

## Central Office Manager (COM)

Customers who purchase TaxWise for multiple offices use Central Office Manager to set up additional offices and apply for Refund Settlement Solutions. Central Office Manager provides a cloud-based solution for managing offices from any location with an internet connection.

To access Central Office Manager:

1. Navigate to <https://com.cchsfs.com>.
2. Log in using your Client ID, the username *Admin*, and your password.

**Client Login** Wolters Kluwer

**CLICK HERE**  
for Details on 2-Step Verification  
(Multi-Factor Authentication)


You are not authorized to use Centralized Office Management.

**Client Login**  
Please login to your account by completing the form below

Client ID

Username

Password


User Verification ( [what's this?](#) )  
 I'm not a robot  reCAPTCHA  
[Privacy](#) [Terms](#)

**WARNING:** Three unsuccessful login attempts will lock your account  
[First time signing in?](#)  
[Forgot username or password?](#)

**Password Requirements**

- Must be at least 8 characters in length
- Must not exceed 100 characters
- Must contain at least one number
- Must contain at least one special character(#?!@\$\$%^&\*~)
- Must contain at least one upper case character
- Must contain at least one lower case character
- Case-sensitive
- Cannot contain the user name
- Cannot reuse any of your last 10 passwords
- Passwords expire every 90 days

*User names and passwords used on this site are different from user names and passwords used in the desktop tax application. Each must be maintained independently.*

-  Your login credentials use the same password you use for TaxWise Online and the Customer Solution Center.

3. Select the **I'm not a robot** check box, complete any additional reCaptcha prompts, and click **Login**.
4. Central Office Manager displays the Overview page.

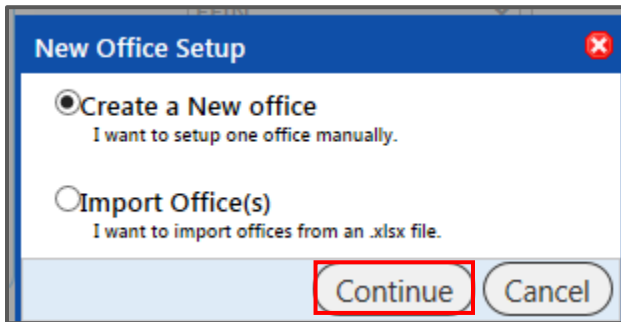
5. From this screen, you can add new offices, access the Reports tab, apply for ERO/Settlement Solutions and access tools to help manage your offices. Click the tabs along the top of the screen to navigate to the various pages.

## Adding New Offices

To add an additional office:

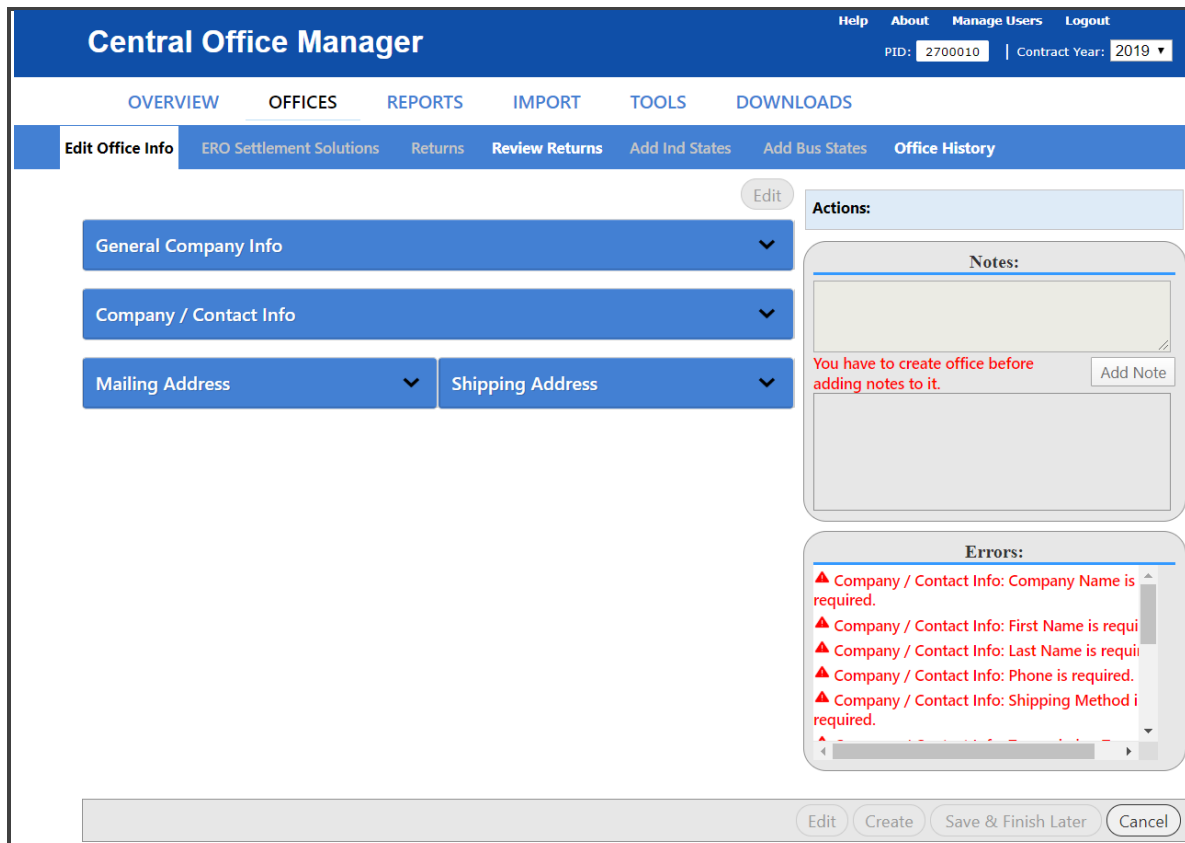
1. Click **Add New Office(s)**.

2. Click Create a New office, and then **Continue**.



**i** If you are adding many offices, you can import the offices from a spreadsheet. The template to import offices is located on the **Download** page.

3. COM displays the **Edit Office Info** tab.



4. Expand each heading to complete the information for:

- General Company Info
- Company/Contact info
- Mailing Address and Shipping Address

**i** Fields with a red asterisk are required.

5. Once you have completed the required fields, click **Create**, or click **Save & Finish Later** to save the draft.

Your Client ID and Registration Code for TaxWise automatically populate on the General Company Info page once TaxWise processes the information. This generally takes an hour or less.

## Applying to Offer Refund Settlement Solutions

After you create an office, you can apply to offer refund settlement solutions with one of our banking partners.

**i** You must complete and submit the ERO Settlement Solution for your main office before submitting those for your add office(s)

To do this:

1. From the Overview screen, click the link to open the **ERO Settlement Solutions Portal**.

The screenshot shows the 'Overview' screen with three main sections:

- Office Information Graph:** A bar chart showing the number of active offices from 2016 to 2019. The y-axis ranges from 0 to 2. The bars represent 1 office in 2016, 1 office in 2017, 1 office in 2018, and 1 office in 2019. A dropdown menu for 'Office type' is set to 'Active Offices'.
- Attention:** A red heading followed by a paragraph: "The Main Office must complete the settlement solutions provider application and be approved by that provider before any sub office application will be approved. Each office offering bank products must read and agree to the ERO Settlement Solutions Enrollment Agreement prior to the start of E-File. As the Main Office it is your responsibility to provide a copy of this agreement to your sub office. CCH SFS has the right to request a signed copy of this agreement at any time."
- ERO Settlement Solutions:** A section with a link: "Click [here](#) for the Settlement Solutions Enrollment Application where you can view available providers, submit applications or check the status."

2. Download and review the **ERO Settlement Solutions Agreement** and verify your office information on this screen.
3. Select the checkbox indicating you agree to the terms, and then click **Continue to Enrollment**.

The screenshot shows the 'Provider Enrollment Portal' interface. At the top, there are two tabs: 'Provider Enrollment Portal' (active) and 'Settlement Solutions'. The main content area is titled 'ERO Settlement Solutions Enrollment Agreement'. Below the title, it states: 'Before enrolling, you must review and agree to the terms and conditions of the [ERO Settlement Solutions Enrollment Agreement](#).' There are three input fields: '\* User Name' with the value 'admin', '\* Client ID' with the value '5000010', and '\* EFIN' with the value '008730'. Below these fields is a checkbox labeled 'I have read and agree to the terms and conditions\*\*'. At the bottom of the form, there is a 'Continue to Enrollment' button.

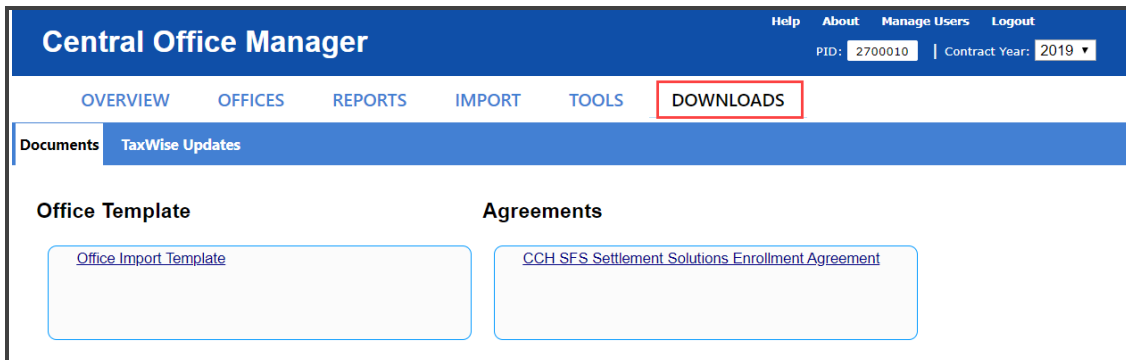
4. Next, click **Get Started** to complete a little more information about your office, choose the banking partner you want to work with, and submit your application.



## Downloads

On the Downloads page, you can find helpful resources, including templates for importing multiple offices, as well as a Settlement Solution Checklist and Release Notes.

1. Click **Downloads** at the top of the page. COM displays the available Office Import Template, the CCH SFS Settlement Solutions agreement, and the Release Notes:



## Tools

From the Tools page, you can carryforward data from the prior year of TaxWise into the current year for multiple offices at once. You can also review returns from multiple offices and send setup information to sub-offices.

1. Click the tabs along the top of the **Tools** page to view each section.

Carry Office Data from 2017 to 2018 [Refresh Grid](#) [Fields Setup](#)

[Select All items on this page](#) [Carry Data](#)

EFIN	Office Name	Ofc Num	Client ID
<input type="checkbox"/> 015808	TWO PROD ACCOUNT FOR TESTING	1	194498
<input type="checkbox"/> 008290	CCH SFS	4	2327971
<input type="checkbox"/> 001485	WOLTERSKLUIWER	8	1040781
<input type="checkbox"/> 001486	CCH	11	191015
<input type="checkbox"/> 008296	SALES	16	2328011
<input type="checkbox"/> 008298	SALES	17	2328037
<input type="checkbox"/> 008302		19	2331668
<input type="checkbox"/> 001516	CCH	23	1161397
<input type="checkbox"/> 004983	SALES DEPT	24	1161405
<input type="checkbox"/> 001550	CCH	25	1161413

« previous 1 2 3 4 5 6 next » 1 2 5 10 25 50 100 500 per page

## Help

To view the Help files for COM:

1. Click the **Help** link at the top of the page.
2. COM displays the Help content on a new internet browser tab. Browse the table of contents or type a keyword to search.

