Tax & Accounting

Professional and
Client Services

CCH Axcess™ Tax

Training & Consulting Courses

Wolters Kluwer

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Timeline

Our Professional and Client Services department will be ready to get you up and running with our solutions. You can expect the following:

- You will be assigned a team of professionals that will work with you throughout the process to meet all implementation objectives
- A full implementation plan will be developed with milestones and tracking

CCH Axcess™ Tax Implementation Timeline

Illustration is intended to provide general guidance; actual implementation time is dependent on many factors, primarily staff availability and the number, size, and complexity of the firm's tax returns. Timing of the Tax Conversion is variable and depends on the timeframe of the CCH Axcess Tax implementation.

It is recommended you work with your Solutions Consultant to determine the optimal plan for your office.

Role-Based Training

Most of our training is role based; this means that training is provided in the context of a specific role, including what it takes to perform that role. For example, administrators will need to learn how to perform different functions in the solution than end users. So, consider which staff members need to learn how to perform that role in the solution when looking at a course.

We've divided the training and consulting courses into these roles:

- Champions Team
- End User
- Administrator

Course Delivery Methods

The Delivery Method is the way course content is conveyed from software consultant to students.

One-on-One Onsite

Our One-on-One Onsite sessions provide an opportunity for a software consultant to come to your office and work in-person with your staff. There is something valuable in having a consultant come to your office. Onsite training requires two consecutive days minimum per product. We will bill you for the consultant's travel costs.

One-on-One Web

With One-on-One Web, your staff interacts with a software consultant online, covering course material and following along as the consultant shares their screen. This is a best value if you need four or more staff trained on a course.

Webinar

In a webinar, you and staff from other offices are together in a live Consultant-led course held in a web meeting room. Webinars are scheduled on a pre-set day and time. These are also known as MTS sessions.

Self-Study (eLearning)

Self-Study is self-paced, online training that uses electronic media such as audio and video to connect your staff to course content on the internet. Staff have access to the Self-Study course for one year and can review the material repeatedly.

Best Practice Consulting

Designed to help you define the most effective way to use CCH Axcess™ Tax in your office, our knowledgeable consultants work closely with you to understand your current workflow and then help you make the right decisions necessary to achieve maximum productivity in performing administrative tasks and preparing and reviewing tax returns. The resulting redesigned workflow will lead you to increased efficiencies during tax season and all year long. This course will benefit new and existing customers alike.

Course Objectives

- Understand office environment, including departmental relationships
- Improve office tax return preparation processes
- Optimize firm settings and configurations
- Understand and begin completion of the best practices documents

Delivery Methods and CPE

- One-on-One Onsite: Taxes – 8 credit hours
- One-on-One Web: Taxes – 2 credit hours (For new customers, we recommend adding the 'Best Practices - Additional 2 Hours' session to this session.)

Who Should Attend?

- Best Practices Consulting is recommended for new users to CCH Axcess™ Tax
- Role: Champions Team

Program Information

- Program Level: Basic
- Prerequisites: None
- Advanced Preparation: None

System Administrator

Designed to help you configure CCH Axcess™ Tax in your office; our consultants work closely with you to understand the configuration process. They help you make the right decisions necessary to achieve standardization and maximum productivity when preparing and reviewing tax returns. This course is designed for firms migrating to CCH Axcess™ Tax.

Course Objectives

- Setup Tax options and return defaults
- Setup return print sets
- Setup return configuration sets
- Use Correspondence Manager

Delivery Methods and CPE

- Webinar: Taxes – 2 credit hours
- Self-Study: Taxes – 3 credit hours

Who Should Attend?

- Role: Champions Team

Program Information

- Program Level: Basic
- Prerequisites: None
- Advanced Preparation: None

NOTE: If your office decides to purchase Best Practices Consulting (Web or Onsite), you do not also need a System Administrator training. This content is covered during Best Practices Consulting.

Tax Preparer (Migrating)

Discover the distinguishing features and functions of CCH Axcess™ Tax. See how the new technology features will provide your office improved ease-of-use in the tax preparation process. New terminology associated with similar CCH® ProSystem *fx*® Tax functions will also be discussed.

Course Objectives

- Utilize new features and functions
- Understand the Dashboard and Return Manager
- Create and customize views in Return Manager
- Navigate the screen layout of CCH Axcess™ Tax Worksheet View
- Use Correspondence Manager to edit letters in a return

Delivery Methods and CPE

- One-on-One Onsite: Taxes – 2 credit hours
- One-on-One Web: Taxes – 2 credit hours
- Self-Study: Taxes – 4 credit hours

Who Should Attend?

- All experienced CCH® ProSystem fx® Tax users transitioning to CCH Axcess™ Tax.
- Roles: End User, Administrator

Program Information

- Program Level: Basic
- Prerequisites: Prior experience using CCH® ProSystem *fx*® Tax
- Advanced Preparation: None

Tax Preparer (New)

Using the intuitive and easy-to-use Worksheet View interface, this course addresses system navigation, tools and return template types.

Course Objectives

- Understand the Dashboard and Return Manager
- Import and export from/to Microsoft® Excel®
- Utilize the program Help features
- Review returns efficiently on screen
- View and edit letters using Correspondence Manager
- Use the Print and Print Preview options

Delivery Methods and CPE

- One-on-One Onsite: Taxes – 2 credit hours
- One-on-One Web: Taxes – 2 credit hours
- Self-Study: Taxes – 4 credit hours

Who Should Attend?

- New users to CCH Axcess™ Tax
- Role: End User

Program Information

- Program Level: Basic
- Prerequisites: None
- Advanced Preparation: None

Introduction to Individual Returns

Learn how to prepare Individual tax returns using CCH Axcess™ Tax. This session is conducted using the intuitive and easy-to-learn Worksheet View interface.

Course Objectives

- Understand income and deduction data entry
- Enter asset data for depreciation calculations
- Import K-1 data from passthrough returns
- Process multi-state, kiddie tax and amended returns

Delivery Methods and CPE

- One-on-One Onsite: Taxes – 2 credit hours
- One-on-One Web: Taxes – 2 credit hours
- Self-Study: Taxes – 2 credit hours

Who Should Attend?

- Any staff preparing/reviewing Individual tax returns.
- Role: End User

Program Information

- Program Level: Basic
- Prerequisites: CCH Axcess™ Tax – Tax Preparer (New) course or equivalent experience
- Advanced Preparation: None

Introduction to Partnership Returns

Learn how to easily prepare Partnership tax returns in CCH Axcess™ Tax, utilizing the intuitive and easy-to-use Worksheet View interface.

Course Objectives

- Identify the appropriate worksheets for efficient return preparation
- Complete Schedules L, M-1, M-2, and M-3
- Understand and import multi-state allocation and apportionment data
- Import partner data and export K-1 data to other returns
- Allocate Income and Deduction items using Special Allocations or Ratios

Delivery Methods and CPE

- One-on-One Onsite: Taxes – 2 credit hours
- One-on-One Web: Taxes – 2 credit hours
- Webinar: Taxes – 2 credit hours

Who Should Attend?

- Any staff preparing/reviewing Partnership tax returns.
- Role: End User

Program Information

- Program Level: Basic
- Prerequisites: CCH Axcess™ Tax – Tax Preparer (New) course or equivalent experience
- Advanced Preparation: None

Introduction to Corporation Returns

Learn how to prepare Corporation and S Corporation tax returns in CCH Axcess™ Tax, utilizing the intuitive and easy-to-use Worksheet View interface.

Course Objectives

- Identify the appropriate worksheets for efficient return preparation
- Generate C or S Corporation returns
- Complete Schedules L, M-1, M-2, and M-3
- Understand and import multi-state allocation and apportionment data

Delivery Methods and CPE

- One-on-One Onsite: Taxes – 2 credit hours
- One-on-One Web: Taxes – 2 credit hours
- Webinar: Taxes – 2 credit hours

Who Should Attend?

- Any staff preparing/reviewing Corporation tax returns
- Role: End User

Program Information:

- Program Level: Basic
- Prerequisites: CCH Axcess™ Tax – Tax Preparer (New) or equivalent experience
- Advanced Preparation: None

Process Administrator

An introduction to the day-to-day processing of tax returns using the CCH Axcess™ Tax program; including Batch Manager, Return Manager and Electronic Filing.

Course Objectives

- Use Return Manager to sort and open returns
- Print Returns
- Use Batch Manager to process organizers and roll forward returns
- Upload returns for e-filing
- Track electronically filed returns

Delivery Methods and CPE

- One-on-One Onsite: Taxes – 2 credit hours
- One-on-One Web: Taxes – 2 credit hours
- Webinar: Taxes – 2 credit hours
- Self-Study: Taxes – 3 credit hours

Who Should Attend?

- Administrative staff and IT personnel
- Role: Administrator

Program Information

- Program Level: Basic
- Prerequisites: None
- Advanced Preparation: None

Introduction to Correspondence Manager

This course is designed for office staff members who want to learn how to navigate and utilize the functions of the Correspondence Manager module within CCH Axcess™ Tax. Upon completion of this course, you can setup and make changes to the correspondence for tax returns your office prepares.

Course Objectives

- Understand the functional rights for Correspondence Manager
- Access and navigate Correspondence Manager
- Understand Correspondence Manager options
- Understand Conditions, Expressions and Grammar Variables

Delivery Methods and CPE

- One-on-One Onsite: Taxes – 2 credit hours
- One-on-One Web: Taxes – 2 credit hours
- Webinar: Taxes – 2 credit hours

Who Should Attend?

- Staff members who are responsible for editing the firm's tax return correspondence, such as, transmittal letters, cover letters and filing Instructions templates
- Role: Administrator

Program Information

- Program Level: Basic
- Prerequisites: None
- Advanced Preparation: None

Correspondence Manager Workshop

This workshop is designed for offices that want specialized assistance using the Correspondence Manager module within CCH Axcess™ Tax. During the workshop, with guidance of a Tax Software Consultant, you will make edits to your office tax return correspondence.

Workshop Objectives

- Use Correspondence Manager to modify your office tax return correspondence

Delivery Methods and CPE

- One-on-One Onsite: Taxes – 2 credit hours
- One-on-One Web: Taxes – 2 credit hours

Who Should Attend?

- Firm members who are responsible for editing the office's tax return correspondence, such as, transmittal letters, cover letters and filing instructions
- Role: Administrator

Program Information:

- Program Level: Advanced
- Prerequisites: Introduction to Correspondence Manager course
- Advanced Preparation: None

Introduction to CCH® My1040Data

This course introduces you to creating My1040Data organizers in CCH Axcess™ Tax.

Course Objectives

- Configure your firm's CCH® My1040Data
- Process organizers for new and existing Clients
- Check the status of an organizer
- View attachments
- Download your client's completed organizers
- Print attachments and route them to CCH® ProSystem *fx*® Scan

Delivery Methods and CPE

- One-on-One Onsite: Computer Software & Applications – 1 credit hour
- One-on-One Web: Computer Software & Applications – 1 credit hour

Who Should Attend?

- Administration staff and managers
- Role: Administrator

Program Information

- Program Level: Basic
- Prerequisites: None
- Advanced Preparation: None

Appendix: Course Tables of Contents

For more details on what topics are covered in each course the table of contents from the handout for each course is included in this appendix.

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