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## Tax & Accounting

# CCH Axcess™ Tax Quick Reference Card

Online Resources: [Support.CCH.com/Axcess](https://support.cch.com/Axcess)

- Chat with support at [Support.CCH.com/Chat](https://support.cch.com/Chat)
- Submit a support case at [Support.CCH.com/Ticket](https://support.cch.com/Ticket)
- Search the Knowledge Base at [Support.CCH.com/KB](https://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.

## **Private View**

A view listed under My Views that is visible and available only to the creator of the view.

## **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 Axxess™ 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.

## **Shared View**

A view that is added and stored in the Shared Views Library that can be imported in the My Views folder as a linked shared view or as a private view. Linked shared views reflect updates made by users with rights to edit shared views in the Shared Views Library.

## **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.

# Keyboard Shortcuts

Show/hide application KeyTips.	Alt
Add another item to a grid or detail worksheet.	Alt +
Display the active government form's supporting statements.	Ctrl D
Open the Find window.	Ctrl F
Display the list in an amount or grid field.	Ctrl L
Open Dashboard.	Ctrl M
Open a worksheet or form in a new tab.	Ctrl Click
Paste Special in worksheet grids.	Ctrl Alt V
Create a new return.	Ctrl N
Open the selected return in the Return Manager grid.	Ctrl O
Recalculate the return.	Ctrl R
Save changes to the return.	Ctrl S

Insert or delete a tick mark in the selected field.	Ctrl T
Move to the end of the line or list.	End
Move the cursor to the next field.	Enter
Display help for a field or window.	F1
Display help for a worksheet.	F2
Display government form instructions.	F3
Look up a value for the selected field.	F4
Refresh the Return Manager grid.	F5
Move between panes.	F6
Move to the next worksheet or form.	F9
Move to the previous worksheet or form.	F10
Move to the beginning of the line or list.	Home

## 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 Access™ Document, CCH Access™ Portal and CCH® ProSystem fx® Engagement

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

# Return Manager Ribbon

Home	Utilities	Views	Views
New 	Recover 	New 	Help Topics 
Open 	Backup 	Save View As 	About 
Update 	Restore 	Paste 	Web 
Roll Forward 	Delete 	Cut 	CCH® Research 
Return History 	Send Password 	Copy 	CCH® IntelliForms® 
Prohibit Changes 	Send to Support 	Delete 	
Unlock 	CCH Scan 	Rename 	
Export Grid 	Rebuild 	Define View 	
Find 	Recycle Bin 	Change Owner 	
Save View As 	Transfer to CCH Axxess 	Import View 	
Refresh 	Transfer to CCH ProSystem fx 	Export View 	
Select All 	Import Tax Data 	Add Shared View 	
Select Columns 	Export Tax Data 		
	Route Sheet 		
	Update Status 		
	Link to Project 		
	EFS Status 		
	Upload Report 		

# Tax Return Ribbon

Home	Review	Manage	Export
Calc 	Diagnostics 	Split Return 	K-1 Data 
Print 	Input Overrides 	Version Description 	Vertical Grid Export 
Previous Worksheet/ Form 	Estimates 	Tax Equalization 	Depletion Data 
Next Worksheet/Form 	Reversed Tick Marks 	Define Keywords 	EFS 
Previous Sheet 	Overrides 	AutoText 	BNA 
Next Sheet 	Summary 	Return History 	Planning 
Forms List 	EFS Status 	Secure Return 	Apportionment Data 
WS Form 	Export to EFS 	Prohibit Changes 	Client DataXchange 
Gov to WS Link 	View Attachment 	Route Sheet 	Field Tag 
Return to Link List 	Letters 	Update Status 	
Return to Government 	Notes Pane 	Link to Project 	
Home State Forms 	Statements 	Send Invoice 	
Expand All 	Federal Elections 		
Collapse All 	View Tick Marks 	<b>Import</b>	
New Entity 	Insert Tick Marks 	K-1 Data 	Help Topics 
Drill Down 	Delete Tick Marks 	Vertical Grid Import 	About 
Expand Form 	Delete All Overrides 	Depletion Data 	Forms Release Status 
Go Back 	Delete All Estimates 	Fixed Assets 	Web 
Change Attachment 		Quiklink 	Field 
Delete 	<b>View</b>	G/L Bridge 	Form/Worksheet 
Cut 	Forms in Return 	Financial Prep 	Cross Reference 
Copy 	Forms List 	Engagement 	Search All 
Paste 	WS Form 	Apportionment Data 	U.S. Master Tax Guide® 
List 	Form Tabs 	Client DataXchange 	CCH® SmartCharts 
Override 	Status Bar 		CCH® Tax Prep Partner 
Estimate 	Zoom To 		CCH® IntelliForms® 
Lookup Value 	Zoom In 		
Return Notes 	Zoom Out 		
Field Note 	New Tab 		
Navigate Back 	New Window 		
Navigation History 	Reset Tab 		
Navigate Forward 			

# Locating Features

## CCH® ProSystem fx® Tax

## CCH Access Tax

### Return Input

<b>Create New</b>	Tax Preparation > File > New Return	Return Manager > Application Button > New > Tax Return
<b>Create Default</b>	Tax Preparation > Options > Default Returns	Return Manager > Application Button > New > Tax Template
<b>Save</b>	Tax Preparation > File > Save	Tax Return > Application Button > Save
<b>Calculate</b>	Tax Preparation > Calc > Return	Tax Return > Home Tab > Process Group > Calc > Return
<b>Delete</b>	Office Manager > Delete Client Data	Return Manager > Application Button > Delete
<b>Split Joint Returns</b>	Tax Preparation > File > Split Joint Return	Tax Return > Manage Tab > Activity Group > Split Return

### Utilities

<b>Backup</b>	Office Manager > Backup Client Data	Return Manager > Utilities Tab > Backup
<b>Restore</b>	Office Manager > Restore Client Data	Return Manager > Utilities Tab > Restore

### Print

<b>Print Entire</b>	Tax Preparation > File > Print > Print Entire Return	Tax Return > Application Button > Print > Print Entire Return
<b>Quick Print</b>	Feature Not Available	Tax Return > Application Button > Print > Quick Print
<b>Configure Return Print Set</b>	Feature Not Available	Dashboard > Application Links > Tax > Configuration > Return Print Sets

### Notes and Lists

<b>Insert Notes</b>	Tax Preparation > Edit > Notes	Tax Return > Home Tab > Insert Group > Field Note
<b>Insert Global Notes</b>	Tax Preparation > Edit > Global Note	Tax Return > Home Tab > Insert Group > Return Notes
<b>Insert Lists</b>	Tax Preparation > Edit > List	Tax Return > Home Tab > Insert Group > List

### Options

<b>Set User Preferences</b>	Tax Preparation > Options > Preferences	Return Manager > Application Button > User Options
<b>Configure Office Groups</b>	Office Manager > Configure Office Groups	Dashboard > Application Links > Tax > Configuration > Return Configuration Sets
<b>Set Firm Defaults</b>	Feature Not Available	Dashboard > Application Links > Firm > Settings and Defaults > Tax