

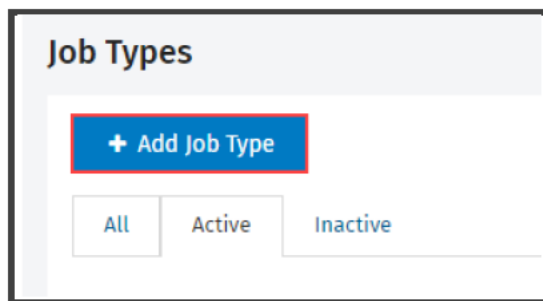
CCH iFirm Learning Portal

Set up Job Types

You can use job types as templates to define jobs you will perform. CCH iFirm Practice Manager defaults some monthly or annual accounting jobs, tax preparation, audit, payroll and other job types. Use job types to help you classify jobs so you can easily search for and report on them.

To add a job type:

- i** From the **Admin Home** page, click **Job Types** to display the Job Types page. Click **Add Job Type**.



- i** CCH iFirm displays the Add Job Type page, which consists of four tabs: **Details**, **Invoicing**, **Statuses** and **Tax Returns**.
- i** On the **Details** tab, enter a name in the Job Type box and a short code. Select the **Period End Required** checkbox if you want a period end date to be specified with this job type.
- i** Select a timeframe from the **Create Another Job** drop-down list to determine if this job type will be set to generate the next job automatically. Select the **Time can be added** drop-down list to set who will be able to log time for this job type.
- i** Select the turnaround time, in days, for the job type by selecting the initial status, end status and expected turnaround time in days. Type the job details, if needed. Click **Save** and then click the **Invoicing Tab**.

Add Job Type

Details Invoicing Statuses Tax Returns

Job Type

Job Type

Short Code

Period End Required ☐

Automatic Job Creation

Create Another Job [Tell me more](#)

WIP Settings

Time can be added by

Turnaround Time

Start Status

End Status

Expected Turnaround days

Job Details

Job Details

i CCH iFirm displays the Invoicing tab. Provide invoice text to use when processing billing for this job type. Select **Yes** if you will use the interim text for invoicing.

Add Job Type

Details Invoicing Statuses Tax Returns

Invoicing

Invoice Text

Use Interim Text

i For additional information about interim text and invoicing, click [here](#).

- i** Click the **Statuses** tab. Select the statuses that will be part of this job type and click **Save** to save any changes made.

The screenshot shows the 'Add Job Type' form with the 'Statuses' tab selected. The 'Job Statuses' section is visible, and a red box highlights the 'Assigned Statuses' list. The list contains the following items with their selection status:

- ☒ Not Yet In
- ☒ Pending
- ☐ Allocated
- ☐ Active
- ☒ Ready To Review
- ☒ Reviewed
- ☐ Complete
- ☒ Filed

At the bottom, there is a green 'Save' button with a dropdown arrow and a grey 'Cancel' button.

- i** Click the **Tax Returns** tab if CCH iFirm is integrated with ATX. Here you must assign the tax return types to the job type. Remember to click **Save**, to save any changes made.

The screenshot shows the 'Add Job Type' form with the 'Tax Returns' tab selected. The 'Tax Return Types' section is visible, and a red box highlights the 'Assigned Return Types' list. The list contains the following items with their selection status:

- ☐ 1120 ☐ 1120-C ☐ 1120-F
- ☐ 1120-FSC ☐ 1120-H
- ☐ 1120-PC ☐ 1120-IC-DISC
- ☐ 1120-L ☐ 1120-ND ☐ 1120-POL
- ☐ 1120-REIT ☐ 1120-RIC
- ☐ 1120-SF ☐ 1120S
- ☐ 706 ☐ 1040 ☐ 1040A
- ☐ 1040EZ ☐ 1040NR
- ☐ 1040NR-EZ ☐ 990 ☐ 990EZ
- ☐ 990PF ☐ 1065 ☐ 1065B
- ☐ 8865 ☐ 1041 ☐ 1041-

Below the list, there are two dropdown menus:

- Set Job Status to:
- Set Target End Date:

At the bottom, there is a green 'Save' button with a dropdown arrow and a grey 'Cancel' button.

- i** For additional information on assigning the return types, review the help article on this topic.