ATX[™] Learning Portal

Adding Forms

ATX allows you to add forms to an open return at any time.

To add forms to a return:

1. Click Add Forms.



- 2. In the Select Forms dialog box, type the form name in the Find box.
- 3. Select the form in the list and click **Open Forms**.



4. ATX adds the form to the return and lists the new form as a tab on the left.



Save Add Forms F	Restore Start Link	Interview	Here and the second sec	Check Return Prin	Page	CCH iFirm Clie	nt Portal E-f	ePayment	Calculator	Preparer/ERO	Tax Research Search	Online Practice Aids	15. s Form Release
1040	HI I Record	d: 1 🕨 🕨	Add New R	ecord Delete Record	I								
1040 EF Info Federal Client Letter	Click the Pre	evious a	nd Next a	rrows in the t	oolbar	to view a	single re	ecord. All	l records	s are displ	ayed on the [Detail sheet.	
Bank Account Comparison	QuickEntry	y - Select	Payer > >	>		~		dd to Pay	er Manaç	ger			
1099-DIV	Sele	ct Filer/S	pouse/Joir	nt	Cheo	ck if restric	ted stock	(Box 1a) r	eported a	is wages			
	PAYER'S nan	ne					1a Total	ordinary di	ividends				
							\$						
	PAYER'S TIN	í 👘					Adjus	tment to b	ox 1a	Code			
							\$				Divi		
							1b Quali	fied divide	nds			dends ar	a
							\$				Dis	tribution	S
	Street addres	s line 1					Adjus	tment to b	ox 1b	Code			
							\$						
	Street addres	s line 2					Extra	ordinary di	iv. incl. in	box 1b			
	Oit.			Otata	710	da	\$ 20 Tetel			41 m m			
	City			State	ZIP	coue	2a 10tai	capital gai	n aistribu	uons			
							Φ						

Adding State Forms

To add state forms:

- 1. In the Select Forms window, select the **State** checkbox.
- 2. To filter to a specific state, select the state from the drop-down list.

Select Forms for Auto-Save	ed Return				c	×
Forms View	orm Help Cancel					
39 of 5,228 Forms	Name	Description	Status	PDF	Approved	\sim
Find: (Ctrl+F)	GA 500	Individual Income Tax Return	Installed	View Instr	×	
	GA Sch 1 (500)	Schedule 1 - Adjustments to Income	Installed	View Instr	~	
	GA Sch 2, 2B (500)	Sch 2 - Tax Credits, Sch 2B - Refundable Credits	Installed	View Instr	~	
	GA Sch 3 (500)	Schedule 3 - Part - Year Nonresident	Installed	View Instr	~	
✓ Local GA ✓	GA 4562	Depreciation and Amortization	Installed	View Instr	×	
		terre internet internet internet		A		

3. Select the forms and click Open Forms.

Adding a Client Letter

To add a letter to an open return:

- **1.** On the **Forms** menu, click **Client Letter**.
- 2. In the Client Communication Manager dialog box, click Attach.



3. In the Attach to Return dialog box, select the check box for the letter you want to add and click Attach.

Attach to	o Return		8
1	Select the document(s) to attach to the return:		
		Details	
	▲ Letters		*
	Client Letters		=
	Federal Client Letter		
	Federal Estimate Letter		
	Federal Privacy Notice		
	Federal Cover Sheet		
	Federal Est Voucher		*
		Attach Cancel	

4. Close **Client Communication Manager** to view the letter in the return. ATX completes the variable fields with the information from the return.

1040	Preview Letter O Letter Options Edit Formatting
1040 EF Info	
W-2	
Bank Account	August 27, 2020
Comparison	
1099-DIV	James Example
	KENNESAW, GA 30144
	Dear James, Example
	You will receive a federal refund check in the amount of \$475 in the mail
	You can check the status of your federal tax refund by using "Where's My Refund?", an interactive tool available on www.IRS.gov.or.by.using the "IRS2Co" smatthbore application. You can also call the IRS
	TeleTax System at (800) 829-4477 or the IRS Refund Hotline at (800) 829-1954. When using any of these
	options, you will need the following information:
	The first social security number shown on the federal return
	Your filing status (Single)
	The exact amount of the refund shown on your federal return (\$4/5)
	Enclosed please find two copies of your 2019 federal income tax return. I have prepared your return based
	on the information you provided. File one copy with the Internal Revenue Service and retain the second
	copy for your records. mease review, sign, and date your ming copy before maining.

For more information on editing client letters, please review the *Managing Client Letters* lesson in the Admin Roles and Functions module.

Adding a Billing Invoice

If you use the ATX billing invoice, you can add a client's invoice directly to the return.

To add an invoice:

- **1.** On the **Forms** menu, click **Billing Invoice**.
- 2. ATX displays the billing invoice in the return.

1040 Sch A Sch EIC 1040 EF Info 8867	Print this worksheet The total amount charged for tax preparation fees depends on the billing methods you have selected. Search 'Billing Rates' in Program Help for instructions on changing the basic fees charged for specific forms or schedules.
Bank Account	Billing Options
W-2	Last year's Total Bill:
Federal Client Letter	Preparer Information
Billing	X Print on Invoice
	Name CCH SFS
	Address 225 Chastain Meadows Ct
	City Kennesaw State GA Zip 30144
	Foreign Country
	Telephone Number

3. You can choose one or more methods for billing, choose to combine all charges into one line item, or create a detailed billing statement.

To select a billing method:

1. Select the check box(es) for the billing methods you want to use.

Ch	Check the box(es) for the appropriate billing method(s):				
-		Description		Amount	
	Flat fee billing	Tax return preparation fee			
	Hourly rate billing	Hourly billing fee		0.00	
	By Form/Schedule	Total Charges for Forms and Schedules		0.00	
	By Worksheet	Total Charges for Worksheets and Statements		0.00	
	Combine all charges above	Tax return preparation fee	Total:	0.00	

- 2. ATX calculates the bill amount based on rates you set in Billing Manager.
- **3.** Select any display options you want to apply.

Invoice and Forms Statement Options	
Display list of forms, schedules, and worksheets on:	
Invoice	
Forms Statement	
Note: More than 20 items will cause ALL items to appear on 'Forms Statement'.	
The text "See Forms Statement" will appear at the bottom of the 'Invoice' (unless suppressed, be	low)
Include invoice number on 'Invoice'	
X Include tax year on 'Invoice' 2017	
X Display additional text inputs beneath total on 'Invoice'	
Display Total on 'Forms Statement'	
Suppress "See Forms Statement" text on 'Invoice' if forms/schedules display on 'Forms Statement'	
	Amount
Enter retainer amount or prepayment (this will be displayed on 'Invoice')	
Form Display Options	
Display charge amount for forms, schedules, and worksheets	
Display forms, schedules, and worksheets with no charge	

- 4. Select any additional charges to add for this return.
- **5.** Type any discounts and adjustments not offered in the other options using the **Miscellaneous Options** section.

Miscellaneous Options	B 111		
Other Adjustments	Description		Amount
Discount	Discount		0.00%
Additional Discounts	Additional Discounts		0.00
Other Information			
Other Information			
Other Information		- 1	
Other Information		- 1	
Sales Tay Rate	Salac Tay	- 1	6.00%
		_	0.0070

If you choose **Hourly rate billing**, you must enter the total time spent on the return using the **Hourly Billing Rates** worksheet tab to calculate the total amount due.

	Hourly Billing Rates Prepared for: Total:	James and Jane 1	Faxpayer	
	Description	Rate	Hours	Charge
Rate 1	Bob	99.00		0.00
Rate 2	Jane	75.00		0.00
Rate 3	Joe	25.00		0.00
Rate 4	John	100.00		0.00
Rate 5	Julian	400.00		0.00
Rate 6	Kathy	125.00		0.00
Rate 7	Mary	60.00		0.00
Rate 8	Megan	75.00		0.00
Rate 9	Sally	50.00		0.00
Rate 10	Tony	100.00		0.00

For more information on setting up billing rates by hour or by form, please review the lesson on *Billing Manager* in the Admin Roles and Functions module.

Discarding Forms

If you need to remove forms from a return, right-click on the form and choose to discard either one or multiple forms.

1040	Form 1040 Con
1040 EF Info	
Bank Account	1040 Bags
Comparison	1040, Fage
W-2 3	Rename Form
	Duplicate Form
	Add All Client Letters
	Discard Form
	Discard Multiple Forms