

ATX™ Learning Portal

Using Return Retrieval

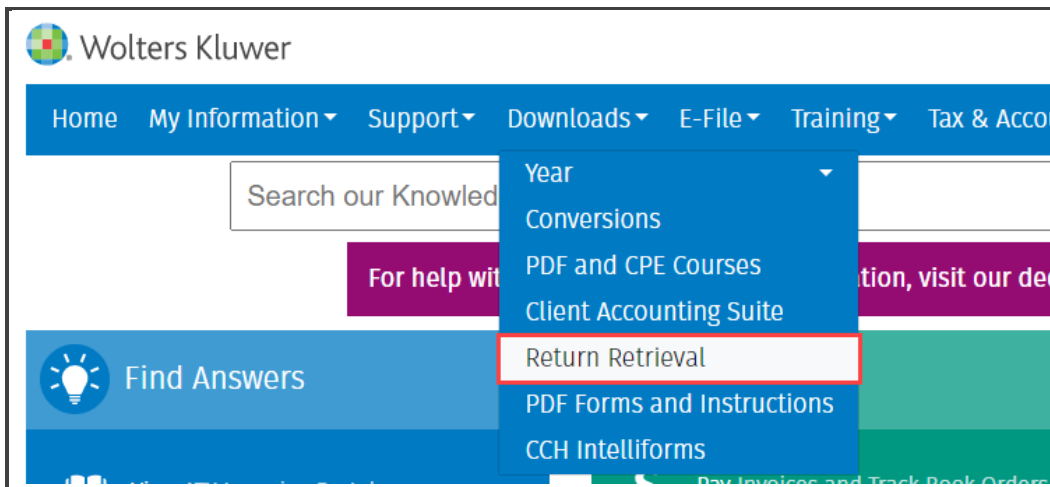
The Return Retrieval service available on the Solution Center allows you to retrieve current year and two prior years' returns that were successfully transmitted to our EFC. Return Retrieval is only available for federal and state e-filed returns for the following types: 1040, 1120, 1120S, 1065, 1041, 990 and 5500. Return Retrieval is only available for the active e-File years, which is the current year and 2 prior years.

i If you would like to purchase Return Retrieval, please contact your Account Manager at 1-877-728-9776.

Download Your Returns

To download your returns via Return Retrieval:

1. Go to ATX Solution Center at <https://support.atxinc.com/>
2. From the Downloads menu, select **Return Retrieval**.



3. If you have not already logged in, you will be prompted to enter your Client ID, username *Admin*, and current password. Once your credentials have been entered, click **Login**.

Client Login

Please login to your account by completing the form below


Client ID


Username

Password

Show Password

User Verification ([what's this?](#))

 I'm not a robot



reCAPTCHA
Privacy - Terms


WARNING: Five unsuccessful login attempts will lock your account

[Need Help logging in?](#)

[Forgot username or password?](#)

Remember Me

i If Return Retrieval is not currently part of your purchase, you will see a message stating that you are not authorized to perform this action. To purchase, contact your account manager.



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You are not authorized to perform this action

4. After your purchase, the first time you attempt to access the Return Retrieval feature, you will see the license agreement. Review the agreement on screen and to proceed, click **Accept**.

MyATX Support Center

Enter your search term here

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This feature will allow you to download tax returns prepared and listed under your company's account with CCH Small Firm Services. This feature is governed by the CCH Small Firm Services Standard License Agreement (as, from time to time, amended, modified or updated). All tax returns and the personal identifying information contained therein, are protected by federal privacy and disclosure laws. Most specifically, IRS SEC 7216 governs the disclosure and use of tax returns and requires that a preparer obtain the proper and specific signed consent from the taxpayer before that individual's return may be disclosed to a third party. In rare instances, an exception to the regulation may apply. By using this feature to obtain tax returns, you represent and warrant: that the proper consents have been obtained for each return you will download; or in the alternative, that you meet an exception under IRS SEC 7216. You further agree to indemnify and hold harmless CCH Small Firm Services, along with its affiliates, agents and representatives, from any claims, damages, and/or liability resulting from, or related to, your acquisition and / or use of the returns. This service is provided "as is" without warranty of any kind, express or implied.

Accept

- The page now displays Return Retrieval. Select the year for which returns need to be retrieved and click **Select**.

Select Year: 2022 Select

Search Returns by TIN: Search

Returns View: All Returns

Returns

Select All items on this page

	TIN	CID	Ofc #	Last
<input type="checkbox"/>	231-23-1231	93012373	1	3/6/2023
<input type="checkbox"/>	231-23-1232	93012373	1	3/6/2023
<input type="checkbox"/>	231-23-1233	93012373	1	3/6/2023
<input type="checkbox"/>	222-22-3223	93012373	1	3/6/2023

- Return Retrieval displays the returns that are available for the selected year. Select the individual returns you need to download or click the **Select All items on this page** option.

Select Year: 2022 Select

Search Returns by TIN: Search

Returns View: All Returns

Returns

Select All items on this page

Export Selected Returns

	TIN	CID	Ofc #	Last Download Date
<input type="checkbox"/>	231-23-1231	93012373	1	3/6/2023 1:54:47 PM
<input type="checkbox"/>	231-23-1232	93012373	1	3/6/2023 1:54:47 PM
<input type="checkbox"/>	231-23-1233	93012373	1	3/6/2023 1:54:47 PM
<input type="checkbox"/>	222-22-3223	93012373	1	3/6/2023 1:54:48 PM
<input checked="" type="checkbox"/>	244-24-4244	93012373	1	3/6/2023 1:54:48 PM
<input checked="" type="checkbox"/>	222-22-3224	93012373	1	3/6/2023 1:54:48 PM
<input type="checkbox"/>	212-21-2211	93012373	1	3/6/2023 1:54:48 PM
<input type="checkbox"/>	211-21-1212	93012373	1	3/6/2023 1:54:48 PM
<input checked="" type="checkbox"/>	222-22-3225	93012373	1	3/6/2023 1:54:48 PM

- Once the returns have been selected, click the **Export Selected Returns** link.

Returns

All 14 Returns have been selected.

[Clear Selection](#) [Export Selected Returns](#)

	TIN	CID	Ofc #	Last Download Date
<input checked="" type="checkbox"/>	231-23-1231	93012373	1	3/6/2023 1:54:47 PM
<input checked="" type="checkbox"/>	231-23-1232	93012373	1	3/6/2023 1:54:47 PM
<input checked="" type="checkbox"/>	231-23-1233	93012373	1	3/6/2023 1:54:47 PM
<input checked="" type="checkbox"/>	222-22-3223	93012373	1	3/6/2023 1:54:48 PM
<input checked="" type="checkbox"/>	244-24-4244	93012373	1	3/6/2023 1:54:48 PM
<input checked="" type="checkbox"/>	222-22-3224	93012373	1	3/6/2023 1:54:48 PM
<input checked="" type="checkbox"/>	212-21-2211	93012373	1	3/6/2023 1:54:48 PM

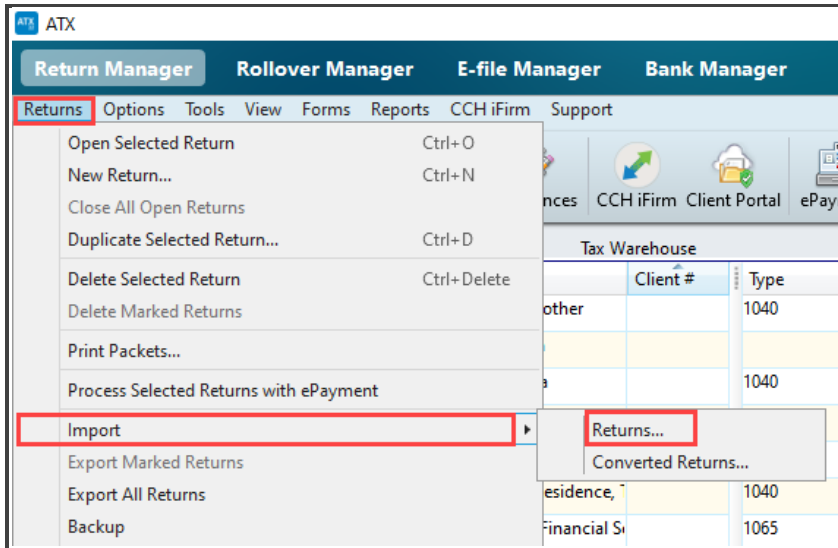
- Once the archived file has been created, your computer will open the zipped folder that was created. This will be located in your Downloads folder. The folder contains the files you will then use to import the returns into your program.

Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
Barnes, Karen.atx22Export	ATX22EXPORT File	1,284 KB	No	1,284 KB	0%	3/6/2023 3:32 PM
Broad Street Music Inc...atx22Ex...	ATX22EXPORT File	1,621 KB	No	1,621 KB	0%	3/6/2023 3:32 PM
Brown, Glen and Barbara.atx22E...	ATX22EXPORT File	1,247 KB	No	1,247 KB	0%	3/6/2023 3:32 PM
Collins, Brent.atx22Export	ATX22EXPORT File	1,229 KB	No	1,229 KB	0%	3/6/2023 3:32 PM
Creative Consulting.atx22Export	ATX22EXPORT File	1,514 KB	No	1,514 KB	0%	3/6/2023 3:32 PM
Disposition of a Business Asset ...	ATX22EXPORT File	1,607 KB	No	1,607 KB	0%	3/6/2023 3:32 PM
Duke, Andrea Latx??Fxnort	ATX22EXPORT File	1,864 KB	No	1,864 KB	0%	3/6/2023 3:32 PM

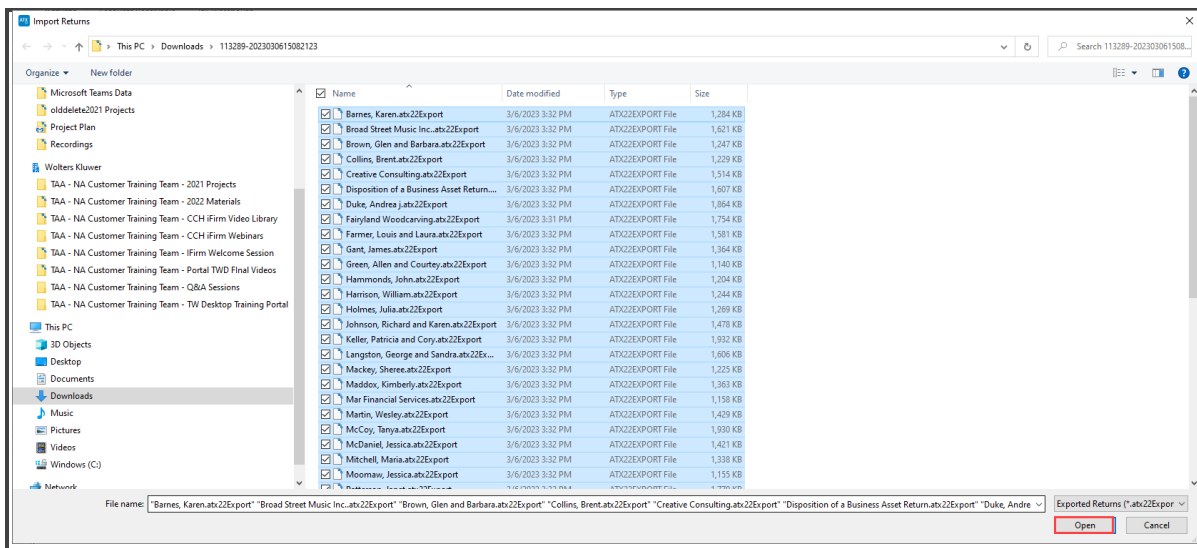
Import Returns

Once the returns have been downloaded from Return Retrieval, you will need to import them into your tax program.

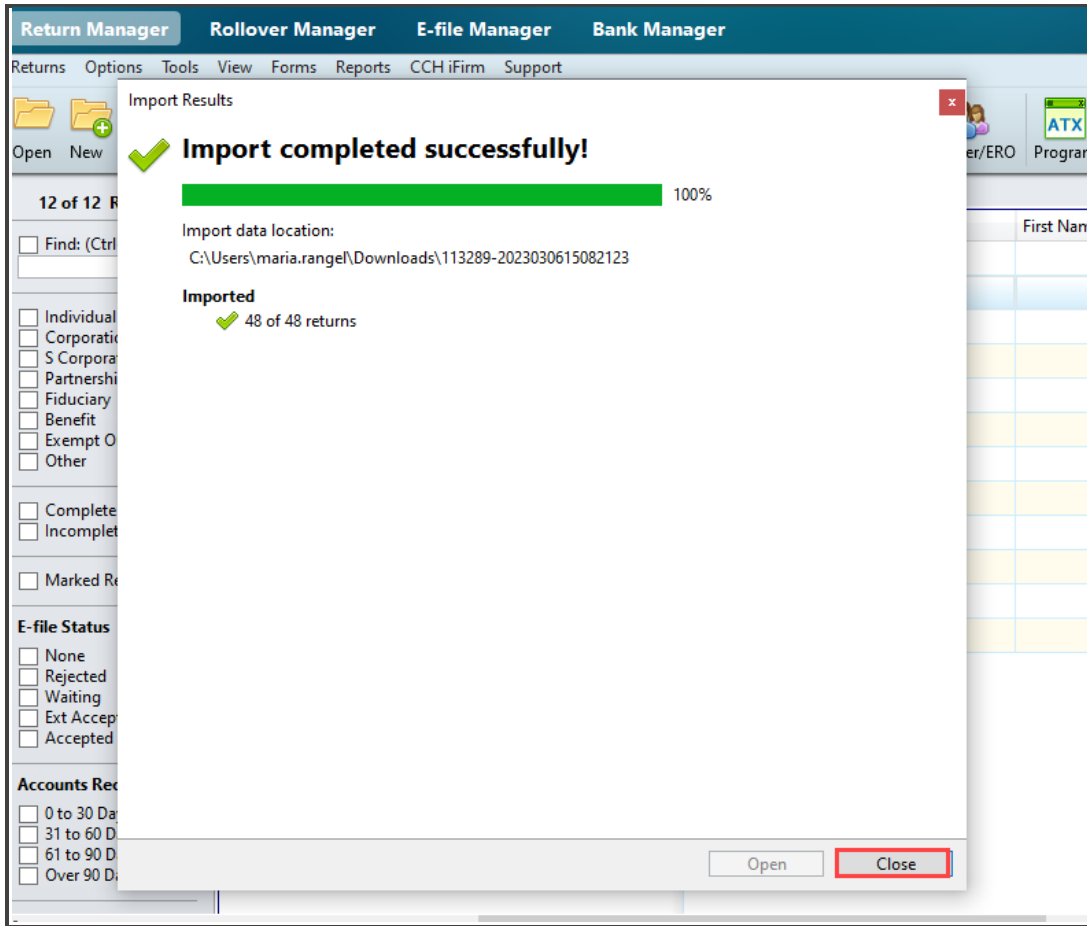
- Log in to your tax program.
- From the Return Manager, click the **Returns** menu. Hover over the **Import** menu and select **Returns**.



3. Navigate to the location of the file that was downloaded from Return Retrieval. Remember that by default, this is the Downloads folders. Select the returns to be imported and click **Open**.



4. ATX displays the Importing progress dialog box. Once all the returns have been imported, you will see a confirmation message. Click **Close**.



5. ATX displays the imported returns on the Return Manager.

E-file	Return Name	Client #	Type	Complete	Job Status	First Name	Last Name	Filer DOB	Spouse First Name	Spouse Last Name	Spouse DOB
<input type="checkbox"/>	Unborn Child, Mother		1040	<input type="checkbox"/>		Mother	Unborn Child	3/26/1975			
<input type="checkbox"/>	Unnamed Return			<input type="checkbox"/>							
<input type="checkbox"/>	Moomaw, Jessica		1040	<input type="checkbox"/>		Jessica	Moomaw				
<input type="checkbox"/>	Smith, Peggy Smith		1040	<input type="checkbox"/>		Peggy Smith	Smith				
<input type="checkbox"/>	Copy (1) of Unnamed Retur			<input type="checkbox"/>							
<input type="checkbox"/>	Sale of Primary Residence, *		1040	<input type="checkbox"/>		Taxpayer	Sale of Primary Res	3/26/1975	Spouse	Sale of Primary Res	5/21/1971
<input type="checkbox"/>	Copy (1) of Mar Financial S		1065	<input type="checkbox"/>							
<input type="checkbox"/>	Mar Financial Services		1065	<input type="checkbox"/>							
<input type="checkbox"/>	Hammonds, John	101-2022	1040	<input type="checkbox"/>		John	Hammonds	9/25/1978			
<input type="checkbox"/>	Gant, James	102-2022	1040	<input type="checkbox"/>		James	Gant	1/11/1990			
<input type="checkbox"/>	Johnson, Richard and Karer	103-2022	1040	<input type="checkbox"/>		Richard	JOHNSON	4/13/1987	Karen	JOHNSON	6/6/1988
<input type="checkbox"/>	Taxpayer, Christopher J and	1040 MAR	1040	<input type="checkbox"/>		Christopher	Taxpayer	3/26/1975	Jessica	Taxpayer	2/12/1976
<input type="checkbox"/>	Stevens, Robert	104-2022	1040	<input type="checkbox"/>		Robert	Stevens	6/16/1976			
<input type="checkbox"/>	Langston, George and Sand	105-2022	1040	<input type="checkbox"/>		George	Langston	3/12/1975	Sandra	Langston	9/27/1980
<input type="checkbox"/>	Williams, Jane	106-2022	1040	<input type="checkbox"/>		Jane	Williams	7/19/1981			
<input type="checkbox"/>	McDaniel, Jessica	107-2022	1040	<input type="checkbox"/>		Jessica	McDaniel	3/12/1995			
<input type="checkbox"/>	Holmes, Julia	108-2022	1040	<input type="checkbox"/>		Julia	Holmes	9/28/1984			
<input type="checkbox"/>	Stark, Jeff and Jill	109-2022	1040	<input type="checkbox"/>		Jeff	Stark	2/28/1982	Jill	Stark	8/2/1983
<input type="checkbox"/>	Barnes, Karen	110-2020	1040	<input type="checkbox"/>		Karen	Barnes	1/20/1987			
<input type="checkbox"/>	Mitchell, Maria	201-2022	1040	<input type="checkbox"/>		Maria	Mitchell	3/26/1992			