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**Tax & Accounting**

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**Professional and  
Client Services**

**CCH Axcess™ Tax  
Preparer**



## Introduction

This guide introduces you to the fundamental navigation of CCH Access Tax that assists you in effectively learning and using the program.

We will emphasize the key areas of navigation and how that can help you prepare and review returns using CCH Access Tax. In addition, we will introduce you to a wide variety of techniques for getting help with questions, including help screens, cross-references and more.

## Continuing Professional Education

This course qualifies for *two hours of Taxes CPE credit*.

Visit [EngageTax.WoltersKluwer.com/training/feedback](https://EngageTax.WoltersKluwer.com/training/feedback) to request CPE and provide an evaluation of this course.







Session code: \_\_\_\_\_ Account number: \_\_\_\_\_

**\*\*CPE Qualification may vary by state\*\***

## Objectives

Upon completion of this course, you should be able to:

- Use Return Manager to quickly access existing tax returns or create a new return
- Use the ribbon for program navigation and customize the quick access toolbar
- Set user options
- Navigate and enter data in Worksheet View
- Import and export data to and from the Worksheet summary grids using a spreadsheet
- Utilize the various on-screen review techniques
- Identify and utilize the extensive online help tools

Icon Legend	
	Keys Quick reference to the key aspects of a function
	Tip Best practice tips and shortcuts
	Notes Informational notes about functions
	Write Steps or information to write down
	Caution Important warnings about a function
	Movie Video clips with additional training tips

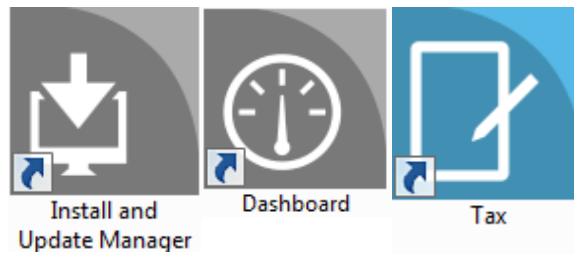
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## Getting Started in CCH Access Tax

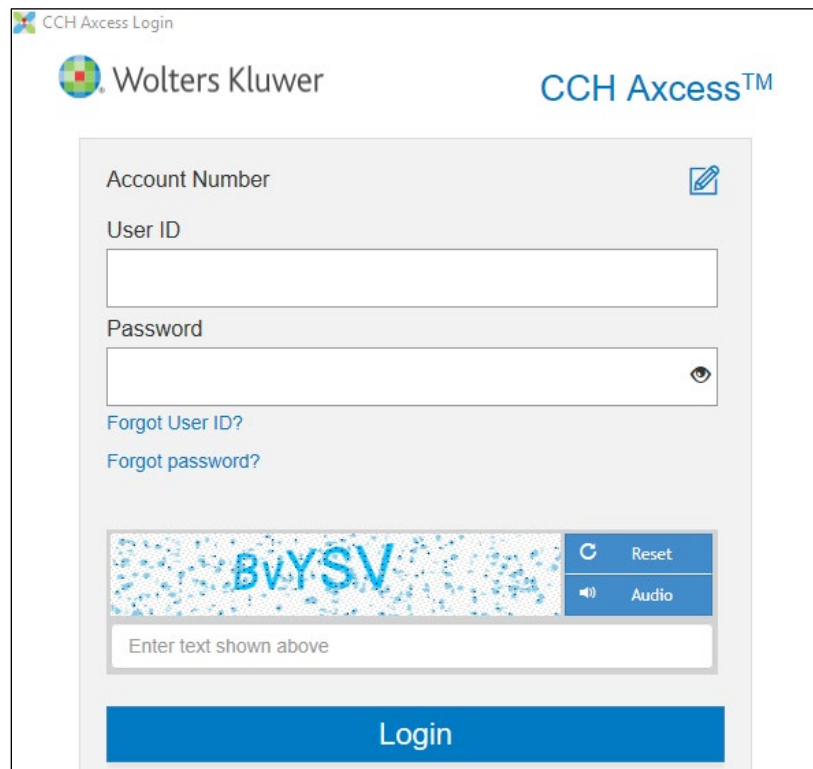
This section covers the general navigation features and the user options available to create and process tax returns of all types. CCH Access Tax allows you to process federal and state tax returns for Individual, Partnership, Corporation, S-Corporation, Fiduciary, Exempt Organization, Employee Benefit Plans, and Estate and Gift Tax returns. Refer to the Individual, Partnership, and Corporation training guides for detailed return-type information.

In the CCH Access Suite, you can open or create returns using the Dashboard or CCH Access Tax icon from the desktop folder. Use the Install and Update Manager to check for program updates or to schedule the updates to install automatically.



## Login and Password

Each staff member logs in with a unique User ID and password that the administrative staff configures. The administrator also assigns a variety of functional rights to each staff member.

The screenshot shows the 'CCH Access Login' window. At the top left is the Wolters Kluwer logo, and at the top right is the 'CCH Access™' logo. The main form area contains the following elements: an 'Account Number' field with a blue edit icon to its right; a 'User ID' field with a white text input box; a 'Password' field with a white text input box and a blue eye icon to its right; two blue links: 'Forgot User ID?' and 'Forgot password?'; a security verification section with a blue background and white dots containing the text 'BvYSV', a 'Reset' button with a circular arrow icon, an 'Audio' button with a speaker icon, and a white text input box with the placeholder 'Enter text shown above'; and a large blue 'Login' button at the bottom.

## User Options

Tax **User Options** are accessible from the Dashboard or the Application button in Return Manager. User Options enable features in CCH Access Tax and set defaults for other Tax functions. You can also change your password and security questions and answers here.

User Options - Tax - Miscellaneous

Apps and Websites

▾ Tax

    Miscellaneous

    Return Manager

    Notes

    Batch Manager

    Print Options

    ▸ Interface Options

▸ Practice

Change Login Profile

Document

Plug-ins

▸ Interface Options

▸ Dashboard

▸ Common

**Miscellaneous options**

Enable AutoText descriptions

Enable AutoComplete when entering AutoText descriptions

Create K-1 export files each time return is calculated

Display *calc complete* confirmation message after each calculation

Display calculated data and data from other sources in blue

Show the Forms List to display worksheets when opening returns

Show Return Dashboard when opening returns

**Application menu options**

Number of recently accessed returns to display:

20

**Electronic filing upload notification**

Select the preferred method for receiving desktop notifications:

Every time a return is uploaded

Only when an exception has occurred

None

OK Cancel



For a complete overview of your User Options click [Setting Your Tax User Options](#)

## Return Manager

Return Manager is a powerful tool that lets you manage your returns with ease. You can open Return Manager from the Application Links page of the Dashboard. You can also go straight to Return Manager by Clicking the Tax icon in the CCH Access folder.

TAX YEAR	RETURN ID	NAME	FEDERAL E-FIL...	DESCRIPTION	RETURN CONFIGURATI...	RETURN STATUS
2023	2023I:UPDATE_1040	UPDATE, JOHN		Tax Update	BP 23	
2023	2023P:1065UPDATE	TAX UPDATE PARTN		Add info here	BP 23	
2023	2023I:Allen:V2	Allen, Joan H		Planning Return	BP 23	
2023	2023I:TaxIntro:V1	Smith, John			BP 23	
2023	2023I:Allen:V1	Allen, Joan H			BP 23	
2022	2022I:WYelton:V1	Yelton, Andrew W		Final	BP 23	
2022	2022P:1065-CO:V2	Acme Anvil Partne		Intro to Partnership	Default	
2022	2022I:TaxIntro:V2	Fellows, John	EXPORTED	Training Return	BP 23	Delivered
2022	2022I:1040-TR:V1	Smith, John		Intro to Individual	Default	
2022	2022I:EUO-TR:V1	Smith, John		Planning Return	Default	

Return Manager tools include:

- Open tax returns for multiple years
- Create tax returns and templates
- Roll Forward returns
- Set to Prohibit Changes
- Data grid customization
- Quick look at Federal, State and City e-file status
- Set user options using the Application Button

## Create and Open Tax Returns and Tax Return Templates

Create or open tax returns and templates using the File menu in Return Manager.

### Creating New Returns

Provided you have the functional rights, you can create new clients when adding new returns. When adding returns for an existing client, the list of available clients is defined by your rights to access specific clients. You also have the option of entering a password to secure returns.

The availability of return types depends on the client type established in the client profile and the return types licensed by your firm.



[Click Here for Adding and Securing Tax Returns](#)

## Creating New Return Templates

Tax templates allow you to set a master return for a tax year and return type. A tax template contains recurring information that you would like applied to new and rolled forward returns. You can create multiple tax templates for a return type and tax year, and they can be rolled forward each year.

 [Click here for more information on Tax Templates](#)

## Opening Tax Returns and Tax Return Templates

Open an existing return or template by double-clicking the return in the Return List grid; or by highlighting the return and selecting Open on the Toolbar.


The Return list grid is populated by returns defined by the Return Manager returns list option you set in User Options or returns defined by searches you perform.

Three methods are available for searching for returns:

- Client ID or Name
- Quick Search
- Search by View

## Client Search

From the Toolbar, enter a Client ID or a client name in the search field and click the magnifying glass to perform a multi-year search of your firm's database of tax returns. The results of the search are displayed in the Return List grid.

 Click the filter icon available in the column header to filter the results. The filter you select remains in place until you change it.

## Quick Search

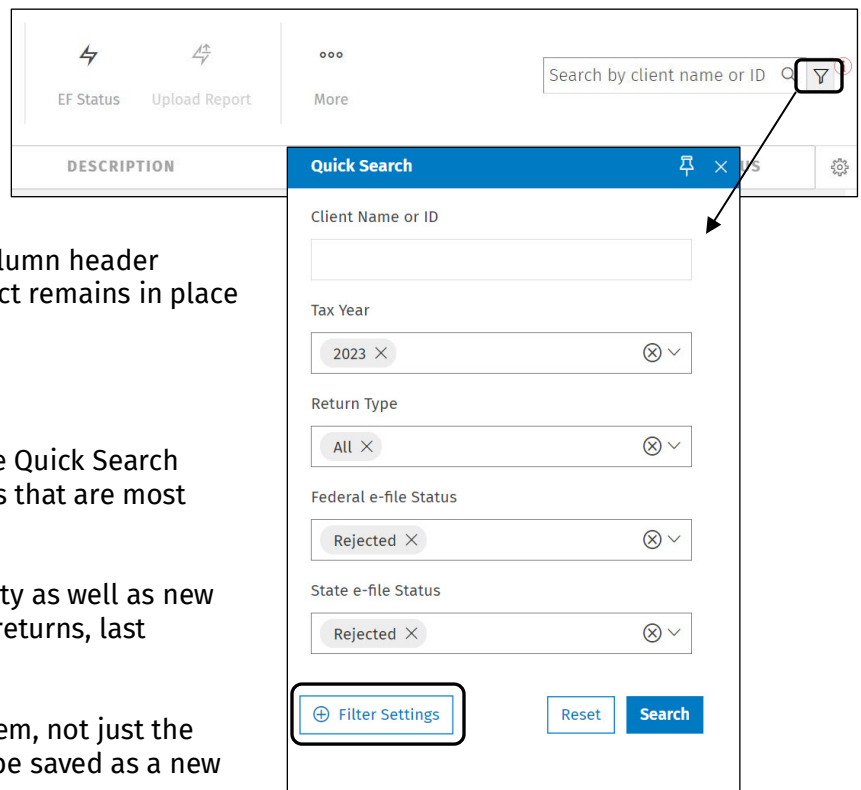
To further refine your search results, open the Quick Search pane. From here, you can customize the filters that are most relevant to you.

The Quick Search panel offers greater flexibility as well as new options for filtering such as filters for in-use returns, last modified date, spouse name and more.

Quick Search criteria searches the entire system, not just the current grid page contents. Results can then be saved as a new view.

You can customize the filters that display on the Quick Search panel by adding or removing both default and optional filters. Client ID/Name is the only filter that cannot be removed. Your selected filters are saved for future searches.

 [Click for more information on Default and Optional Filters](#)



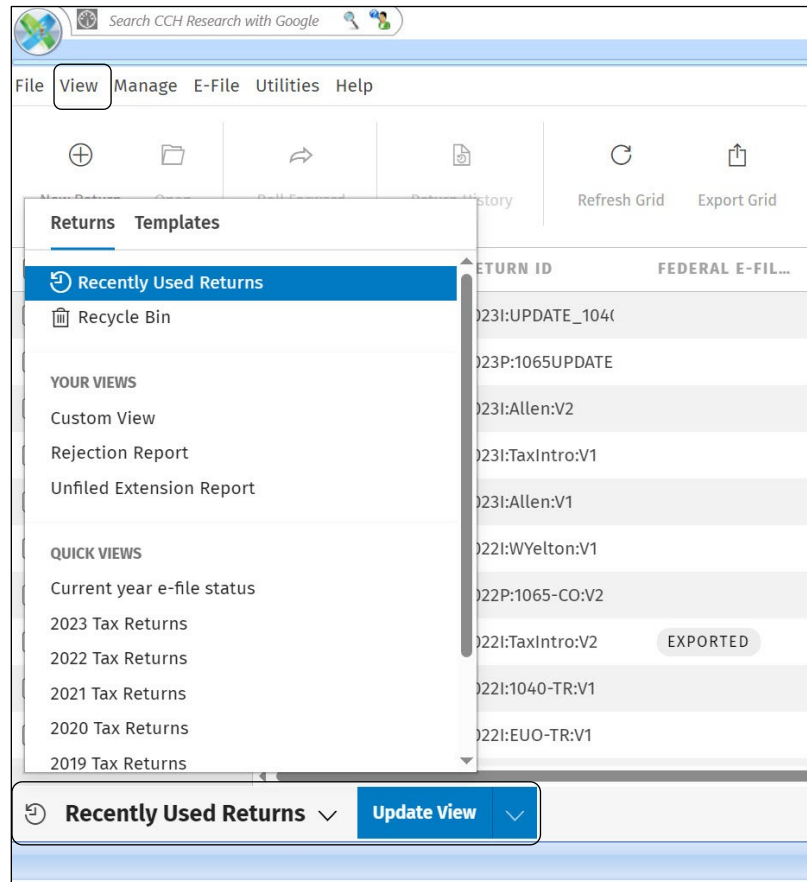
## Using Views in Return Manager

Views define the filters, columns, and sorting information to determine the records and associated data shown in the Returns grid. The default view is Recently Used Returns, for new users this will not show any returns until the returns have been opened.

Return Manager includes the following system-defined views:

- Recently Used Returns
- Recycle Bin

You can access pre-defined and custom views for both returns and templates from the Views drop-down or by selecting **View > Change Current View** from the drop-down menu at the top of the Return Manager window. Switch between Returns and Templates views via the tabs in the views drop-down.



[Click for more information on creating Custom Views](#)



[Setting Your Return Manager User Options \(cchaccess.com\)](#)

## Working with the Return Manager Grid

The grid lists returns, or tax return templates and displays all existing items for the selected view, client Search results, or Quick Search results. When the number of records exceeds a single page, you can move between pages of records using controls located below the grid. The number of records that are displayed in the Most Recently Used View is configurable using your User Options located at Application Button > User Options > Return Manager.

### Customizing Columns

You can customize your columns and their sequence by using the **Edit Columns** option. To save your changes to your current view, click on Update View. The program default displays the most recently used returns and templates, but you can change the default to display the last view used using your User Options.

You can also refine your search results by selecting the filter icon next to any column heading.



Click any of the column headings to sort the grid by that item. The arrow in the column header indicates whether the sorting is in ascending or descending order.

### Client Details

For 1040 returns created for tax years 2021 and later, you can quickly view client contact information by clicking on the information icon next to the taxpayer's name. This option will not be available on password-protected returns.

## Updating Return Information from the Return Manager Grid

From the Return Manager grid, users with functional rights may change the Return Configuration Set (RCS), Return Signer, and Return Description. You cannot change returns that are in use.

RETURN CONFIGURATI...	DESCRIPTION	RETURN STATUS	SIGNER
Default	Amended Return		

To update the RCS or the return's Signer, click the down arrow in the applicable column. You can enter a value or select from the available list options. For returns that are locked by Prohibit Changes, you can only change the Return Configuration Set.

To add or change a return description, double-click in the Description column. Once you have completed your desired text, press enter. This description will also be visible throughout various Batch Manager functions.

## Exporting Grid Data

You can export Grids to XLS or XLSX file types, by selecting Export Grid from the Toolbar.

## Return Manager Utilities

Maintenance and Workstream features are located on the Return Manager Utilities tab.

### Recover

You can recover previous copies of tax returns. The system automatically saves up to four copies of a return: the current copy, two previous copies, and the first saved copy. Use the Recover feature when a return cannot open because of an error or corruption, or because you would like a previous copy.



[Steps to Recover Tax Return Copies](#)

### Back-Up and Restore

In Return Manager, you can back up tax returns to a specified location. If you choose to back up returns to a location that already contains a backup file, the Backup utility appends the data into one file. After backup, you can delete returns. You can also recall a tax return from the backup file using the Restore utility.



[Steps to Back up and Restore Returns](#)

### Print Blank Organizers

Return Manager offers the ability to print blank Organizer forms for new clients with no pre-existing Tax data.



[Steps to Print Blank Organizer Forms](#)

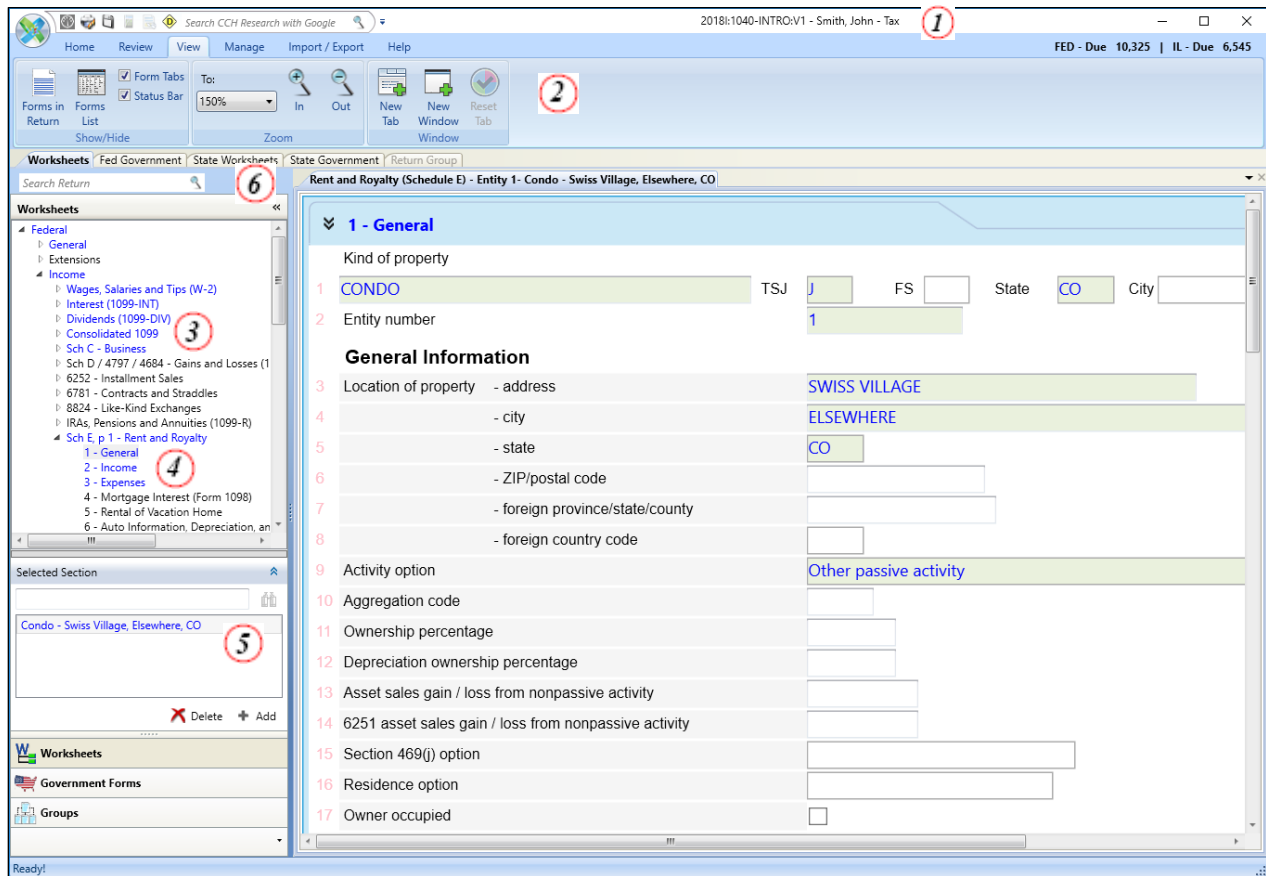
Utilities	Help
<b>MAINTENANCE</b>	
Recover	
Backup	
Restore	
Rebuild	
Send Password	
Send to Support	
Scan Returns	
Transfer to Axxess	
Transfer to ProSystem fx	
<b>TAX DATA</b>	
Import	
Export	
<b>WORKSTREAM</b>	
Route Sheet	
Update Status	
Link to Project	
<b>PRINT</b>	
Print Blank Organizer Forms	

## Working Inside Tax Returns

### Saving Tax Returns

To retain return data, you must select **Save** on the Application menu, click **Save** on the Quick Access toolbar, or select Save upon exit. Autosave does not replace the system save function. Like in any other true Windows application, the system saves a “recovery file” every two minutes. Autosave is automatically on.

### Screen Layout



1. Title Bar
2. The Ribbon
3. Worksheets
4. Worksheet Sections
5. Entities
6. Navigation Pane

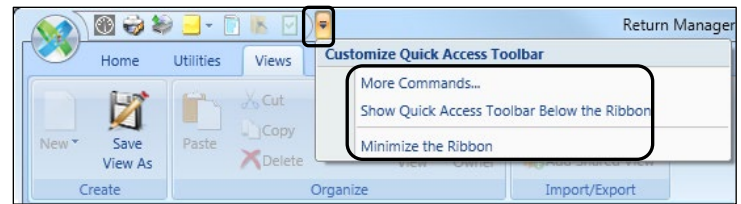
The intuitive layout in the Navigation Pane is divided into four areas:

- Tax Authorities
- Categories
- Worksheets
- Sections

Each level links more specifically to the level above it. Data is always entered at the Section level.

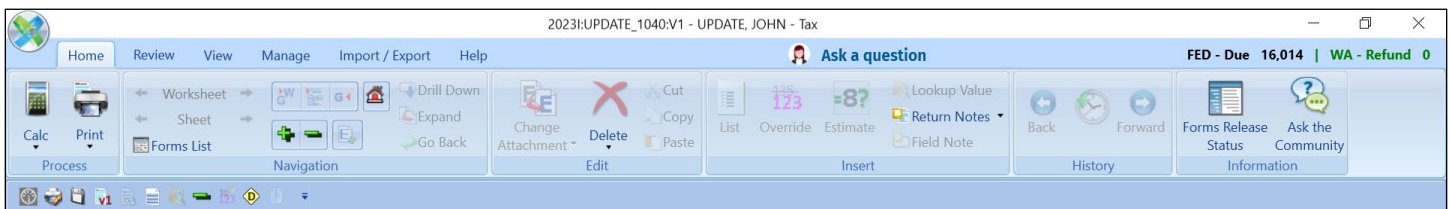
## Quick Access Toolbar

The Quick Access Toolbar displays above the Ribbon. To move this below the Ribbon, use the customize button to the right of the Toolbar. Right-clicking commands on the ribbon allows them to be added or removed from the toolbar.



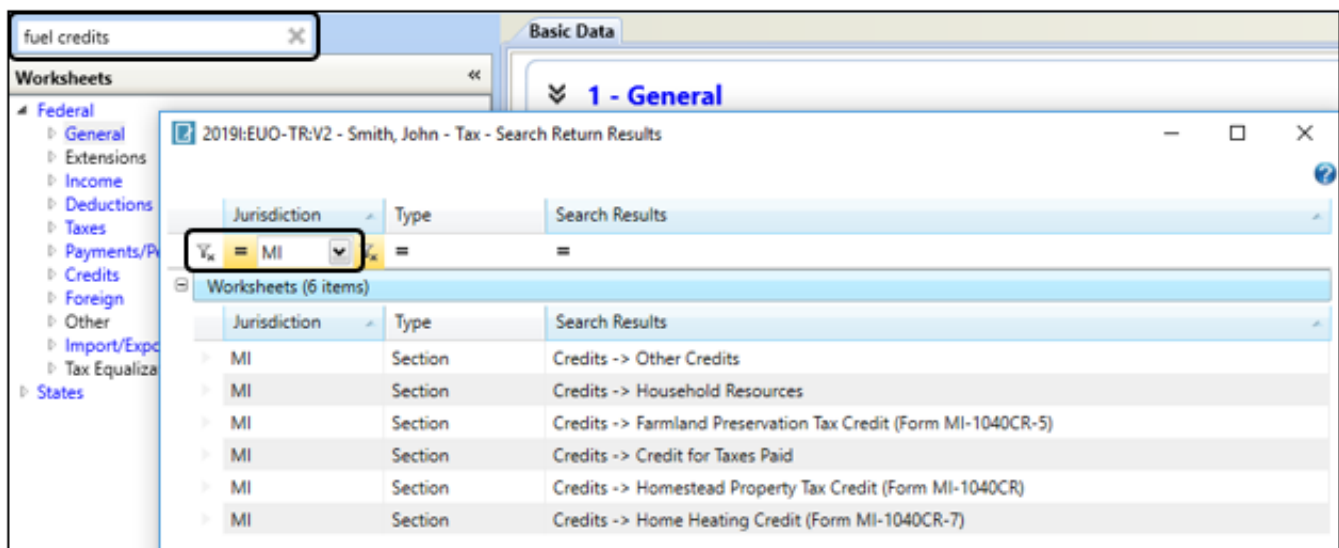
## Ribbon

CCH Access Tax uses the ribbon throughout the program. The commands you use the most appear together under tabs on the ribbon. The ribbon displays all commands based on the current location in Return Manager or in a return. You can minimize the ribbon by right-clicking a tab in the window and selecting Minimize the Ribbon from the menu.



## Search Return

*Search Return* produces an interactive results list (shown below) that can be filtered using the Jurisdiction Field. The results below are filtering from 1000 items down to the 6 worksheets shown.

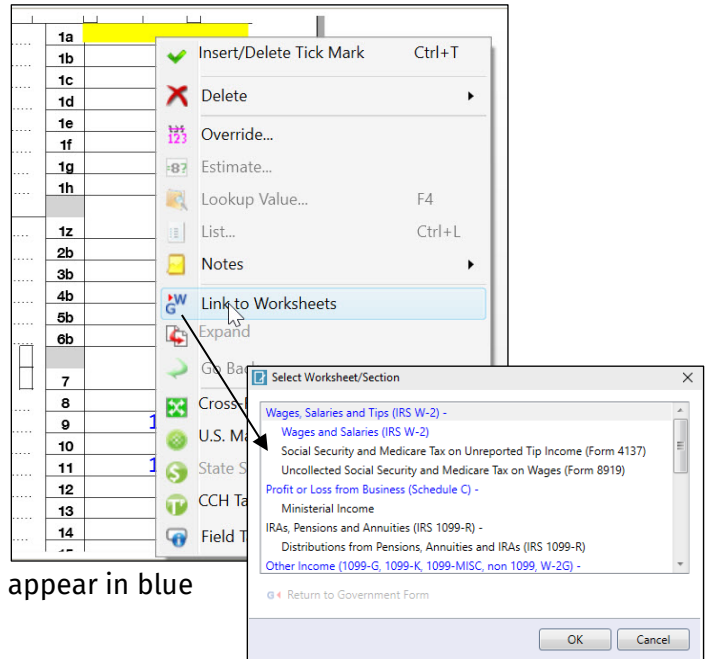


## Government to Worksheet Link

This tool allows you to link from a field on most federal and state Government forms to the underlying data entry field. You can use this tool by placing your cursor on a field in a Government form and selecting the **Link to Worksheet** button in the Navigation group on the Home ribbon.

You can also use the right-click menu and select **Link to Worksheet**

If data in the selected field comes from one source, the program takes you directly to the applicable worksheet. If data in the selected field comes from multiple sources (i.e., Form 1040, Line 1, Wages, Salaries, Tips, etc.), you get the Select Worksheet/Section window that shows all sources for that field. Sources that contain data appear in blue text.



When you select the appropriate section, the link takes you to the data entry field.

## Data Entry Features

### Summary Grids

Summary Grids are like spreadsheets on the screen. You can enter data into a Summary Grid. You can access additional fields by scrolling to the right. Add new rows by pressing the **Down Arrow** key or clicking the **Add** button in the upper right corner of each summary grid.

For entries that require more detail than what is available in the Summary Grid, click the **Detail** button to enter the additional information.

1 - Interest (IRS 1099-INT)

Detail Find

Row: 1 of 6

TSJ	Payer	Interest Income	U.S. Savings Bonds	Prior Year	Federal Tax Withheld	Investment Expenses	Early Withdrawal Penalty	Tax-Exempt Interest	Tax-Exer
J	ABC CO.	500		500					
J	BANK FINANCIAL	200		200					
J	CHASE	125		125					
S	MUNICIPAL BONDS			50				1,000	DEF
J	NATIONS BANK	3,000		3,000					
T	U.S. SAVINGS BONDS		350	350					
		3,825	350	4,225	0	0	0	1,000	

Sorting Data

You can sort the entries on each summary grid by clicking any of the column headings.

Summary Column Totals

At the bottom of each Summary grid, columns containing numeric data display the total of all entries in that column. These totals display as running totals while you enter data, making reconciliation easier while you work.

**Detail Worksheets**

Worksheet View uses IRS source document forms exclusively, where applicable, in the Detail worksheets. You can find all IRS facsimile forms in the first section of a detail worksheet, if applicable.

TSJ	FS	State	City	* Preparer's record, not used in return preparation		Prior year	
1	S					500.	
PAYER'S name, street address, city, state, ZIP code and phone no.		Payer's RTN (optional) *		<b>20XX</b> <b>Form 1099-INT</b>		<b>Interest Income</b>	
2 ABC CO.		3 INFO					
4		1 Interest income 500					
5		2 Early withdrawal penalty		<b>Form 1099-OID</b>		<b>Interest Income</b>	
6 Foreign province/st/cnty		3 Interest on U.S. Savings Bonds and Treas. obligations					
7 Foreign postal code		4 Federal income tax withheld		5 Investment expenses		1 Original issue discount	
8 Foreign country code		PAYER'S TIN 9 41-7879784		RECIPIENT'S TIN 999-77-6666		6 Foreign tax paid	7 Foreign country or U.S. possession
10 RECIPIENT'S name		11 Mary Smith				State Distribution Amount (OID)	
12 Street address (including apt. no.)		2700 LAKE COOK AVENUE					

If you have a long list of items, use the **Find** button to locate the item you want to edit. A dialog box allows you to pick the item from a list or search for the one you want using the **Find** tool.

You can also scroll through the available items using the navigation buttons on the navigation bar. The navigation bar displays a counter of the number of occurrences.

To return to the Summary grid, click the **Summary** button.

Find

1 ABC CO.

2 BANK FINANCIAL

3 CHASE

4 MUNICIPAL BONDS

5 NATIONS BANK

6 U.S. SAVINGS BONDS

OK Cancel

## Import/Export

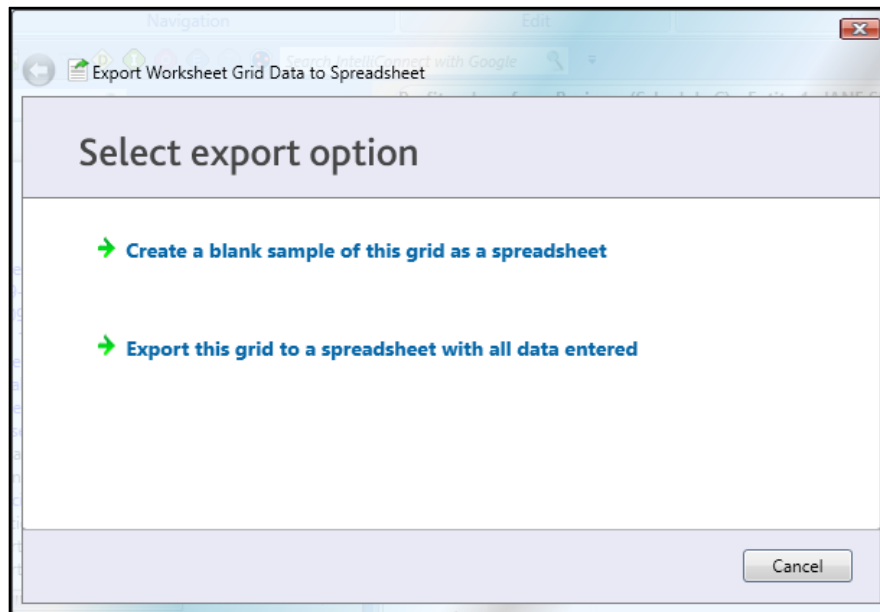
Share data between Worksheet Summary grids and Microsoft® Excel® spreadsheets using the import and export feature.

### Exporting

Start an export of a Worksheet Summary grid to a Microsoft® Excel® spreadsheet by clicking the **Export** button located on the grid navigation bar.

6 - Depreciation and Amortization (Form 4562)									
Totals									
Asset Number	Description	Date in Service	Method	Life / Rate	Cost or Other Basis	Accumulated Depreciation	Current Depreciation	Current Year Depreciation - Calculated	Section
1	EXECUTIVE DESK & CHAIR	12/31/99	MT	7.0000	11,000	1,000			
2	ANSWERING MACHINE	07/01/03	MT	7.0000	550				
3	SERVER SOFTWARE	06/01/05	A	60.0000	4,328	4,328			
4	LAPTOP COMPUTER	09/01/07	M	5.0000	3,295				
5	FURNITURE & FIXTURES	07/02/07	M	7.0000	10,000	5,000			
6	DESK	01/12/16	M	7.0000	2,500	0			
7	CONFERENCE ROOM PROJECTOR	05/08/16	M	7.0000	5,000	0			
8	NEW EQUIPMENT	02/15/19	M	5.0000	7,500				
<b>Totals</b>						44,173	10,328	0	0

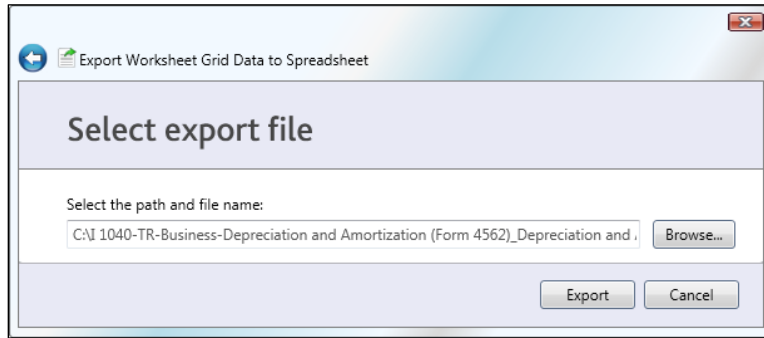
When you click the **Export** button, this window appears:



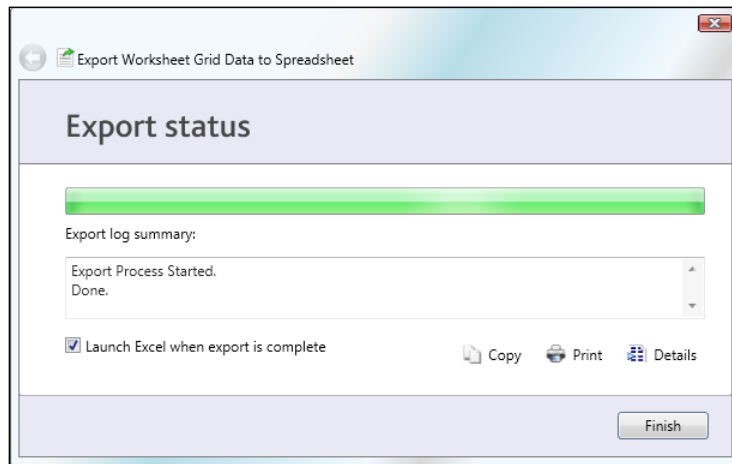
Choose to either export a Worksheet Summary grid with all the data on it or export a blank grid you can use as a template for importing data into the program.



A **Select export file** window allows the selection of a different location for each export.



After the green progress bar completes, select **Finish** and the Export opens the spreadsheet in Microsoft Excel automatically. The exported data fills the Microsoft Excel spreadsheet.



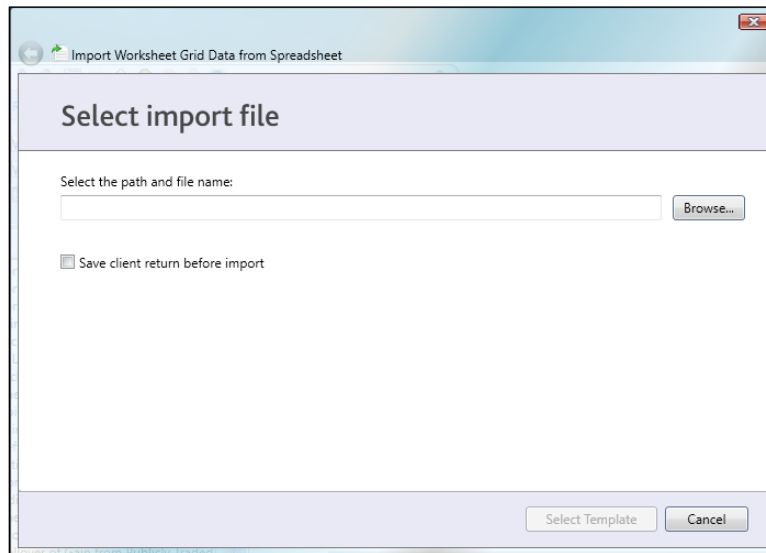
Asset Number	Description	Date in Service	Method	Life / Rate	Cost or Other Basis	Accumulated Depreciation	Current Depreciation	Current Year Depreciation - Calculated	Section 179 / Bonus	Real Prop 179
1	EXECUTIVE DESK & CHAIR	12/31/1999	Modified	7.0000	11000	1000				10000
2	ANSWERING MACHINE	7/1/2003	Modified	7.0000	550					550
3	SERVER SOFTWARE	6/1/2005	Amortiza	60.0000	4328	4328				
4	Laptop computer	9/1/2007	Modified	5.0000	3295					3295
5	Furniture & Fixtures	7/2/2007	Modified	7.0000	10000	5000				
6	Desk	1/12/2016	Modified	7.0000	2500	0				2500
7	Conference Room Projector	5/8/2016	Modified	7.0000	5000	0				5000
8	NEW EQUIPMENT	2/15/2017	Modified	5.0000	7500	750	1200	1200		

The Return ID and the Worksheet Category and Section titles appear on the Microsoft Excel spreadsheet.


Edit the spreadsheet in Microsoft Excel and import it back into the tax return.

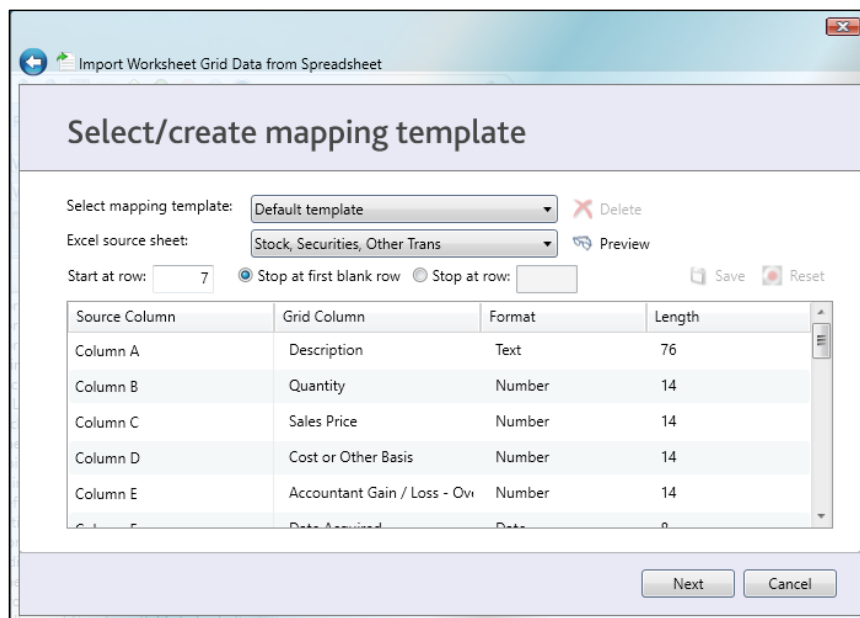
## Importing

To begin the import, click the **Import** button on the grid navigation bar. The **Worksheet Import Wizard** window appears.

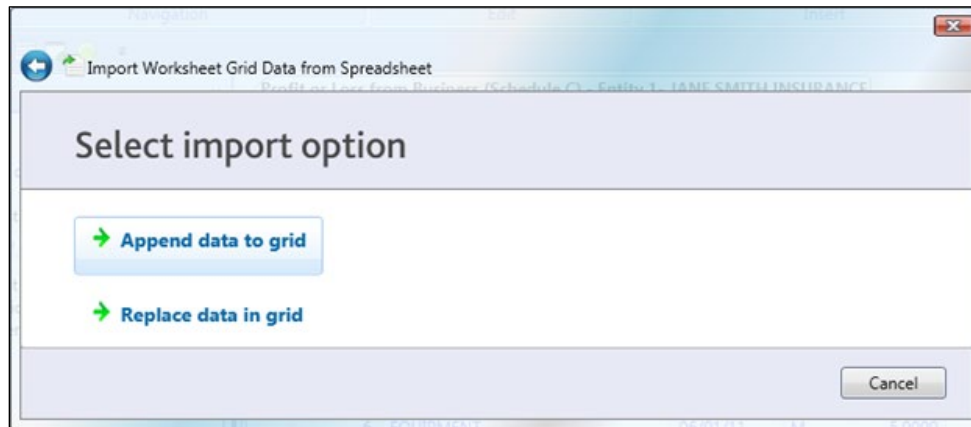


The window allows you to browse for your Microsoft Excel spreadsheet to import into the tax return. Click **Select Template** and the Wizard takes you to the **Select/Create mapping template** screen.

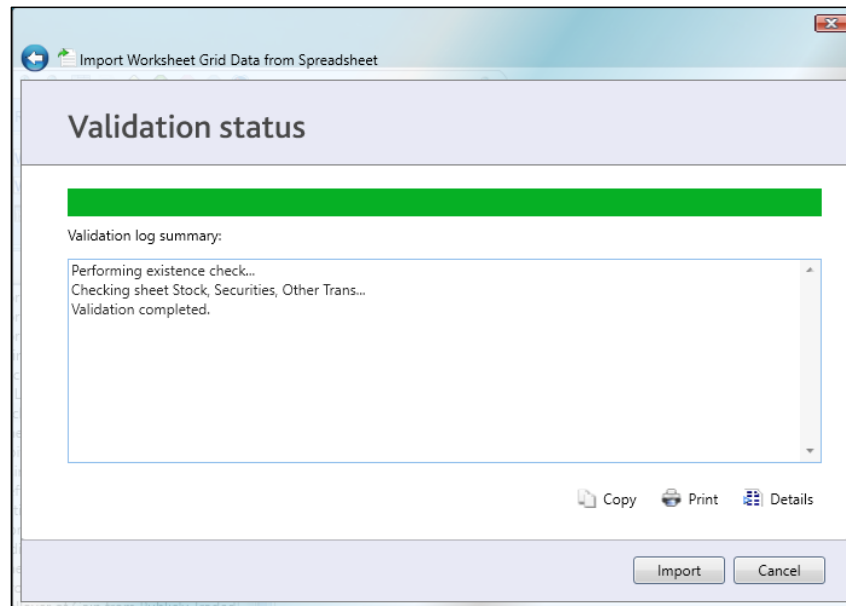
 As a best practice, check the box *Save client return before import*.



When you complete the mapping, click **Next**. A window appears with the option to *Append* or *Replace the data in the grid*.



Replacing data deletes all the data in the Summary grid and all associated detail data. Additionally, any data imported into prior year data cells overlay ALL data in those corresponding cells.



Select **Import** to complete the Import.

### Paste Special

As an alternative to importing data from Excel, you can paste data copied from Excel and other applications into the worksheet grids. You can paste data into a single field or multiple fields at one time. Data to be pasted into multiple fields should be tab-delimited or in tabular format.

From the source file, select and copy the data that you want to paste into the grid. To paste the selected data into the grid fields, click the cell where you want to start the paste and click the **Paste Special** button on the upper right side of the summary grid. You can also right-click the cell where you want to begin the paste and select **Paste Special**.


6 - Depreciation and Amortization (Form 4562) Totals

Detail Find Row: 1 of 5

Asset Number	Description	Date in Service	Method	Life / Rate	Cost or Other Basis	Accumulated Depreciation	Current Depreciation
1	EXECUTIVE DES...	12/31/1999	Modified ACRS ...	7.0000	11000	1000	
2	ANSWERING M...	7/1/2003	Modified ACRS ...	7.0000	550		
3	SERVER SOFTW...	6/1/2005	Amortization	60.0000	4328	4328	
4	Laptop computer	9/1/2007	Modified ACRS ...	5.0000	3295		
5	Furniture & Fixt...	7/2/2007	Modified ACRS ...	7.0000	10000	5000	
6	Desk	1/12/2016	Modified ACRS ...	7.0000	2500	0	
7	Conference Ro...	5/8/2016	Modified ACRS ...	7.0000	5000	0	
8	NEW EQUIPME...	2/15/2017	Modified ACRS ...	5.0000	7500	750	1200
9							

The program validates the pasted data and then displays a preview window showing the first 1,000 rows of pasted data. An error icon displays the next failed validation data. Hovering the pointer over the icon displays a description of the issue. Unless the errors are corrected, only data without errors will be pasted.

Paste into Worksheet Grid Preview

Review the worksheet grid columns in which to paste data.  
The  icon indicates data with errors. Click **Details** to view information for each error, or click **Paste** to continue pasting any data that does not have errors.

	Asset Number	Description	Date in Service	Method	Life / Rate	Cost or Other Basis	Accumulated Depreciation	Current Depreciation	Cur Deprec Calc
▶	1	EXECUTIVE DES...	12/31/1999	Modified ACRS ...	7.0000	11000	1000		
	2	ANSWERING M...	7/1/2003	Modified ACRS ...	7.0000	550			
	3	SERVER SOFTW...	6/1/2005	Amortization	60.0000	4328	4328		
	4	Laptop computer	9/1/2007	Modified ACRS ...	5.0000	3295			
	5	Furniture & Fixt...	7/2/2007	Modified ACRS ...	7.0000	10000	5000		
	6	Desk	1/12/2016	Modified ACRS ...	7.0000	2500	0		
	7	Conference Ro...	5/8/2016	Modified ACRS ...	7.0000	5000	0		
	8	NEW EQUIPME...	2/15/2017	Modified ACRS ...	5.0000	7500	750	1200	1200
	9								

Number of errors: 0 warnings / errors Details

Paste Cancel

To view more information about an item with the failure icon, click **Details**. To correct validation errors, click **Cancel**, edit the data in the source file, and then repeat this procedure. Otherwise, finalize the data paste by clicking **Paste**.



You cannot undo a completed paste into a worksheet grid. To remove data after a paste is completed; you either must close the return without saving your changes or manually delete the information.

## Lookup Value

Some fields have a list of pre-defined valid entry options.

These include:

Yes and No options boxes

A screenshot of a dropdown menu. The selected option is 'N'. The menu items are: 'Per Office Manager/RCS (Default)', 'Y Yes', and 'N No'.

Numbered options lists

A screenshot of a dropdown menu. The selected option is 'Entry in Office Manager/RCS (Default)'. The menu items are: 'Entry in Office Manager/RCS (Default)', '1 Print both line 1 and line 65', '2 Print line 1 only', '3 Print line 65 only', and '4 Do not print control information'.

To access a list of these valid entry options for a field in a Worksheet, open the Worksheet. Position the cursor on the field or box where you want to access the multiple-entry options.

To view the **Lookup Value** list of valid entries:

- Click the down arrow to the right of the field, or
- Double-click, or
- Select **Lookup Value** in the Insert group on the Home ribbon, or
- Press **F4**, or
- Right-click and choose **Lookup Value** from the menu

To search for an entry in a long list of possible code entries, click the **Search** field on top of the lookup dialog box. Type the entry and click the search button or the enter key. Highlight the desired entry, click **OK** and the entry appears in the box.

A screenshot of a dialog box titled 'Code, Box 12'. The dialog box has a search bar at the top right with the text 'Search' and a magnifying glass icon. Below the search bar is a table with two columns: 'Code' and 'Description'. The table contains the following entries:

Code	Description
A	Uncollected social security or RRTA tax on tips
B	Uncollected Medicare tax on tips
C	Taxable cost of group-term life insurance over \$50,000
D	Elective deferrals to a section 401(k) cash or deferred arrangement
D1	Preceding year USERRA makeup contribution
D2	2nd preceding year USERRA makeup contribution
D3	3rd preceding year USERRA makeup contribution
D4	4th preceding year USERRA makeup contribution
D5	5th preceding year USERRA makeup contribution
D6	6th preceding year USERRA makeup contribution
D7	7th preceding year USERRA makeup contribution
D8	8th preceding year USERRA makeup contribution
D9	9th preceding year USERRA makeup contribution

At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'.



## Notes

There are two types of notes available: Field Notes and Return Notes. A field-level note attaches to a specific field, while the Return Note applies to the overall tax return. These notes print in the Accountant's copy of the return as an audit trail.

Field-level notes display a blue indicator in the lower left corner of the field to identify that you attached a note.

### Steps to Create a Note:

1. Position the cursor in the field where you want the note if it is a field-level note.
2. Click the **Field Note** or **Return Notes** button in the Insert group on the Home ribbon or select from the right-click menu.
3. Modify the caption to customize the description to identify the note in the Accountant's copy of the return.
4. Enter the note or paste contents from the clipboard by pressing **CTRL+V** or right-click and choose **Paste**.
5. Click **OK** to save and exit the note.

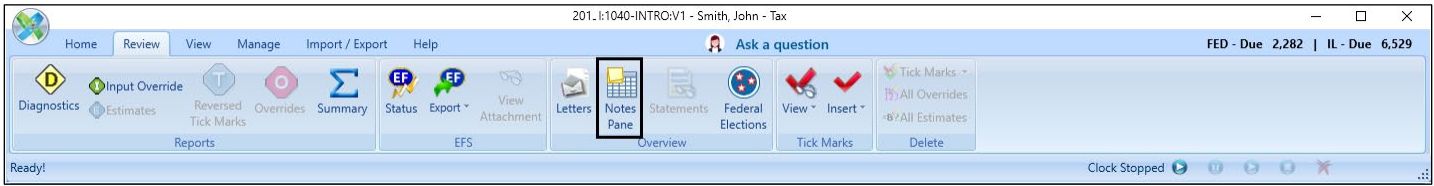
You can characterize a note as one of these note types:

- Preparer
- Reviewer
- Notes to Next Year
- Missing Items

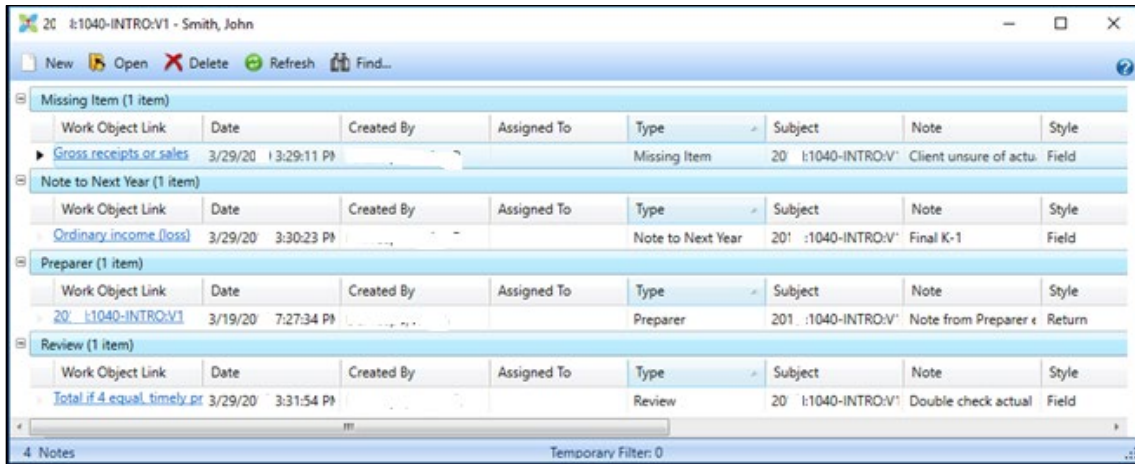
In addition, you can assign Notes to staff members for required resolution. The program tracks the date created and the cleared date.

Review and Missing Item notes are deleted during the roll forward process. Notes to next year carry forward to next year only and Preparer notes are saved until deleted.

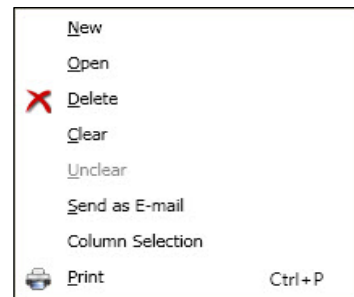
After you enter and save notes using the Tax Note window, manage the notes in a grid format so they can be reviewed in the Notes Pane. The grid displays relevant information about each note, such as the subject, style, status, creator, and date and time detail. To go directly to a note in the grid, use the link provided in the Work Object Link column.



With the Notes Pane grid, you can sort by column header and search the grid using the Find option.

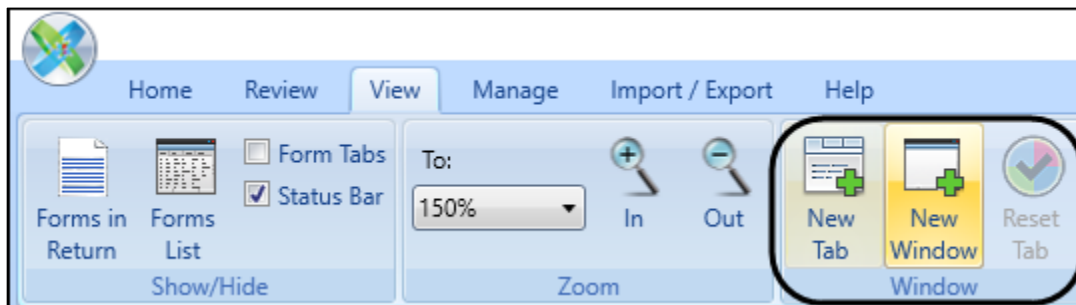


The right-click menu allows quick access to the available commands for each note.

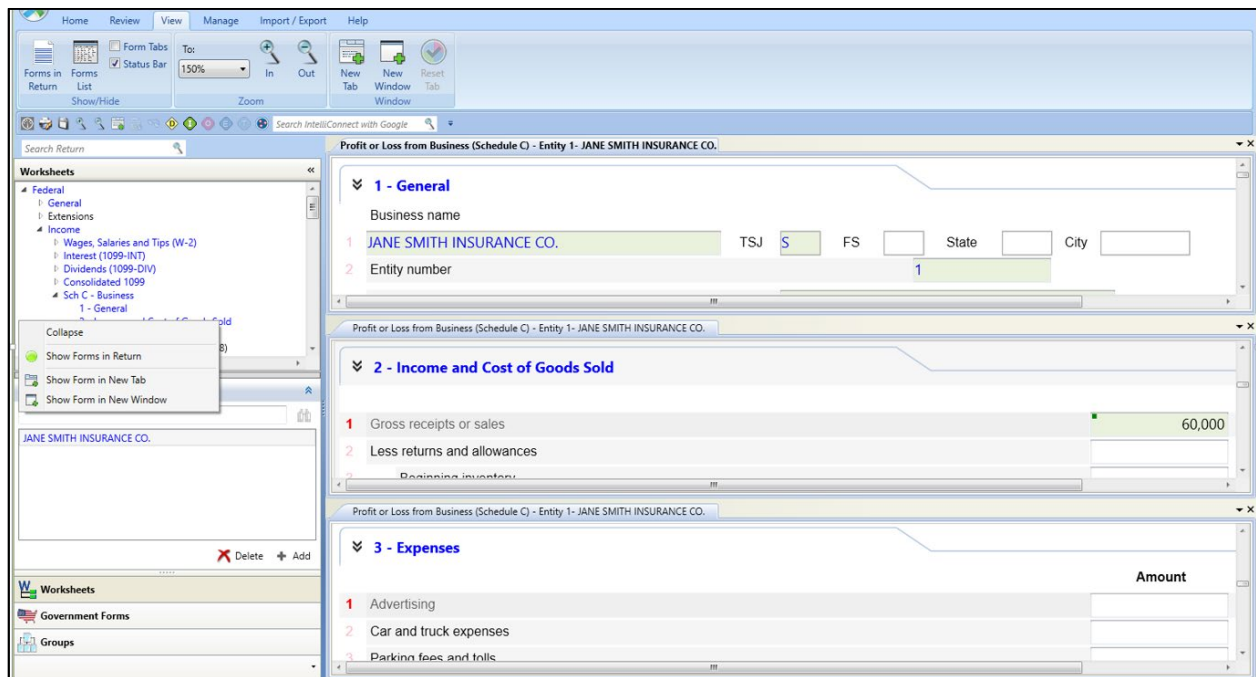


## Windows and Tabs

The Window section of the View ribbon contains three options that allow you to open a maximum of **four** tabs or floating windows for each open return. The tabs remain fixed in the main tax return window; however, the floating windows can be positioned to float above the main tax return window. You can place the floating window on a different monitor, to view multiple worksheets or government forms at the same time.



Right-click a worksheet in the Navigation Pane and select **Show Form in New Tab** or left-click and select **New Tab** on the View ribbon. This opens the worksheet and displays the new tab below the ribbon. Right-click the tab and select **Floating** to display the worksheet in its own window. You can also left-click the tab and drag it downward to create the floating window. Place this window on another monitor by dragging it to the desired location. When the tab changes to a floating window, the tab closes. Right-click the window header to choose to close the window or change it to a Tabbed Document. When you select more than one New Horizontal Tab Group or New Vertical Tab Group from the tab options, multiple worksheets will display in the program window.



After creating a tab group, you can choose to move the tab to another group from the right-click menu.

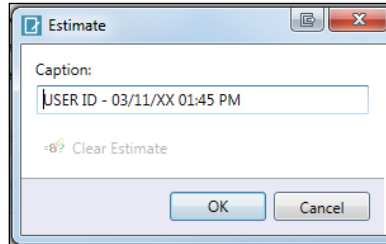


The **Expand** and **Link to Worksheets** options are available on the Home ribbon when viewing a government form. Both features open in a new window and count towards the maximum of four windows or tabs that you can have open for each return.

## Estimates

Use the Estimate tool when you want to enter a projected number in a field. A separate report identifying all the estimates in the return prints in the Accountant's copy of the return.

To enter an estimate, place the cursor in the amount field that you want to mark as an estimate. Click the **Estimate** button on the Home ribbon or select from the field's right-click menu. Edit the caption and click OK to enter the estimated amount in the field.



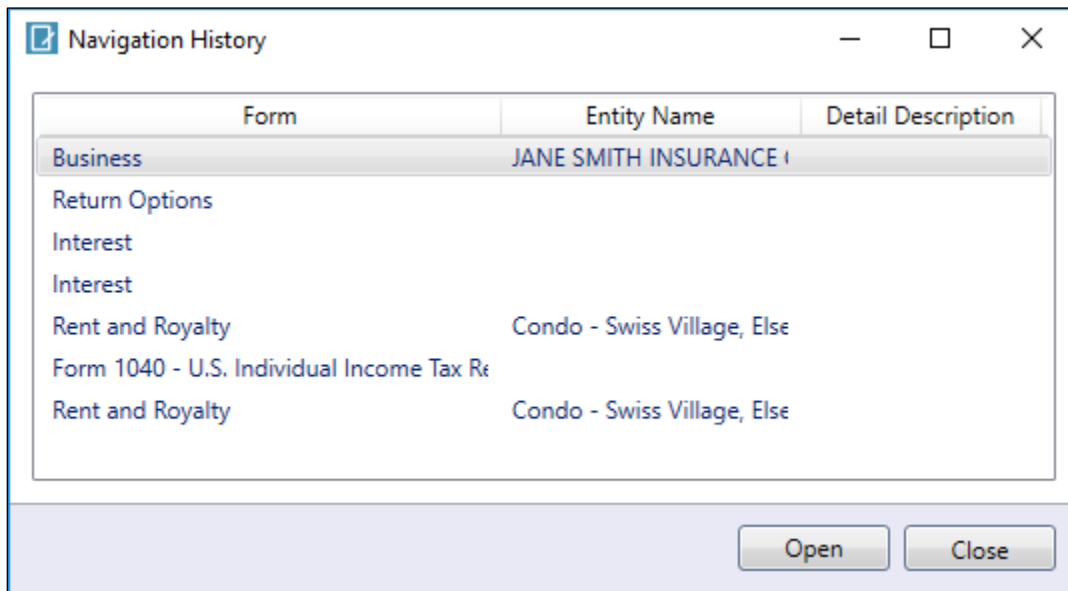
When you move the cursor off this field, the estimated amount appears in an orange color identifying it as an estimate. When estimated numbers are present in the return the **Estimate Summary** button on the Review ribbon becomes active.

Rent and Royalty (Schedule E) - Entity 1 - Condo - Swiss Village, Elsewhere, CO			
3 - Expenses			
	Amount	Ownership %	Expense Code
1 Advertising	5,000		Defaults to IRS treatment of expense
2 Auto and travel			Defaults to IRS treatment of expense
3 Cleaning and maintenance			Defaults to IRS treatment of expense
4 Commissions			Defaults to IRS treatment of expense
5 Insurance	2,500		Defaults to IRS treatment of expense
6 Legal and other professional fees			Defaults to IRS treatment of expense
7 Management fees	3,000		Defaults to IRS treatment of expense
8 Mortgage interest paid to financial institutions (Form 1098 received)	10,000		
9 Other mortgage interest paid			
10 Other interest			Defaults to IRS treatment of expense
11 Investment interest carryover			
12 Investment interest carryover - state if different			
13 Repairs	6,000		Defaults to IRS treatment of expense
14 Supplies	500		Defaults to IRS treatment of expense
15 Taxes			

## Navigation History

The program maintains a history of worksheets and Government forms that you accessed during a Tax Preparation session. Every time you open and close a Worksheet or Government form, the program adds a record to a session history file. The record includes the form and entity name.

The history file maintains a maximum of 1,000 records. When you reach the maximum, the oldest record drops off as you open new worksheets or forms and add new records. Access the history by selecting the **Navigation History** button in the History area of the Home ribbon.



The **Back** and **Forward** buttons in the History area of the Home ribbon allow you to navigate easily through the history file.



The program deletes the Navigation History when you close the return.

## Deleting Data

To remove data entry from the Worksheets, use the delete key or click the **Delete** button from the Edit area of the Home ribbon. A right-click menu is also available. Depending on the current field location and the contents of the return data, the delete options include:

- Field
- Row
- Section
- Entity
- Worksheet
- Tax Authority

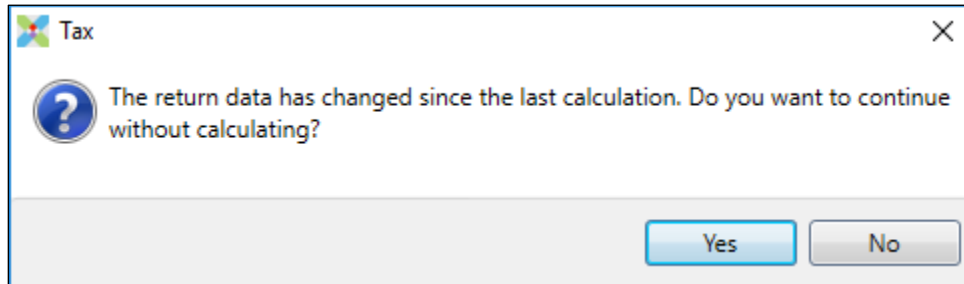
Click **Yes** to confirm the deletion process or click **No** to cancel the deletion process.

## Calculating

Calculate a return by clicking the **Calc** button in the Process group on the Home ribbon or on the Quick Access Toolbar. The **Calc** button calculates the entire return. To calculate the federal return only, select the **Calc** button drop-down and choose **Federal Only** on the list.

After calculating both the federal and state returns, the Calc option is inactive. If you change data, the Calc option is available again.

If you attempt to print a return that needs calculating, a warning message displays reminding you that data changed in the return since you calculated last. Answer **No** and calculate the return before printing.



When the calculation completes, all open form windows automatically refresh with the results of the calculation. If the data changes in a field that has a tick mark, tick marks on Government forms change from a colored tick mark against a white background to a white tick mark against a colored background; tick marks in a worksheet field disappear when the return data changes.



The **Calc** button is available any time data in the return is changed, added, deleted, or altered.

## Return Group

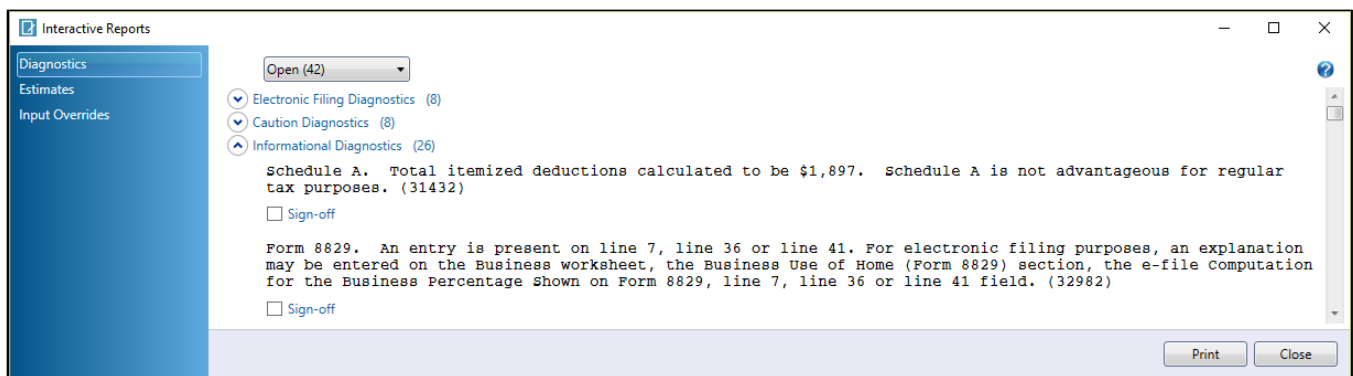
Calculate all returns in a corporate consolidation by selecting **Calc/Return Group** in the Process group on the Home ribbon.

## Reviewing Returns

### Interactive Diagnostics

The Interactive Diagnostics window displays a list of the diagnostics generated with each return calculation. You can view the diagnostics while working on a worksheet, and you can move between the diagnostic summary and the field that generated the diagnostic. At the end of each diagnostic a 5-digit number appears in parentheses, use this number when contacting support for assistance with a diagnostic.

- **Electronic Filing** – The return does not qualify for electronic filing. Review the return closely in the areas identified. You must make the necessary changes before you can export the electronic file.
  - Code 4XXXX issued when e-filing Federal and state tax returns
  - Code 5XXXX issued when e-filing extensions, Form 114 (FBAR) and various state form filings
  - Code 6XXXX issued when e-filing Federal and state tax returns
- **Warning** – The return contains at least one problem that may cause your return results to be incorrect. Review the return closely in the areas identified. Make any necessary changes before completing the return.
  - Code 1XXXX issued for all Federal, state and local forms
- **Caution** – The return may be in error due to a data entry error, input omission or conflicting entries. Review the return closely in the area identified as well as any related areas to justify your entries. Make any applicable changes before completing the return.
  - Code 2XXXX issued for all Federal, state and local forms
- **Informational** – The diagnostics contain information provided for your use.
  - Code 3XXXX issued for all Federal, state and local forms

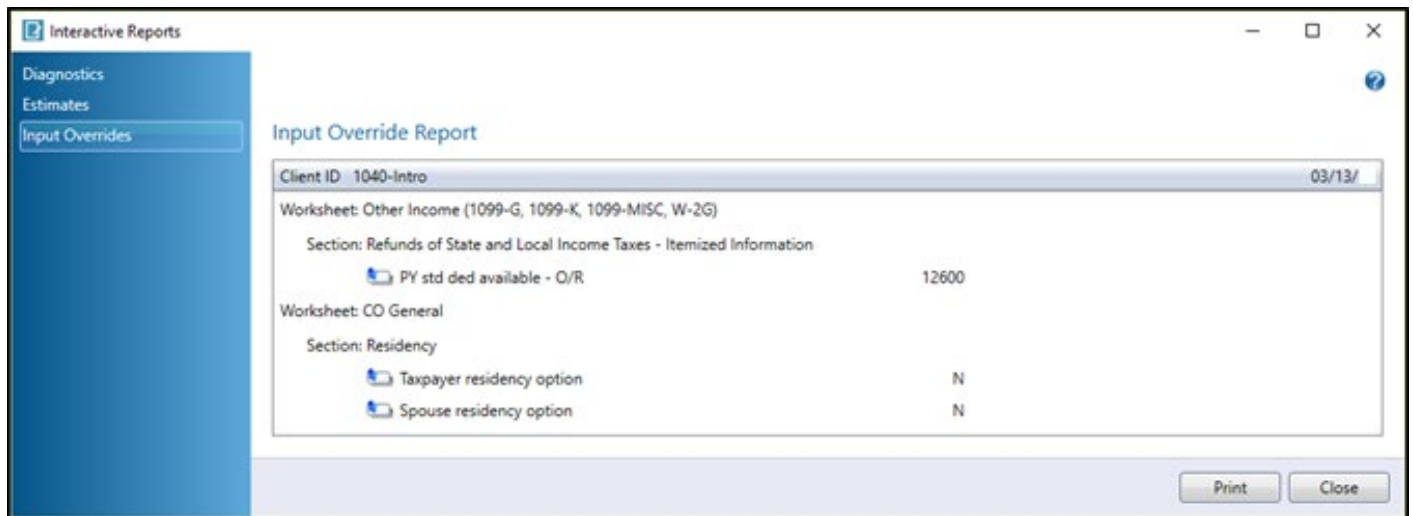


### Steps to Use Interactive Diagnostics:

1. Click the **Diagnostics** button on the toolbar or select **Diagnostics** from the Review ribbon. If you are in Government view when you access the diagnostics, the diagnostic references government forms. If you are in Worksheet view, the references are to the Worksheets.
2. Interactive diagnostics are designated with a blue pointer to the left of the diagnostic.
3. Double-click the blue pointer and the software opens to where the correction or modification most likely needs to be made.
4. Make the change in the field.
5. Repeat the same steps to address other Interactive Diagnostics.
6. You can sign off on both the caution and informational diagnostics. Once the Sign-off box is checked the diagnostics will be moved to the signed-off view and will display the user ID, date and time. A menu selection is available at the top of the diagnostic report that allows you to view All diagnostics, Open diagnostics or Signed-off diagnostics
7. When you are finished, close the Diagnostics window.

### Interactive Input Overrides

An Interactive Input Override report lists the overrides used in the data entry fields. Access the Interactive Input Override report by clicking the **Input Override** button in the Reports group on the Review ribbon.



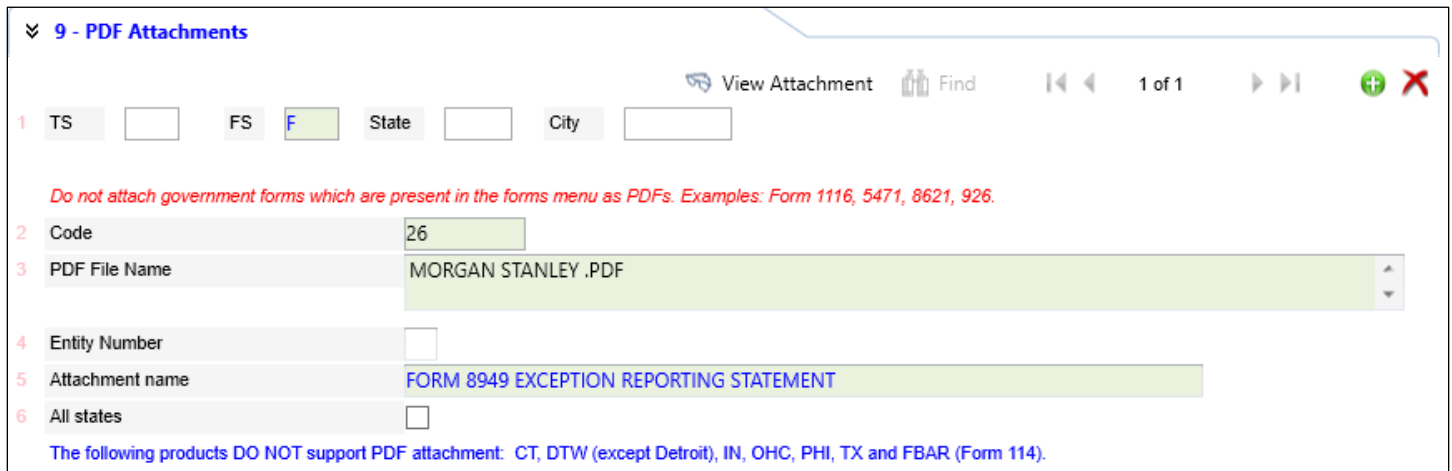
The screenshot shows a software window titled "Interactive Reports" with a sidebar containing "Diagnostics", "Estimates", and "Input Overrides". The main area displays an "Input Override Report" for Client ID 1040-Intro, dated 03/13/. The report lists two worksheets with their respective sections and overrides:

Worksheet	Section	Override	Value
Other Income (1099-G, 1099-K, 1099-MISC, W-2G)	Refunds of State and Local Income Taxes - Itemized Information	PY std ded available - O/R	12600
CO General	Residency	Taxpayer residency option	N
		Spouse residency option	N

Buttons for "Print" and "Close" are visible at the bottom right of the report area.

## PDF Attachments

The IRS accepts PDF attachments in the electronic file. Double-click the *PDF File Name* field at **General > Electronic Filing > PDF Attachments** to open the Attach File dialog. Select the source location of the file you want to attach and click Continue. Browse for the file in the Attach File window and click Open. The file name is entered in the *PDF File Name* field.



9 - PDF Attachments

View Attachment Find 1 of 1

1 TS  FS  State  City

*Do not attach government forms which are present in the forms menu as PDFs. Examples: Form 1116, 5471, 8621, 926.*

2 Code

3 PDF File Name

4 Entity Number

5 Attachment name

6 All states

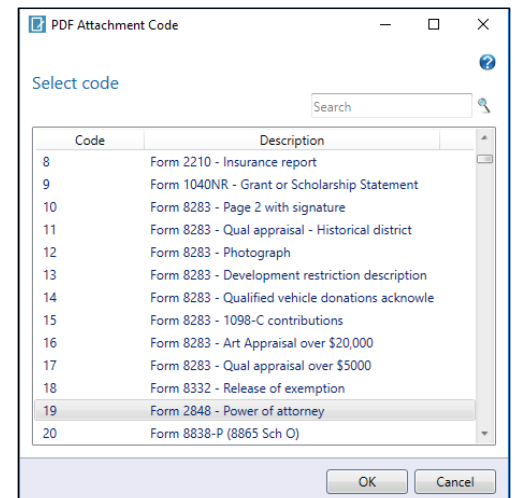
The following products DO NOT support PDF attachment: CT, DTW (except Detroit), IN, OHC, PHI, TX and FBAR (Form 114).

**Code** – The program uses the PDF Code to associate a PDF attachment with the form it supports. For federal form-specific PDF attachments, this entry is required. Optional attachments for states do not need to use a code unless one specifically exists for the attachment.

**PDF File Name** – Double-click this field to browse for the PDF attachment.

**Attachment Name** – You must enter an attachment name. If you enter a Code, this field fills automatically with a name specified by the IRS, and you cannot modify the name. Limit your entry for the IRS attachment name to 60 characters.

**All States** – If you check this box, the program includes the PDF attachment for all states in the electronic file.



PDF Attachment Code

Select code

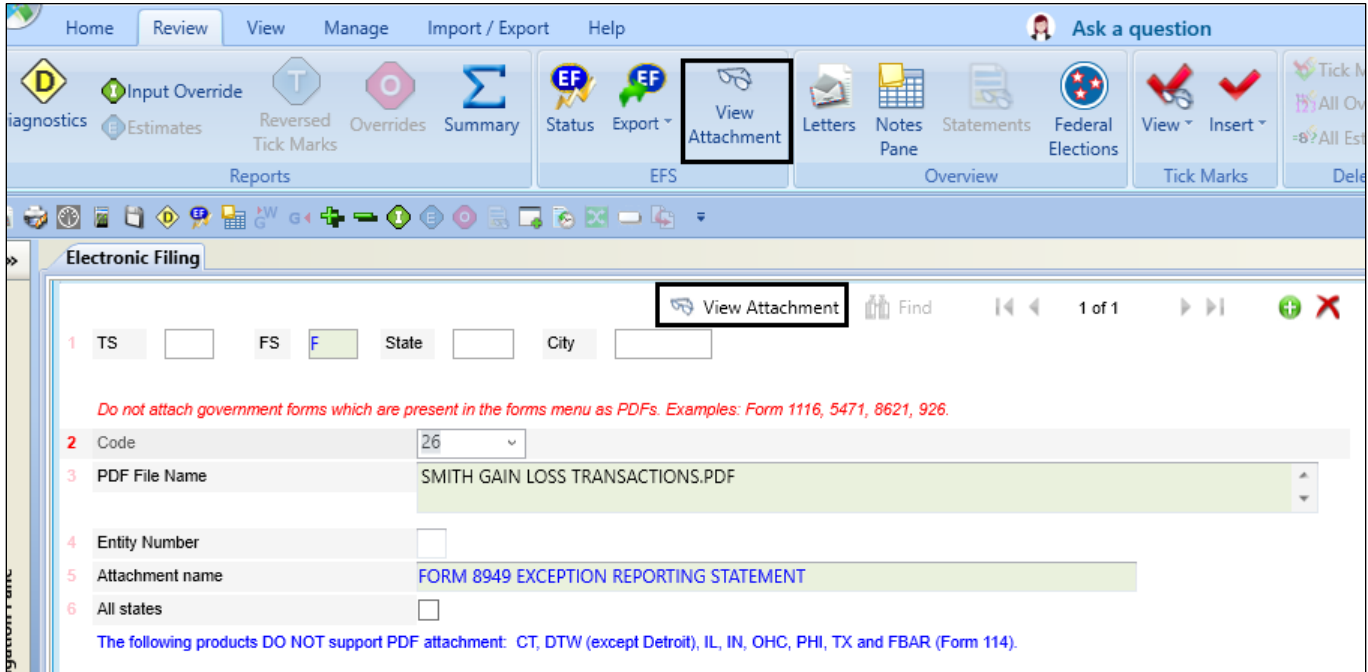
Search

Code	Description
8	Form 2210 - Insurance report
9	Form 1040NR - Grant or Scholarship Statement
10	Form 8283 - Page 2 with signature
11	Form 8283 - Qual appraisal - Historical district
12	Form 8283 - Photograph
13	Form 8283 - Development restriction description
14	Form 8283 - Qualified vehicle donations acknowle
15	Form 8283 - 1098-C contributions
16	Form 8283 - Art Appraisal over \$20,000
17	Form 8283 - Qual appraisal over \$5000
18	Form 8332 - Release of exemption
19	Form 2848 - Power of attorney
20	Form 8838-P (8865 Sch O)

OK Cancel

## Viewing and Printing Attachments

To view PDF attachments while working in the return, click the **View Attachment** button in the EFS area of the Review Tab ribbon. You are also able to view the attachments by selecting the **View Attachment** button at General > Electronic Filing > PDF Attachments.

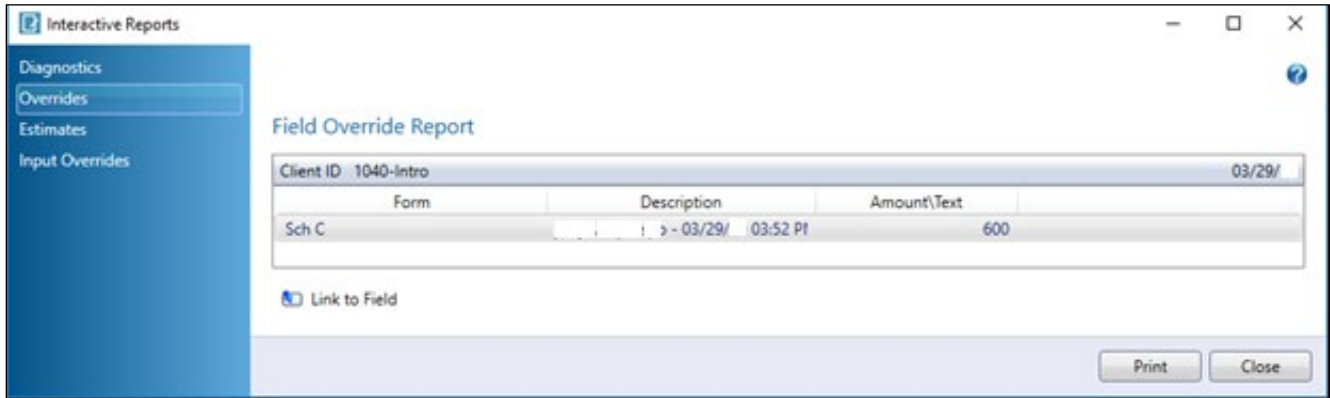


## Interactive Overrides

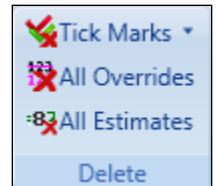
The Interactive Overrides tool provides a list of the Government form overrides in a return. You can view the overrides while working on a form, move between the override summary and the field where you entered the override and change the entry, if necessary.

### Steps to Use Interactive Override:

1. Click the **Overrides** button in the Reports group on the Review ribbon.
2. To review or edit an override, do the following select an override and click **Link to Field**.
3. The override links to the applicable form field in a separate window, allowing you to correct the missing or incorrect information. You must activate the override before editing the entry.
4. Make changes to the override, as necessary.
5. Repeat steps 3 and 4 to review or edit other overrides.
6. When finished, click **Close** to exit the Field Override Report.



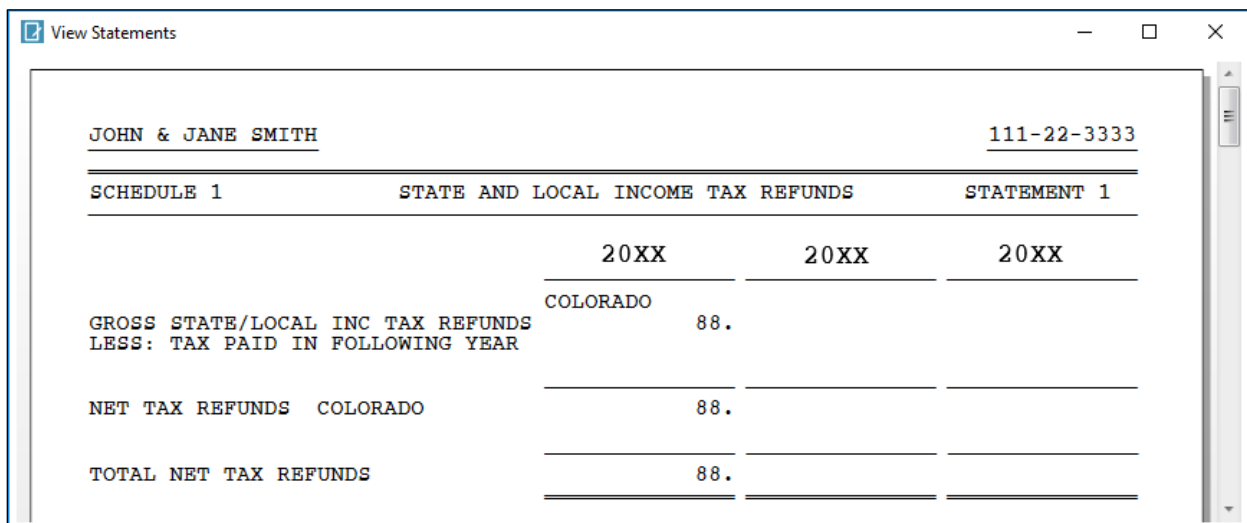
To clear all Government View overrides in the return, select All Overrides in the Delete group on the Review ribbon. You cannot recover overrides that you remove. Clearing all overrides removes the overrides and the amounts change, if appropriate, following the next calculation when program-calculated amounts display.



As a best practice, we do **NOT** recommend using government view overrides.

## Viewing Statements

You can review supporting statements for a specific Government form by selecting the **Statements** button in the Overview group on the Review ribbon. When viewing the statements, you can print them, copy them to the Windows Clipboard, or click **Close** to exit the Statement view. You must open the Government form before you can view the statements.



You can also view a specific line's statement by clicking on the **Stmt** or **Statement** link next to the number on the Government form.

<b>Income</b>	<b>1a</b> Total amount from Form(s) W-2, box 1 (see instructions) ..... <a href="#">Stmt</a>	<b>1a</b>	<b>125,000.</b>
	<b>b</b> Household employee wages not reported on Form(s) W-2	<b>1b</b>	

JOHN & JANE SMITH		111-22-3333				
FORM 1040	WAGES RECEIVED AND TAXES WITHHELD			STATEMENT 2		
T S EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICARE TAX
S HARTFORD INC.	55,000.	5,500.	2,750.		3,720.	870.
T GLOBAL OIL COMPANY	70,000.	7,000.	3,500.		4,960.	1,160.
<b>TOTALS</b>	<b>125,000.</b>	<b>12,500.</b>	<b>6,250.</b>		<b>8,680.</b>	<b>2,030.</b>

### Using Tick Marks

Use Tick Marks to track items that you reviewed on Government Forms or Worksheets. To use this tool, click **View** in the Tick Marks group on the Review ribbon and select All, Active, or None. The default description for the **red** Tick Mark is First Review; Second Review for the **blue** Tick Mark; and Third Review for the **green** Tick Mark. The color of the **Tick Mark** button on your toolbar indicates your active tick mark.



Customize the descriptions for each Tick Mark color from the Dashboard at **Application Links > Firm Settings and defaults – Tax > Options > Tick Marks**.

TSJ	Payer	Interest Income	U.S. Savings Bonds	Prior Year	Federal Tax Withheld
J	ABC CO.	500		500.	
J	CHASE	125		125.	
S	MUNICIPAL BONDS	0		5,000.	
J	NATIONS BANK	3,000		3,000.	
T	U.S. SAVINGS BONDS	0	350	350.	
		<b>3,625</b>	<b>350</b>	<b>8,975</b>	<b>0</b>

1	Wages, salaries, tips, etc. Attach Form(s) W-2					1	125,000.
2a	Tax-exempt interest	2a	5,000.	b	Taxable interest	2b	8,975.
3a	Qualified dividends	3a	110.	b	Ordinary dividends	3b	140.
4a	IRAs, pensions, and annuities	4a		b	Taxable amount	4b	

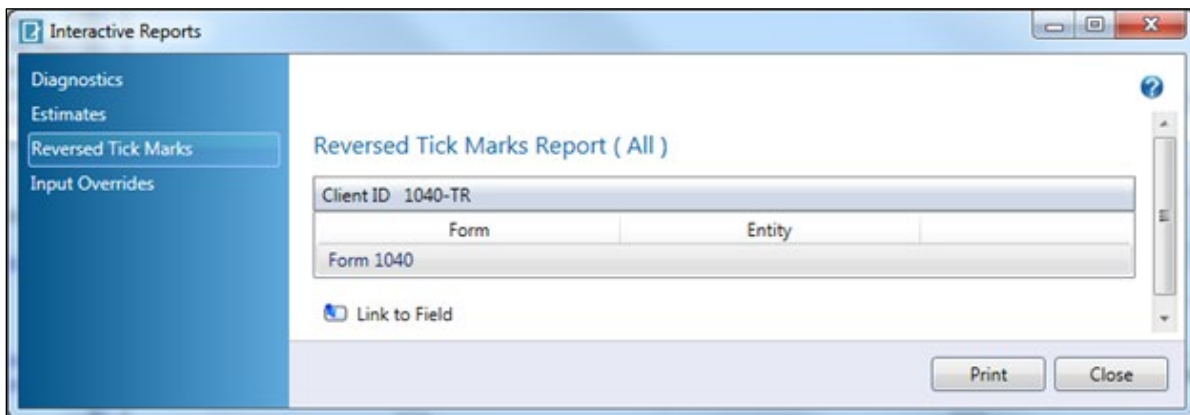
When you recalculate a return, the program checks the fields containing tick marks to see if the entries changed. If the data changes on Government form fields with a tick mark, the tick mark colors reverse. They display in reverse video. Tick marks on worksheets disappear when the data in the field is changed.



Tick marks only print on the Accountants copy of the return when selected.

## Interactive Reversed Tick Marks

Tick marks display in reverse on Government forms any time you make a change to a tick-marked field. The interactive **Reversed Tick Marks** report on the Review ribbon makes it easier for you to locate these fields. This report works the same way as the interactive Diagnostics Overrides reports.



Highlight an item on the report and select Link to Field to link to the applicable form field in a separate window, allowing you to review the changed data.



## Letters and Filing Instructions

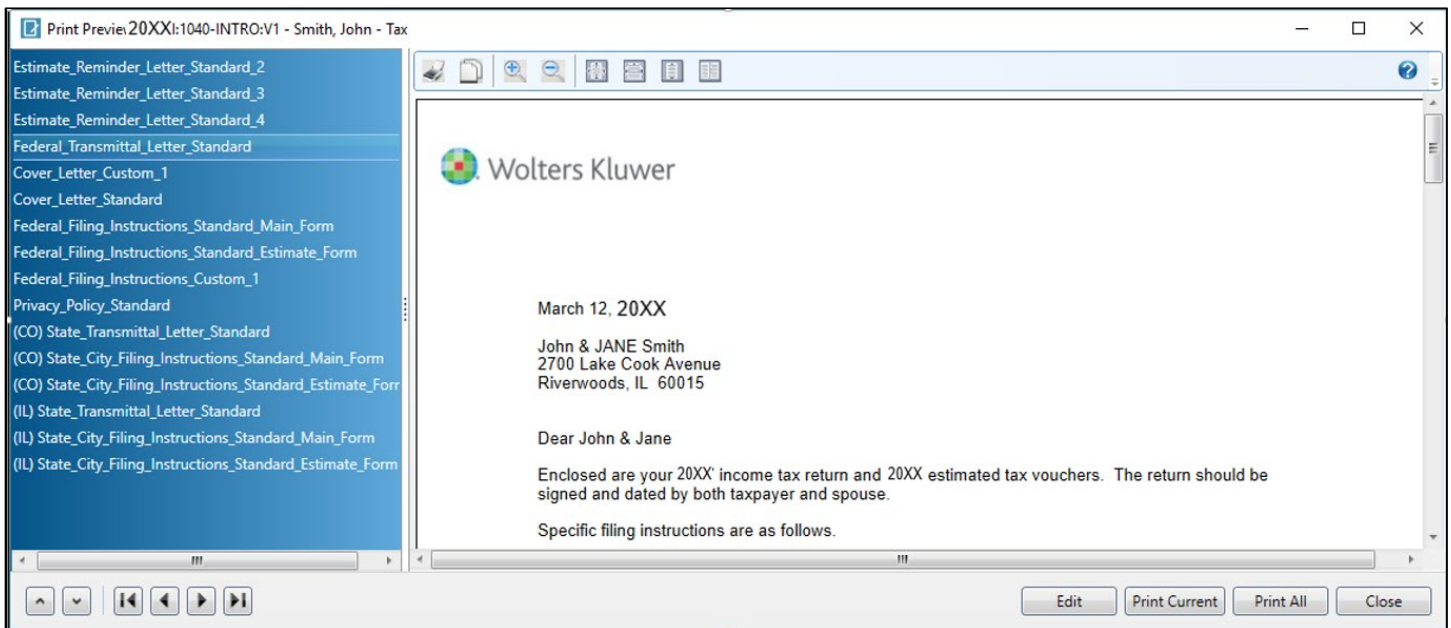
### Viewing Letters

Click the **Letters** button in the Overview group on the Review ribbon to pick the desired letter from the **Print Preview** dialog box.

To view a letter or filing instruction, click the item in the navigation pane on the left. You can also manage the printing sequence by using the up and down arrows on the lower left of the Print Preview screen.

The types of letters available include:

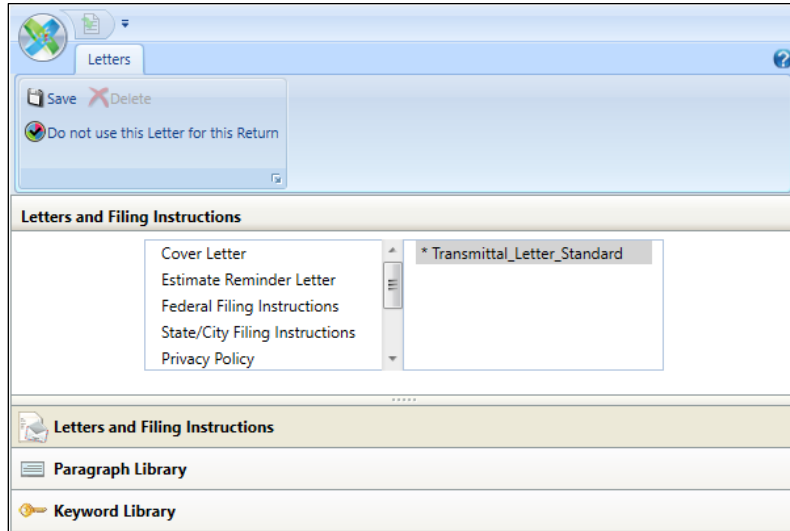
- Transmittal Letter
- Cover Letter
- Standard Filing Instructions
- Alternate Filing Instructions
- Privacy Policy
- Estimate Letter
- Extension Letter
- 5500 Letter
- K-1 Letter
- Summary Annual Report




You can also separately copy to the clipboard, print or edit Letters and Filing Instructions in Correspondence Manager.

## Editing Letters in a Return

When you open Correspondence Manager in a return, the Word Pane shows the letter you selected. On the Navigation Pane, the *Letter Template Library* changes to *Letters and Filing Instructions* where you can choose the letter you want to edit.



 Wolters Kluwer

April 10, 20XX

John & JANE Smith  
2700 Lake Cook Avenue  
Riverwoods, IL 60015

Dear John & Jane

Enclosed are your 20XX income tax return and 20XX estimated tax vouchers. The return should be signed and dated by both taxpayer and spouse.

Specific filing instructions are as follows.

FEDERAL INCOME TAX RETURN:

Mail your return on or before April XX, 20XX.

Internal Revenue Service Center  
P.O. Box 802501  
Cincinnati, OH 45280-2501

Enclose your check for \$5,392, payable to the United States Treasury. Include your social security number, daytime phone number and the words "20XX Form 1040" on your check.

Also enclose Form 1040-V. Do not attach Form 1040-V or your payment to your return or to each other. Please leave Form 1040-V and your payment loose in the envelope.

## Printing Returns

From the Application menu, you can select various return print options including:

- Print Entire Return
- Print Return Sections
- Print Selective Pages
- Previewing Print Items
- Print Organizer
- Printer Setup



[Setting Your Tax Print User Options](#)

### Print Entire Return

With CCH Access Tax you can preview wherever you can print. Previewing from this screen provides you the ability to present the statements behind the forms. Many users select the feature, “Print Statements behind forms” to see the detailed white paper statements in the preview navigation directly after the forms.

Print Entire Return: 20XX|EUO-TR:V1 - Smith, John - Tax

Select one or more copy types to print

**Print destinations and formatting options**

	No. of copies:	Print to:	Print device:	Watermark:	Mask:	Path and filename:
<input checked="" type="checkbox"/> Accountant	1	PDF	Adobe PDF	DRAFT	<input checked="" type="checkbox"/>	C:\Users\Paul.Hunkins\Desktop\Access <input type="button" value="Browse..."/>
<input type="checkbox"/> Government	1	PDF	Adobe PDF	COPY	<input type="checkbox"/>	C:\Users\Paul.Hunkins\Documents\WK <input type="button" value="Browse..."/>
<input type="checkbox"/> Client	1	PDF	Adobe PDF	No Watermark	<input type="checkbox"/>	C:\Documents and Settings\Paul Hunki <input type="button" value="Browse..."/>
<input type="checkbox"/> K-1	1	PDF	Adobe PDF	No Watermark	<input type="checkbox"/>	C:\Documents and Settings\Paul Hunki <input type="button" value="Browse..."/>

OR

Single file location:  
C:\Documents and Settings\Paul Hunki

Apply print set:  
Pauls Print Set

**Additional options**

- Print tickmark for accountant copy
- Print one statement per page
- Create separate PDF / TIFF files
- Print statements behind forms
- Create bookmark PDFs (large returns may take longer to process)
- Print only open diagnostics

**Print electronic filing PDF attachments**

Include the electronic filing PDF attachments to print for each selected copy type. For the government copy, the PDF attachments will only print when the full copy of the electronic return is selected to print.

- Accountant
- Government
- Client

**Password protect PDF(s)**

- Password protect PDF(s)
  - Accountant
  - Government
  - Client
  - K-1

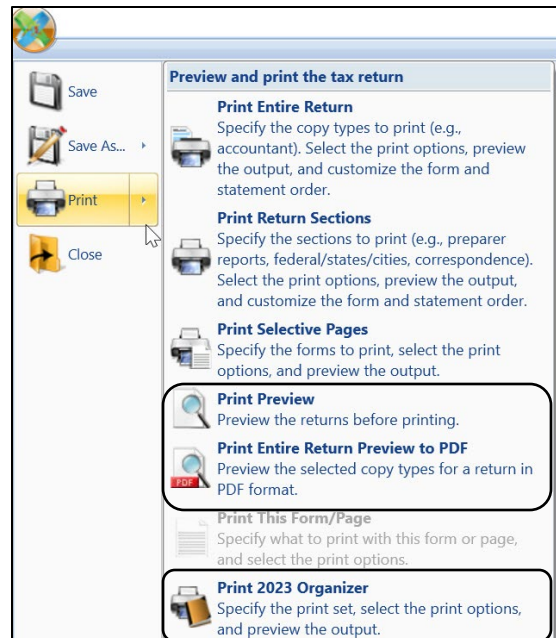
Password:  Confirm password:

## Previewing Print Items

You can preview print documents in the Print Preview window or in Adobe PDF format. Each preview method has its advantages.

When you select **Print Preview** from the Application menu, you have the option of selecting the return sections you want to preview. For example, you can select to preview the entire return or only a state return. The Print Preview window displays items such as return sections, forms, and statements on a page-by-page basis. A list of all the selected print items is displayed on the navigation panel. You can reorder items in the navigation panel within each copy type.

When you select **Print Entire Return Preview to PDF** on the Application menu, you are requesting a preview of the entire return for selected copy types. This method also gives you the flexibility to move between Adobe and Tax to review or work on a tax return while your preview remains open.



## Printing Organizers

Printing Organizers is accessible from a prior year Individual or Fiduciary return only and is available when the current year Organizer applications are released in November. Organizers can be reprinted as needed.

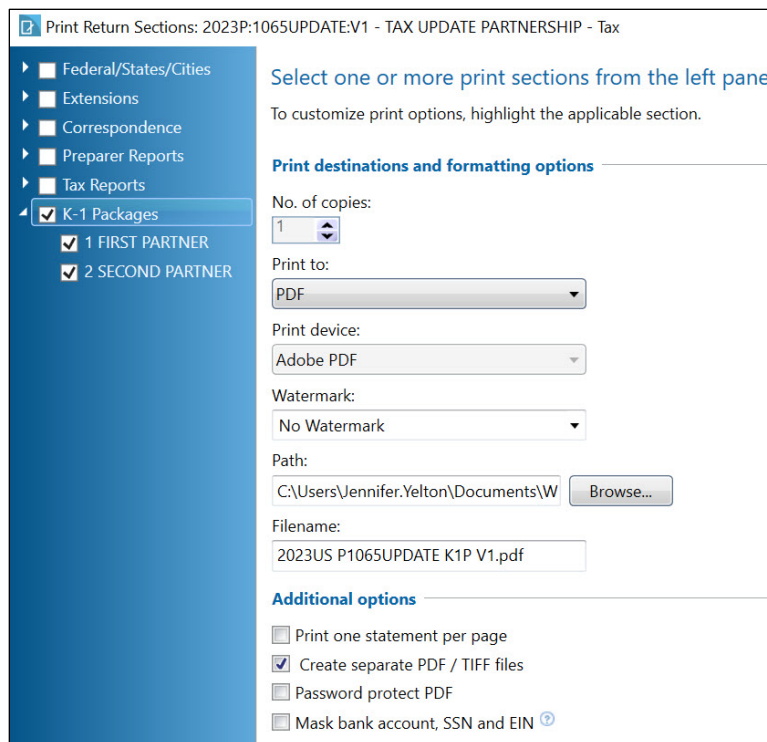


[Click Here for more information on printing Organizers](#)

## Print Return Sections

The navigation panel on the **Print Return Sections** window allows you to select specific sections relating to the open return. The following list of available print items will vary based on the tax product of the open return and the available sections in the open return.

- Federal, State, and City Copies
- Extensions
- Estimates
- Correspondence
- Preparer Reports
- Federal Elections Statements
- Tax Reports
- K-1 Packages



## Printer Setup

Printer Setup gives you the option of assigning individual printers for the following:

- Returns, forms, and reports
- Correspondence items (letters, filing instructions and statements)

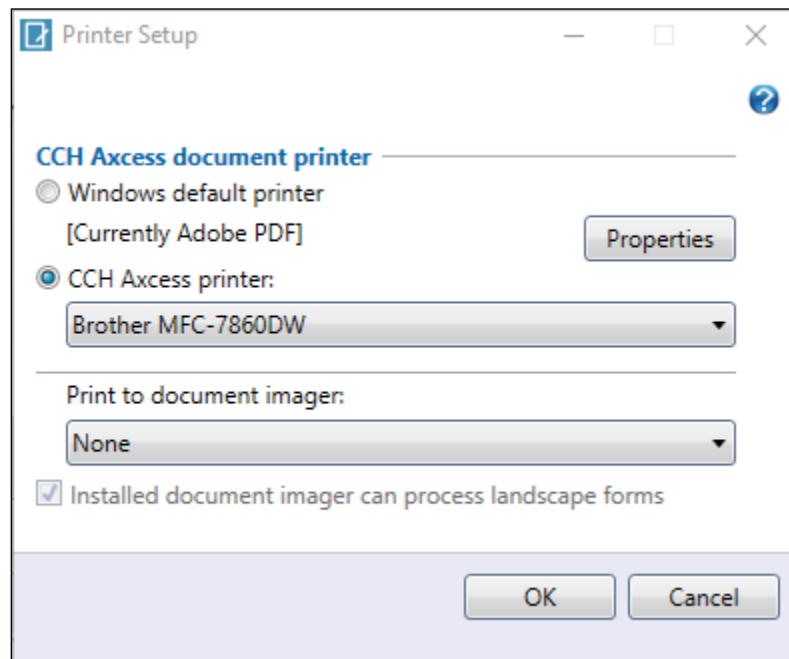
The printer settings apply to all CCH Access Tax applications and remain in effect for this workstation until you change the setup.



If the setup changes, the change applies to all open sessions of Tax.

### Steps to Setup Printer:

1. Select **Print - Printer Setup** on the Tax Application menu to display the Printer Setup window.
2. Choose the device to print returns, forms, and reports. You can select the Windows default printer or select a different installed printer from the printer list.
3. To print to an installed fax, select the device from the Print to fax list.
4. To print to a document imager, select the device from the Print to document imager list.
5. Select **Installed document imager can process landscape forms** if your document imaging software is capable of processing landscape forms. If not selected, landscape forms printed to the document imager are compressed and printed in portrait format.
6. Choose the default Windows printer or a specific printer to print correspondence, such as letters, filing instructions and statements.



Click **Properties** to edit printer properties, such as tray selection to print letterhead, for the selected Correspondence printer.

## Return Management Options

### Tax Return Versions

From the Application Menu, use **Save As > New Version** to create a new version of a return. You can have up to nine versions of a return.

Add a description to the version by selecting **Version Description** in the Activity group on the Manage ribbon. The Return Version feature is useful when you amend a return and want to preserve a copy of the return as originally filed. In this situation, we recommend as a best practice to save Version 1 as the Amended return and Version 2 as the originally filed return.

Dialog box titled "Edit Version Description" with the following content:

- Version #: 1
- Description:
- Buttons: OK, Cancel

### Return History

Use the **Return History** button on the Manage ribbon to view a return's history log. This log, recorded by session, contains a record of return activities such as calculation, print, etc. A session begins when you open the return and ends when you close the return.

Date	Status/Activity	User ID	Staff Name	Started	Finished	Duration
3/12/20XX	Session - ... Return Opened	984148		16:16	16:16	00:00
3/12/20XX	Session - ... Return Opened	984148		15:31	16:09	00:37
12/12/20XX	Session - ... Return Created from Pro Forma Return Opened	984148		15:02	15:02	00:00

Buttons: Print, Export, Close

## Update Status

The return status, if set using **Update Status**, also records by session with the most recent status displayed at the bottom of the window.

Update Project Internal Project

Client ID: 1040-Intro  
 Client name: Smith, John  
 Project ID: Internal Project  
 Project name: Internal Project

You can update the current return status.

Current return status:  
 No selection

Apply to all remaining projects

Update Status Cancel

## Securing Returns

Password protection is available if you select **Secure Return** on the Manage ribbon. The program requires a password to view, modify, or print data. Any staff member with access to Tax Preparation and who knows the password can access the secured return.

Secure Return

Enter a password to secure all returns for this client.

Password:

Confirm password:

Remove Password

OK Cancel

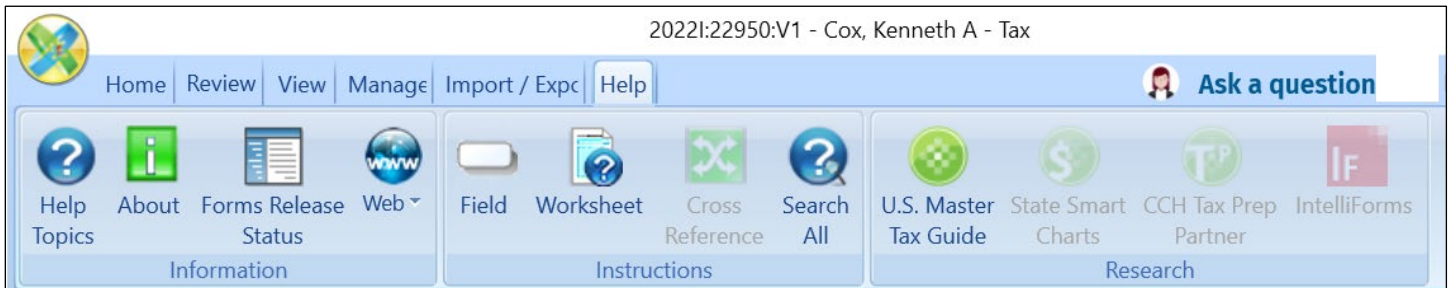


When printing a password-protected return to a PDF file, the same password does not protect the PDF file.

## Help

### Accessing Help

The program provides many different levels of help. You can access a list of the various help tools on the Help ribbon.



#### Help Topics

- Help Topics provide an index to almost every aspect of using the program. Topics include data entry, configuring the toolbar, keyboard commands, electronic filing, K-1 import/export, etc.

#### About

- Click the **About** button on the ribbon to display product version information about Tax.

#### Web

- Direct access to the various Wolters Kluwers Tax and Accounting web sites.

#### Field

- While on a data entry field, click the **Field** button on the ribbon for the instructions for that field. (F1 Function key)

#### Form

- The Government Form Instructions allows you to launch your web browser and link to the instructions for the current federal or state tax form.

#### Cross-Reference

- Use the Cross-Reference help to determine the worksheets and sections the program uses in the computation of a specific line on a Govt. form. On-screen cross-references are available for various states. (F1 Function key)

#### Worksheet

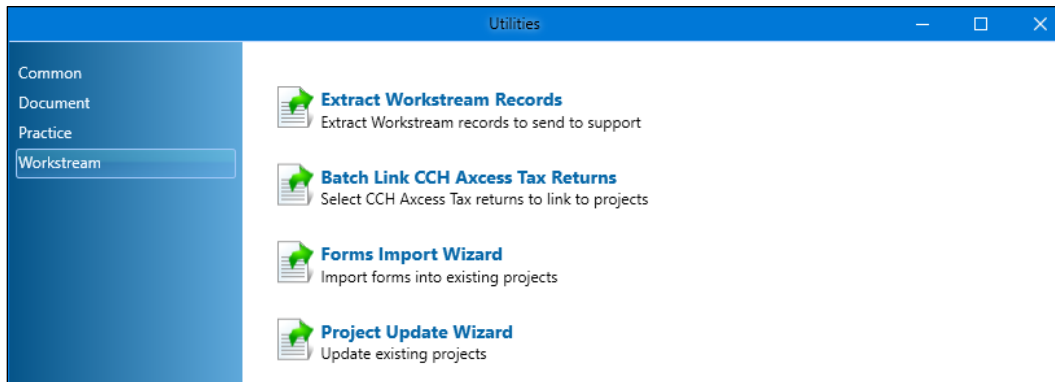
- From any worksheet, click the **Worksheet** button for general instructions for the worksheets. (F2 Function key)

## Appendix – Integration

### CCH Access™ Workstream

#### Batch Linking Projects and Returns

You can use the Batch Link utility to link returns to projects in large numbers. This eliminates the need to open each return and manually link it to a project. It also helps prevent the possibility of missing a project/return link.



You must have the firm-level batch link and tax return security rights to use this utility.

Run the Batch Link utility after hours when no one is working in CCH Access. If another user edits a project or return while the utility is running, the changes may be lost. The Batch Link utility may take an extended amount of time.



Select **Batch Link CCH Access Tax Returns** from Application Links > Firm > Utilities > Workstream to select filters to locate projects for linking and then click **Find Returns**. Use the filters in the window to link projects to returns by Return type.

When the summary window displays you can:

- **Review matched returns** - to view returns automatically matched to projects.
- **Refine project filters** - if not all filters were applied and there are unmatched returns.
- **Manually select projects** - if there are unmatched returns.

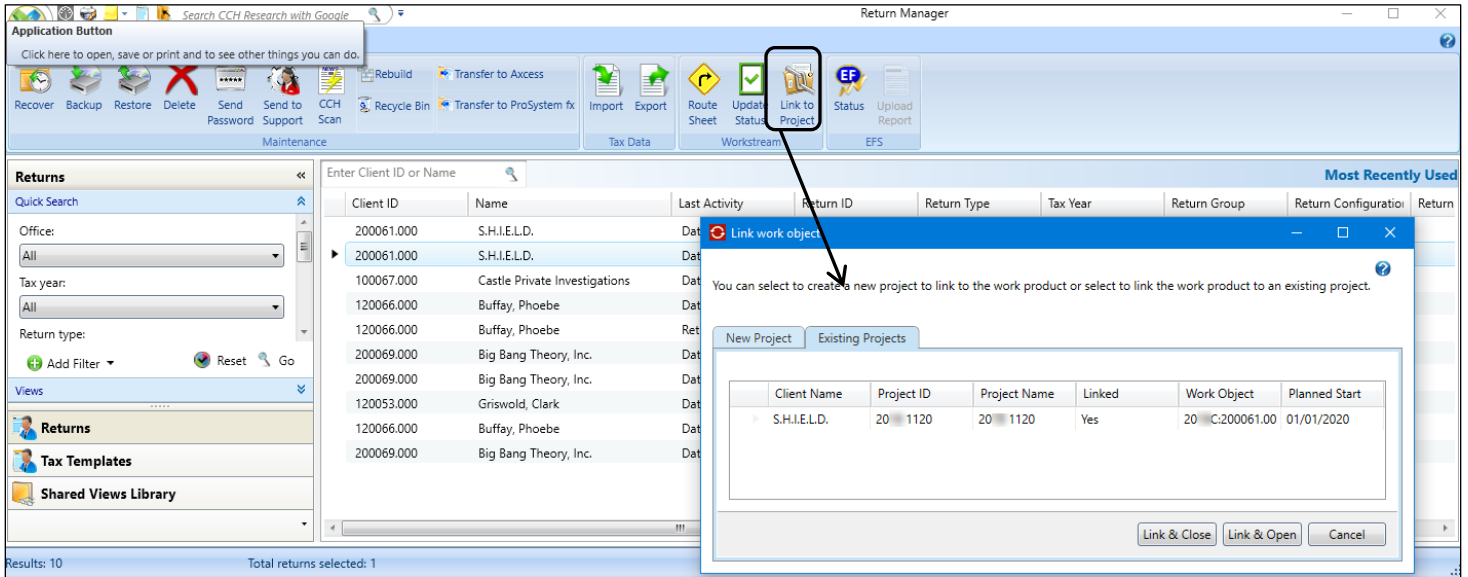
Click **Continue** to display the confirmation window, where you can print a report of returns not linked to projects. This report will indicate why any tax returns were not eligible to be linked, such as the client not having any open projects or that the return is already linked.

Click **Link** to complete the process and update each return with the matched project.

#### Linking Projects and Returns in Return Manager

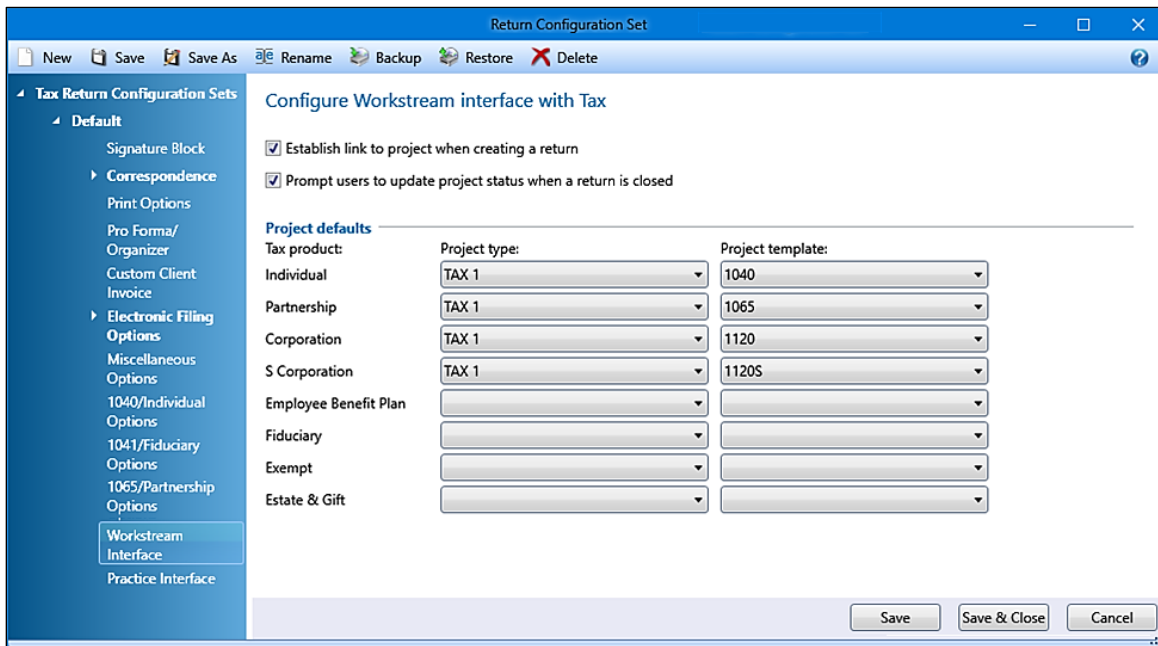
To link a tax return to a project in Return Manager, click **Link to Project** on the Utilities ribbon. Link to Project is also available inside the tax return on the **Manage** ribbon. A **Link work object** window appears.

On the **Link work object** window, link to a new project on the **New Project** tab, or select an existing project on the **Existing Projects** tab. Only existing projects for the same client are available to select.



### Configure Workstream Interface

Edit the Return Configuration Set on the Configuration page of the Dashboard to set a default type and template for project creation from Axxess Tax. You can also check the box to **Establish link to project when creating a return** and to **Prompt users to update project status when a return is closed**. The window to update the project status when closing the return allows the user to update the return status as well.



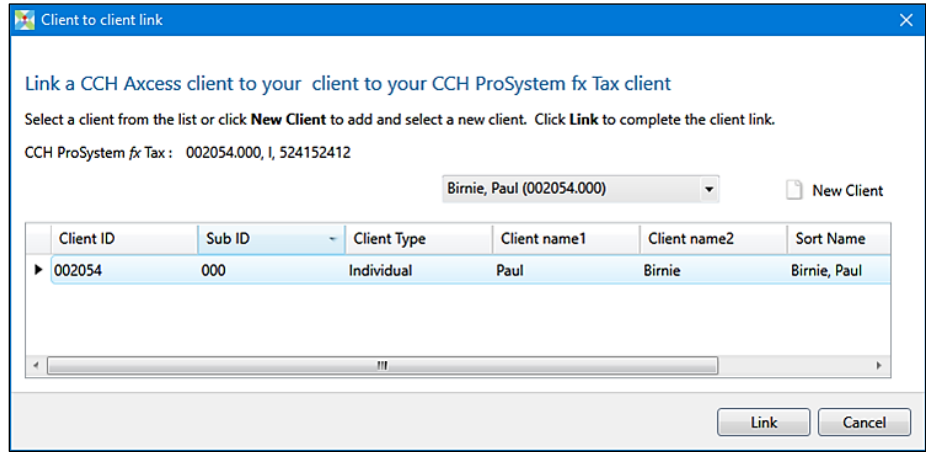
After linking to a project, access linked tax returns from My Assignments, Project Assignments, Notifications, the route sheet, and the open project window. CCH Axxess refers to linked returns as **Linked Work Objects**. In addition to accessing the work object, you can update the status of the work object on the route sheet without opening the return.

You can also access the Route Sheet and Update Status function from the Return Manager or within the tax return. If properly configured in the template or project, rolling the work object forward can trigger the project roll forward.



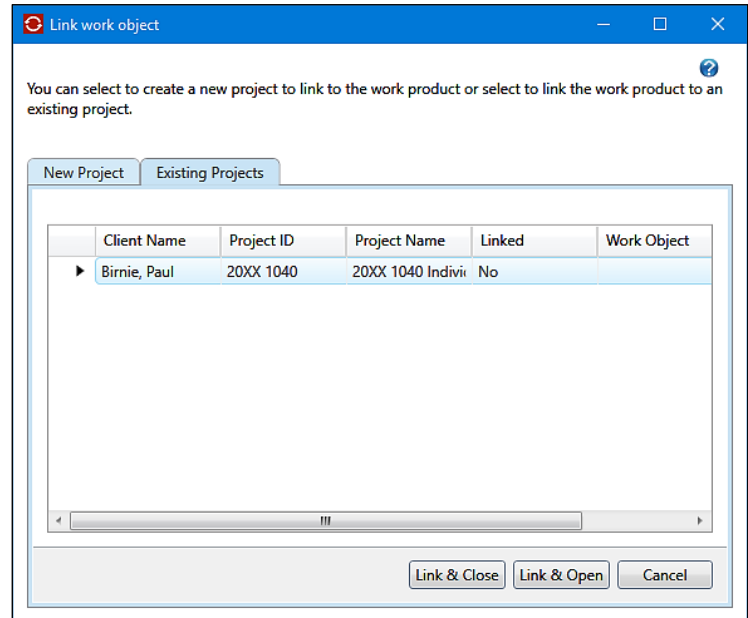
You can link multiple tax returns to a single project. In that case, using the **Open Linked Work Object** function on the Dashboard opens the **first** linked work object listed on the Route Sheet.

You can select the client from those listed, search for another client, or (depending on your security rights) create a **New Client**. Once you select a client, click **Link**. The **Link work object** window opens.



From here, users can create a new project for linking, or select an existing project. If creating a new project, choose the **Create method** and click **Create & Link**.


If you are selecting an existing project, only existing projects for the same client are available. Choose the project and click **Link & Open** to launch the project window or **Link & Close**.



## CCH Access™ Practice

You can send time clock transactions for each tax return to Practice Time Capture. You can automatically have clocks start when a return is opened and have the service code auto-populate by setting up return configurations using the Practice Clock Interface.

### Set Practice Clock Interface and Transaction Defaults

In the Dashboard **Application Links** menu, click **Configuration > Return configuration sets** under **Tax**. Click the  To expand a configuration set. Select Practice Interface from the navigation pane. On the **clocks** tab, check the box to enable the time clock for Practice.



This will override any decisions made in User Options regarding automatically starting a clock when opening a return.

For each return type, select the default service code for that return from the drop-down menu. You can use the default description automatically provided in the Description field or you can create your own. The description field will flow to the internal notes field for clocks and time transactions. Click save & close when done.

Return type:	Service code:	Description:
Individual	2000	<TAX YEAR> Individual Tax Return
Partnership	2120	<TAX YEAR> Partnership Tax Return
Corporation	2040	<TAX YEAR> Corporation Tax Return
S Corporation	2095	<TAX YEAR> S Corporation Tax Return
Fiduciary	2185	<TAX YEAR> Fiduciary Tax Return
Employee Benefit Plan	2160	<TAX YEAR> Employee Benefit Plan Tax Return
Exempt	2305	<TAX YEAR> Exempt Organization Tax Return
Estate and Gift	2265	<TAX YEAR> Estate and Gift Tax Return

### Set Practice Invoice Interface and Options

You can send tax return invoice details as a progress bill to Practice Billing and Invoicing. Click on the **Invoice Amount** tab. Select the box to **Enable sending invoice amounts to Practice**.

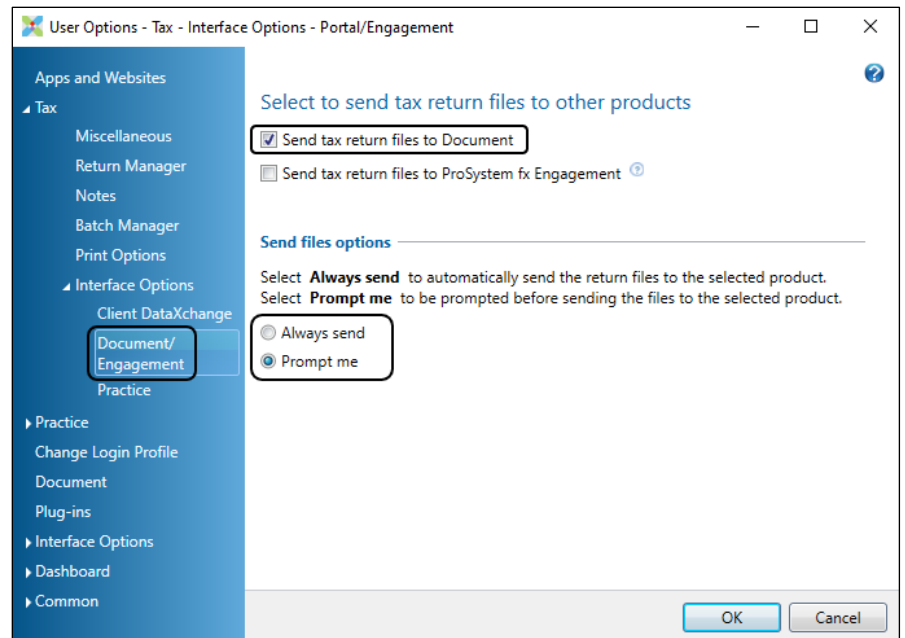
You can use the default descriptions provided or create your own. Using the default would generate the current year's tax return as the description. Once finished, click **Save & Close**.

Return type:	Description:
Individual	<TAX YEAR> Individual Tax Return
Partnership	<TAX YEAR> Partnership Tax Return
Corporation	<TAX YEAR> Corporation Tax Return
S Corporation	<TAX YEAR> S Corporation Tax Return
Fiduciary	<TAX YEAR> Fiduciary Tax Return
Employee Benefit Plan	<TAX YEAR> Employee Benefit Plan Tax Return
Exempt	<TAX YEAR> Exempt Organization Tax Return
Estate and Gift	<TAX YEAR> Estate and Gift Tax Return

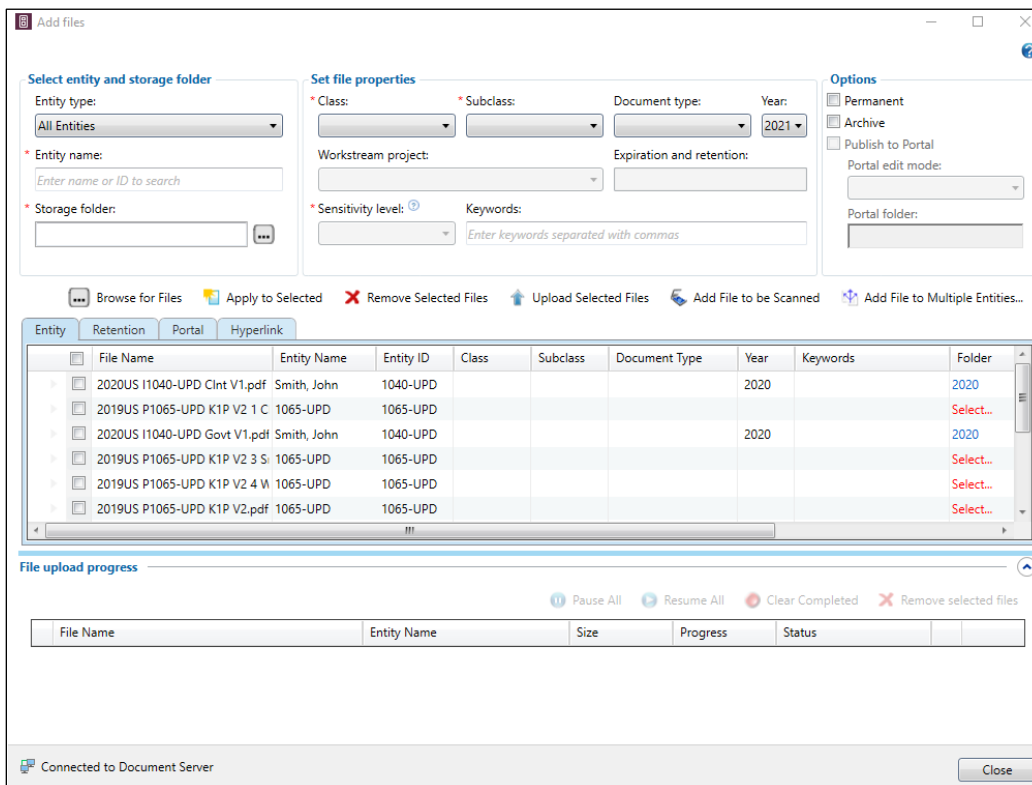
## CCH Access™ Document

On CCH Access Dashboard > User Options > Tax > Interface Options > Document/Engagement option, users can select to **Send tax return files to Document**.

Select **Always send** to always send the PDF copies of tax return to Document automatically. Select **Prompt me** to be prompted before sending the PDF copies of a tax return to Document during the print process.



The Add Files window will appear when Always send is active or if you select Yes after being prompted.

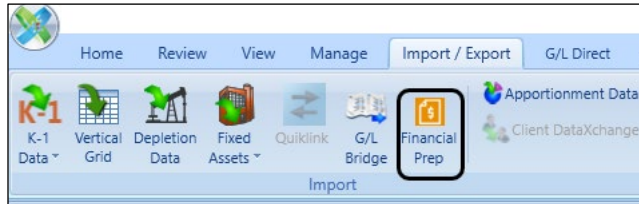


See this [KB article](#) for steps to configure Tax Mapping in the CCH Access Document.

## CCH Access™ Financial Prep

Click Financial Prep on the Import/Export tab of a linked return.

-💡- Instructions on linking an Engagement to a CCH Access return can be found in this [KB article](#).



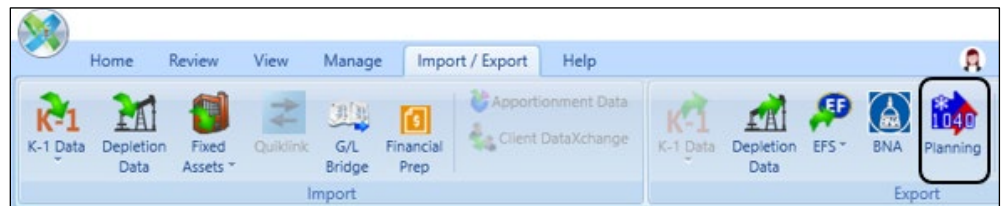
## CCH ProSystem fx Fixed Assets

Click Fixed Assets on the Import/Export tab of any return. The default file path is C:\FixedAst\UserData. Use the **Browse** button if the Fixed Assets data is located on a network drive. Select the fixed asset file then click Next to choose the import of totals only or all asset details.

## CCH ProSystem fx Planning

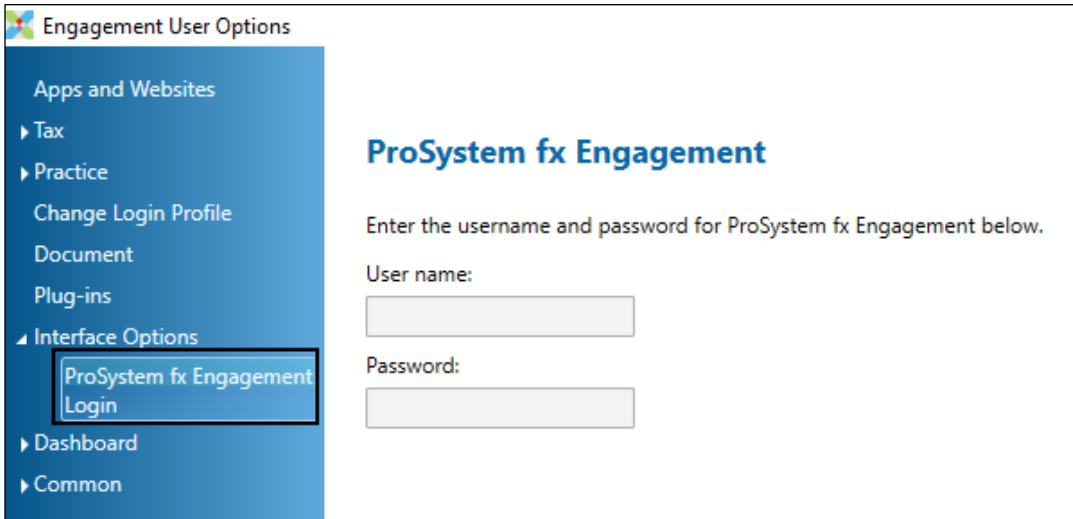
Export to ProSystem fx Planning is available for 1040 returns. Click Planning on the Import/Export tab of the Access ribbon.

Click **Launch Planning** after the export is successfully completed to view the exported data.



## CCH® ProSystem fx® Engagement

CCH Access Tax users can save their ProSystem fx Engagement username and password under Dashboard > User Options > Interface Options.



Click G/L Bridge on the Import/Export ribbon to begin the process of importing the trial balance into a CCH Access Tax return. On the G/L Bridge window, two options are available. Quiklink will be available when using the option **Select client for import**.

