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When you have to be right

Tax & Accounting

CCH Axcess™ Tax

Quick Reference Card

Online Resources: Support.CCH.com/Axcess

- Chat with support at **Support.CCH.com/Chat**
- Submit a support case at **Support.CCH.com/Ticket**
- Search our Knowledge Base at **Support.CCH.com/KB**
- Customer Service/Technical Support: **800-739-9998**

My Account Number:

Glossary of Terms

Application Menu
The menu located in the upper-left corner of the window that contains the actions available for the current view, such as Print, access to user options and a list of recently accessed records.

Common Data
Data fields used in two or more applications, such as Social Security Number, Client ID or Name fields, that are shared between products.

Entity
A discrete taxable unit permitted by law to own property and engage in financial affairs, such as a rental property, farm or business with its own income and expenses. Entity income and expenses are usually entered in a series of forms, such as Schedules C, E, F, O and K-1.

KeyTips
The access keys that display over each feature on the ribbon and Quick Access Toolbar by pressing the Alt key.

Organizational Unit
Organizational units define your organizational structure. The structure can consist of multiple levels: firm, region, office and business unit. If regions are used, at least one office must exist in each region. At least one business unit must exist in each office.

Print Set
A set of preferences that determines how documents print for each tax product, tax authority and copy type. Custom print sets are configured for the firm.

Quick Access Toolbar (QAT)
The toolbar displayed above or below the ribbon, depending on your preference, that includes a link to Dashboard and other frequently used controls.

Quick Search
A pane on the Return Manager navigation panel that defines the returns that display in the grid based on selected filter values. Quick Search results can be saved as a new view.

Rebuild
A Return Manager utility that rebuilds a new version of an existing return. This utility does not rebuild tax return annotations or changes made to letters in the return.

Recover
A Return Manager utility that recovers the version of an historical return copy.

Restore
A Return Manager utility that restores the version of a backed up return copy.

Return Configuration Set
A set of preferences that allows the firm to configure tax return details for signature block, print, electronic filing, tax products and CCH Axcess™ product interfaces with the Tax system.

Return Group
Setup at the firm level for filtering and organizing purposes. Clients are assigned to return groups in the client profile. Returns for a specific client belong to the same return group. A return group also refers to a family of consolidated returns.

Reversed Tick Mark
A visual cue inserted in a field by the system to indicate a calculation that caused the data in a previously tick marked field to change.

Ribbon
A component of the application that organizes commands into a set of tabs that replace traditional menus and toolbars. These tabs simplify accessing application features as they organize commands to correspond to related tasks.

Signer
Staff who have the assigned Staff Profile rights to sign in the Paid Preparer portion of the tax return.

Signer Location
Firms with multiple offices can define signer information by location to use instead of the signature block information. Locations are defined in Tax Lists, assigned in staff profiles, and enabled in return configuration sets.

Sub-ID
A sub-ID may be included as a part of the client ID. For a large corporation as a client, each subsidiary could have a client sub-ID. If an entire family has the same client ID, each family member could have a sub-ID.

Template
A tax return used as a template to set preparation options, such as print detail and preparer information, for a tax product.

Tick Mark
A visual cue inserted in a field to indicate it has been reviewed.

View
A set of preferences that defines filters, columns and sorting information to determine the records and associated data that are shown in the Return Manager grid.

Application Menu — User Options

Miscellaneous

- **Enable AutoText Descriptions** — Creates return and firm-level descriptions for fields that allow multiple entries.
- **K-1 Export** — Creates K-1 export files each time a business return is calculated.
- **Calc Complete Message** — Displays a notification message after returns are calculated.
- **Calculated Data** — Displays calculated data and data from other sources in blue.
- **Forms List** — Sets the worksheet display option when opening returns.
- **Application Menu** — Sets the number of recently accessed returns to display.
- **Electronic Filing Upload Notification** — Sets the method for receiving desktop notifications.

Return Manager

- **Return List Options** — Sets the default view for return grid views in Return Manager.
- **Template List Options** — Sets the default view for template grid views in Return Manager.

Notes

- **Default Note Types** — Sets a default note type for each note level.
- **Open Notes Pane** — Displays the Tax Notes Pane each time you open a return.

Batch Manager

- **Export Path** — Sets the default path for all job detail reports.

Print Options

- **Entire Return/Other Print Items** — Sets your print defaults, such as the number of copies and the print device, when printing the entire return and other print items.

Client DataXchange

- **Export File** — Creates a Client DataXchange export file each time an Estate return is saved.

CCH Axcess™ Document, CCH Axcess™ Portal and CCH® ProSystem *fx*® Engagement

- **Send Tax Return Files** — Sends return files to CCH Axcess Document and CCH Axcess Portal, and CCH ProSystem *fx* Engagement from Tax, depending on your licensed products.

Return Manager Toolbar

File

- New
- Open
- Delete
- Close Return Manager
- Recent Returns

Utilities

MAINTENANCE

- Recover
- Backup
- Restore
- Rebuild
- Send Password
- Send to Support
- Scan Returns
- Transfer to Axcess
- Transfer to ProSystem fx

TAX DATA

- Import
- Export

WORKSTREAM

- Route Sheet
- Update Status
- Link to Project

PRINT

- Print Blank Organizer Forms

View

- Customize Toolbar
- Edit Columns
- Change Current View
- Update Current View
- Save As New Year
- Zoom
- Refresh Grid
- Export Grid

Help

HELP & SUPPORT

- Help Topics
- Resource Center
- Form's Status
- About
- Feedback Forum
- Virtual Support Assistant
- Web

RESEARCH

- CCH AnswerConnect

Manage

- Roll Forward
- Update
- Return History
- Unlock
- Prohibit Changes
- Clear Prohibit Changes

E-File

- EF Status
- EF Upload Report

Tax Return Ribbon

Home

- Calc
- Print
- Previous Worksheet/ Form
- Next Worksheet/Form
- Previous Sheet
- Next Sheet
- Forms List
- WS Form
- Gov to WS Link
- Return to Link List
- Return to Government
- Home State Forms
- Expand All
- Collapse All
- New Entity
- Drill Down
- Expand Form
- Go Back
- Change Attachment
- Delete
- Cut
- Copy
- Paste
- List
- Override
- Estimate
- Lookup Value
- Return Notes
- Field Note
- Navigate Back
- Navigation History
- Navigate Forward

Review

- Diagnostics
- Input Overrides
- Estimates
- Reversed Tick Marks
- Overrides
- Summary
- EFS Status
- Export to EFS
- View Attachment
- Letters
- Notes Pane
- Statements
- Federal Elections
- View Tick Marks
- Insert Tick Marks
- Delete Tick Marks
- Delete All Overrides
- Delete All Estimates

View

- Forms in Return
- Forms List
- WS Form
- Form Tabs
- Status Bar
- Zoom To (100%)
- Zoom In
- Zoom Out
- New Tab
- New Window
- Reset Tab

Manage

- Split Return
- Version Description
- Tax Equalization
- Define Keywords
- AutoText
- Return History
- Secure Return
- Prohibit Changes
- Route Sheet
- Update Status
- Link to Project
- Send Invoice

Import

- K-1 Data
- Vertical Grid Import
- Depletion Data
- Fixed Assets
- Quiklink
- G/L Bridge
- Engagement
- Apportionment Data
- Client DataXchange

Export

- K-1 Data
- Vertical Grid Export
- Depletion Data
- EFS
- BNA
- Planning
- Apportionment Data
- Client DataXchange
- Field Tag

Help

- Help Topics
- About
- Forms Release Status
- Web
- Field
- Form/Worksheet
- Cross Reference
- Search All
- U.S. Master Tax Guide®
- CCH® SmartCharts
- CCH® Tax Prep Partner
- CCH® IntelliForms®

Locating Features

	CCH® ProSystem *fx*® Tax	CCH Axcess Tax
Return Input		
Create New	Tax Preparation > File > New Return	Return Manager > **File** > New > New Return
Create Default	Tax Preparation > Options > Default Returns	Return Manager > **File** > New > New Template
Save	Tax Preparation > File > Save	Tax Return > Application Button > Save
Calculate	Tax Preparation > Calc > Return	Tax Return > Home Tab > Process Group > Calc > Return
Delete	Office Manager > Delete Client Data	Return Manager > **File** > Delete
Split Joint Returns	Tax Preparation > File > Split Joint Return	Tax Return > Manage Tab > Activity Group > Split Return
Utilities		
Backup	Office Manager > Backup Client Data	Return Manager > Utilities Tab > Backup
Restore	Office Manager > Restore Client Data	Return Manager > Utilities Tab > Restore
Print		
Print Entire	Tax Preparation > File > Print > Print Entire Return	Tax Return > Application Button > Print > Print Entire Return
Quick Print	Feature Not Available	Tax Return > Application Button > Print > Quick Print
Configure Return Print Set	Feature Not Available	Dashboard > Application Links > Tax > Configuration > Return Print Sets
Notes and Lists		
Insert Notes	Tax Preparation > Edit > Notes	Tax Return > Home Tab > Insert Group > Field Note
Insert Global Notes	Tax Preparation > Edit > Global Note	Tax Return > Home Tab > Insert Group > Return Notes
Insert Lists	Tax Preparation > Edit > List	Tax Return > Home Tab > Insert Group > List
Options		
Set User Preferences	Tax Preparation > Options > Preferences	Return Manager > Application Button > User Options
Configure Office Groups	Office Manager > Configure Office Groups	Dashboard > Application Links > Tax > Configuration > Return Configuration Sets
Set Firm Defaults PRINT	Feature Not Available	Dashboard > Application Links > Firm > Settings and Defaults > Tax

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Product Support
Support.CCH.com

Technical Support
800-739-9998

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