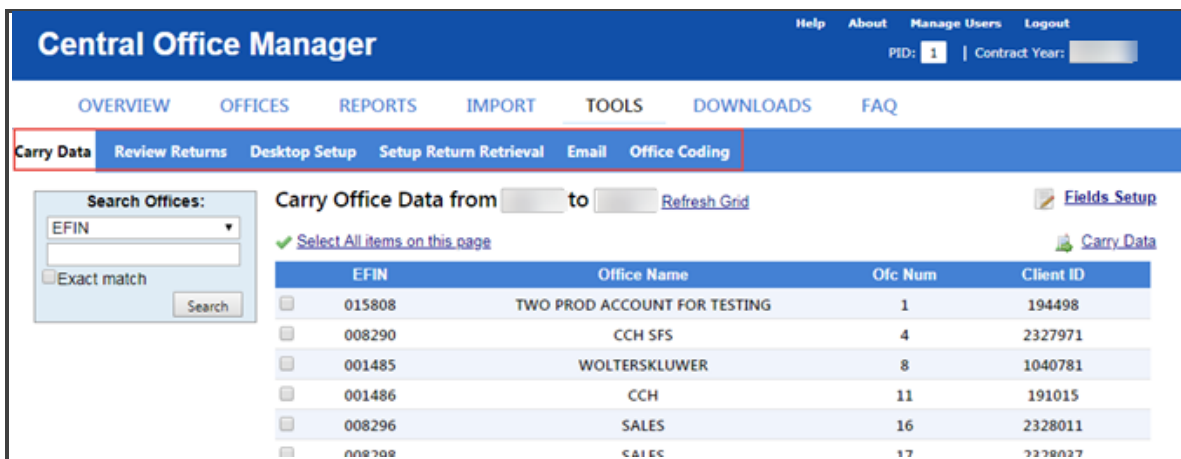


Tools

From the Tools page, you can carryforward data from the prior year of TaxWise into the current year for multiple offices at once. You can also review returns from multiple offices and send setup information to sub-offices. Pertinent to you as an ATX user are:

- **Carry Data** - The Carry Data feature gives you the ability to carry over tax year office data to another tax year. You can either carry the data forward or backward.
- **Setup Return Retrieval** - There are two methods of Return Retrieval. Which one you should use depends on the nature of your business. If you are a reseller, Return Retrieval gives the Main Office the ability to download returns e-filed by their Sub Offices. The use of this tool is reserved exclusively for the Admin user. If you are not a reseller, Return Retrieval requires two steps. EFIN Approval, and then Return Retrieval.
- **Email** - The Email feature allows a Main Office to create a mass email that can be sent to one or more Add Offices simultaneously.

1. Click the tabs along the top of the **Tools** page to view each section.



Downloads

On the Downloads page, you can find helpful resources broken down into two tabs. The documents tab includes templates for importing multiple offices. As an ATX customer, the TaxWise Updates tab does not apply.



Help

To view the Help files for COM:

1. Click the **Help** link at the top of the page.
2. COM displays the Help content on a new internet browser tab. Browse the table of contents or type a keyword to search.

