



Tax & Accounting

Professional and
Client Services

CCH® ProSystem fx® Scan
Training & Consulting Courses

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Timeline

NOTE: The courses listed are for both CCH® ProSystem fx® Scan and CCH® ProSystem fx® Scan (SaaS).

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® ProSystem fx® Scan Implementation Timeline



Illustration is intended to provide general guidance; actual implementation time is dependent on many factors.

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
- Scan Operator
- End User
- IT 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 ensure you have a smooth implementation with CCH® ProSystem fx® Scan, our knowledgeable consultants guide firm implementation leaders/champions through important considerations necessary to progress further into the paperless preparation arena. This session will provide the Champions Team with a thorough understanding of how the CCH® ProSystem fx® Scan application can best fit in your environment. We will look at your current workflow process and guide you in the implementation. Our consultants will use their experience to make recommendations for a more efficient process.

Course Objectives

- Understand the various components of your paperless preparation process.
- Understand the options for moving forward and the efficiencies that can be gained.
- Implement the PDFlyer tools and take control over the electronic workpapers.
- Optimize your firm's paperless 1040 workflow.

Delivery Methods and CPE

- One-on-One Onsite: Taxes – 3 credit hours
- One-on-One Web: Taxes – 3 credit hours

Who Should Attend?

- Scan Champions Team – This team is responsible for the implementation and/or ongoing management of CCH® ProSystem fx® Scan and should include representation from each department in the firm that engages in the process.
- Role: Champions Team

Program Information

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

Scan Operator

Learn the critical steps necessary for an efficient digital conversion process of 1040 source documents using CCH® ProSystem fx® Scan. End users will learn what the product is doing behind the scenes, from when a client's documents are put into the scanner through the automatic document conversion and the final product which is the bookmarked PDF.

Course Objectives

- Perform the digital conversion process including document preparation, scanning and quality control.
- Understand the components and workflow of CCH® ProSystem fx® Scan.
- Manage scanner settings.

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?

- All staff new to CCH® ProSystem fx® Scan who will be involved in the digital conversion portion of the CCH® ProSystem fx® Scan process.
- Role: Scan Operator

Program Information

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

PDFlyer

Understanding how to effectively navigate and mark up the bookmarked PDF produced by the CCH® ProSystem fx® Scan product is critical to the paperless 1040 process. End-users will learn how to maximize productivity by using the PDFlyer™ toolbars integrated into Adobe® Acrobat.

Course Objectives

- Understand how CCH® ProSystem fx® Scan will transform the individual tax process.
- Efficient use of the PDFlyer functions, for the preparer and the reviewer.
- Understand the process of adding additional electronic workpapers.

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?

- All staff new to CCH® ProSystem fx® Scan who will be involved in the preparation and review portion of the CCH® ProSystem fx® Scan process.
- Role: End User

Program Information

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

AutoFlow

CCH® ProSystem fx® Scan with AutoFlow technology can be a powerful tool since it will save the firm time and money. Learn the details of each AutoFlow step to streamline the import process and avoid the pitfalls that can waste time.

Course Objectives

- Import data from supported forms using AutoFlow.
- Identify 1040 clients that will be the best candidates for performing AutoFlow.
- Understand the complete AutoFlow process to perform the steps in an efficient manner.

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?

- Scan Champions Team and all staff new to CCH® ProSystem fx® Scan who will be involved in the preparation and review portion of the CCH® ProSystem fx® Scan with AutoFlow process.
- Role: Champions Team and End User

Program Information

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

Maximizing Efficiencies with CCH® ProSystem fx® Scan and AutoFlow

Maximizing Efficiencies with CCH® ProSystem fx® Scan with AutoFlow is a customized consulting session designed to assist users of CCH ProSystem fx Scan (with or without AutoFlow Technology) with improving their tax workflow processes using these tools. Our expert consultants will walk you through a workflow component checklist to uncover the high priority issues requiring consultation, and the entire paperless 1040 tax workflow will be analyzed in this custom consulting session.

Course Objectives

- Refine current workflow processes, as they relate to CCH® ProSystem fx® Scan and AutoFlow
- Learn key problem-solving tips for common workflow issues
- Understand how further standardization of processes can transform your paperless tax workflow

Delivery Methods and CPE

- One-on-One Onsite: Computer Software & Application – 2 credit hours
- One-on-One Web: Computer Software & Application – 2 credit hours

Who Should Attend?

- Champions Team Members from organizations currently using CCH® ProSystem fx® Scan
- Role: Champions Team

Program Information

- Program Level: Intermediate
- Prerequisites: Completed CCH® ProSystem fx® Scan/AutoFlow training
- Advanced Preparation: None

Taking Your Use of Adobe® Acrobat® to the Next Level

Adobe® Acrobat® is an essential tool for paperless office. In this hands-on workshop, learn intermediate techniques, tips, and tricks to enhance your paperless tax practice and simplify your day-to-day activities by using a combination of Adobe® Acrobat® DC tools and CCH ProSystem fx PDFlyer tools. Topics will include creating fillable PDF forms, combining different file types into a single PDF, and locking or securing workpapers to prevent changes.

Course Objectives

- Understand how to navigate within Adobe® Acrobat® DC
- Understand when to use PDFlyer tools versus Adobe® Acrobat® DC tools
- Attach files to a PDF file and combine different file types in a PDF
- Change the actions of a bookmark
- Lock or secure your PDF workpapers

Delivery Methods and CPE

- One-on-One Onsite: Computer Software & Application – 2 credit hours
- One-on-One Web: Computer Software & Application – 2 credit hours

Who Should Attend?

- All users who will manage and manipulate PDF files and workpapers
- Role: End Users

Program Information

- Program Level: Intermediate
- Prerequisites: Working knowledge of PDF files
- Advanced Preparation: None

IT Consulting

A well-informed IT department is essential for a successful implementation of CCH® ProSystem fx® Scan. Learn how to properly install, maintain, and support this product.

Course Objectives

- Understand installation procedures and issues.
- Review hardware and software requirements.
- Optimize scanner and application setting.
- Review the file storage, file sharing and security requirements (including the Citrix/Terminal Server).
- Test the application to ensure proper functionality in the installed environment.

Delivery Methods and CPE

- Web: No CPE certificates 2 hours

Who Should Attend?

- IT Personnel
- Role: IT administrator

Program Information

- Program Level: Basic
- Prerequisites: Network experience
- 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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