

ATX™ Learning Portal

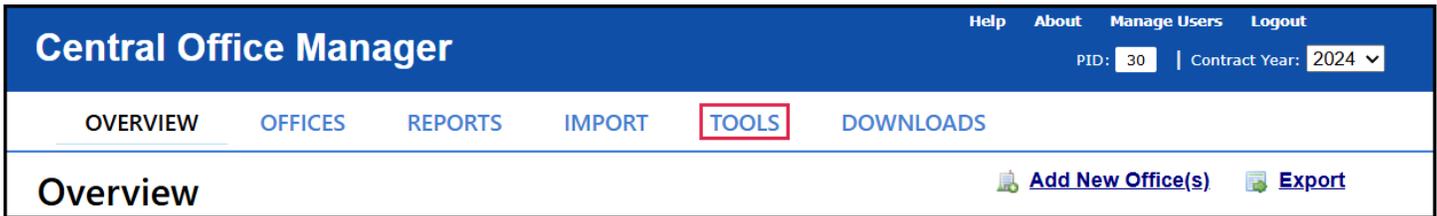
Rolling Over Sub-Offices

To roll over an Add Office or Add EFIN from one year to another.

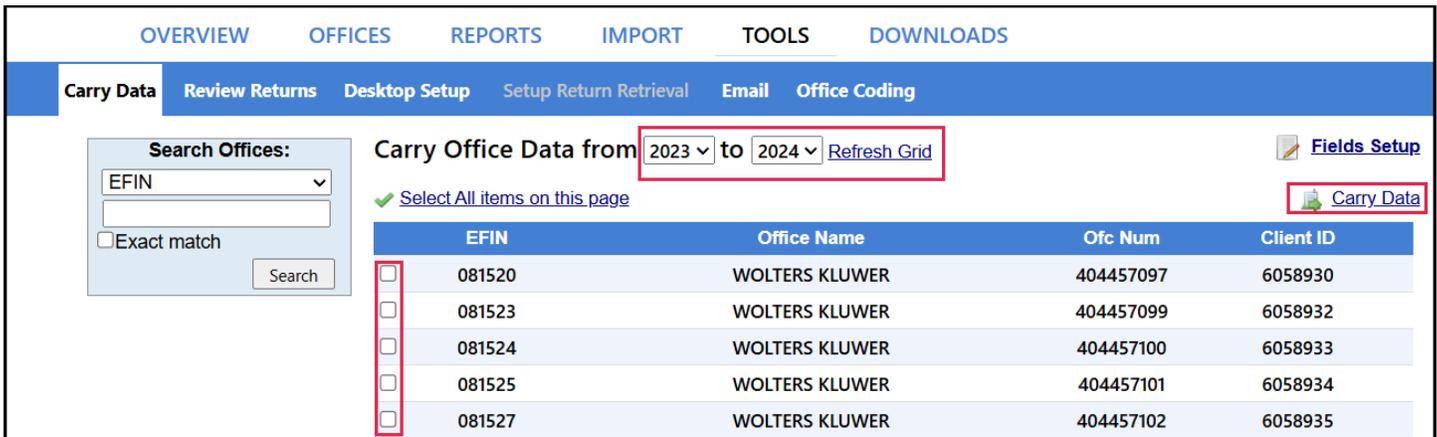
1. Navigate to <https://com.cchsfs.com>.
2. Log in using your Client ID, the username *Admin*, and your password.
3. Select the **I'm not a robot** check box, complete any additional reCaptcha prompts, and click **Login**.

Your login credentials use the same password you use for the Customer Solution Center.

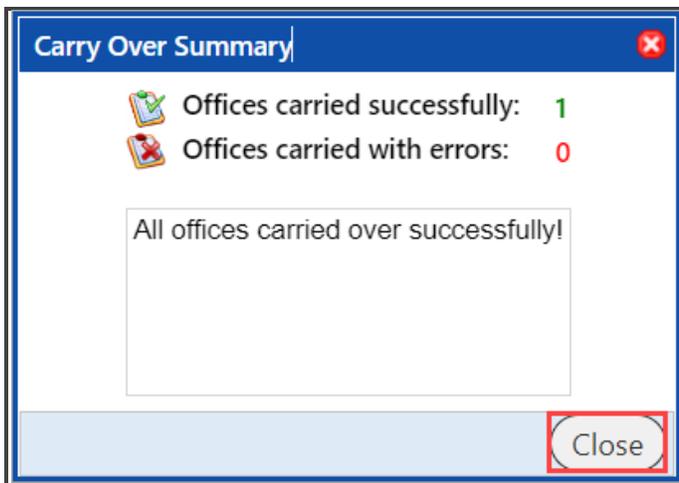
4. Central Office Manager displays the Overview page. Click the **Tools** tab.



5. From the Carry Data tab, click the drop-down menus to select the year you are carrying this office from and to.
6. Click **Refresh Grid**.
7. Select the checkbox of the office or offices you want to carry forward. Once the office(s) have been selected, click **Carry Data**.



8. Central Office Manager displays the Carry Over Summary dialog box, reflecting the status of the Carry Forward. Click **Close**.



The Add Office or Add EFIN rolled over will be setup using prior year information.

Central Office Manager Help About Manage Users Logout
PID: | Contract Year:

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Offices

[Add New Office\(s\)](#) [Export](#)

Find Exact Match Advanced Search

EFIN	Office Name	Ofc Num	Contact Firstname	Contact Lastname	Status	Client ID	Reg Code	Act Code	Tax Product
527554	PPR.TESTACCOUNT	0	SFSQA	QUALITY-ASSURANCE	Active	1024	DD1D-DDF2-RDEB-MIDM-CDAD		TWD, TWO
089825	LOIS	1	LOIS	BLACKMORE	Active	194498			
089869	LUIS	3	LUIS	GALVIS	Pending	919233			
089826	ALMA	5	ALMA	RUBIO-VALLE	Active	731091	UQSR-DDDD-RDEB-MIDD-ILNY		TWD