

Release Notes

CCH Scan

December 2023

Welcome to *CCH® Scan* v.20!

This document provides important information relating to *CCH Scan* v.20, *CCH ProSystem fx Funnel*, *CCH ProSystem fx PDFlyer™*, and the *CCH Scan* integration with *Personal Taxprep®* 2023. Please review it carefully prior to installation, and if you have any questions, please do not hesitate to call the Support Centre at 1-800-268-4522 or register to our Support Platform at <https://support.cch.com/oss/canada> and [submit a support ticket](#).

New: Introducing Wolters Kluwer Support Platform

As part of our commitment to service, Wolters Kluwer is pleased to announce the launch of our new Support Platform.

[Register to our Support Platform](#) to submit, modify and track all your support requests in a single location. A chat feature powered by our virtual assistant is also included, with access to over 40,000 articles from our knowledge base to ensure your inquiries are addressed promptly. Note that **as of December 1, 2023, email support service will be discontinued** and replaced by support tickets created from the new platform.

If you need help during the registration process, please consult the following article to get all the information you need: [How do I register to the new Support Platform?](#)

Register now to our Support Platform and take advantage of all the benefits it has to offer!

NEW IN THIS RELEASE

CCH Scan

Better Classification and Extraction

Algorithms for classifying and extracting data on all forms have been upgraded, allowing for more forms to be recognized more accurately.

CCH ProSystem fx PDFlyer Supports New Adobe® Acrobat® 64-bit User Experience

Adobe Acrobat DC 64-bit User Experience is now supported.

EULA Removed from Installations

The EULA has been removed from installations for *CCH Scan Administrator*, *CCH Scan Workstation* and *CCH ProSystem fx PDFlyer*. Please refer to the [CCH Scan License Agreement](#) for terms.

Form Classification and Extraction

The CCH Scan catalog is updated on a regular basis between January and early April to incorporate new and modified slip types.

To ensure that you get the best results, install the catalog updates that will be released throughout tax season. Note that the automated update functionality is the only means of updating the catalog.

CCH ProSystem fx Funnel

The following enhancements have been added to CCH ProSystem fx Funnel:

- Keyboard shortcuts are now available for the main ribbon and the **New Job** window. A complete list can be found in the Help.
- A **Close** button has been added to close jobs while keeping CCH ProSystem fx Funnel open.

Validate your Scanner Settings for Optimal Results

The quality of scanned images is critical to achieve optimal extraction results with AutoFlow Technology. Having a good scanner that is configured properly will generate greater extraction accuracy. To determine if the output of your scanner is suitable for AutoFlow Technology, please scan the sample slips sent to your firm and submit the resulting TIF or PDF file at <https://support.wolterskluwer.ca/en/sharefile>. Our technical support team will analyze your file and reply to you to confirm if the quality of the scanner output will be likely to produce good data extraction results.

The Minimum System Requirements have changed. They can be found [here](#).

Installation

For detailed instructions for the installation of CCH Scan Administrator, please refer to the [Installing CCH Scan Administrator](#) Help topic.

For detailed instructions for the installation of CCH Scan Workstation, please refer to the [Installing CCH Scan Workstation](#) Help topic.

For detailed instructions for the installation of CCH ProSystem fx PDFlyer, please refer to the [Installing CCH ProSystem fx PDFlyer](#) Help topic.

ACTIVATING THE CCH SCAN INTEGRATION WITH PERSONAL TAXPREP 2023

This section describes how to activate the CCH Scan integration with *Personal Taxprep* 2023. This consists of the following three steps:

1. Enable the integration using your activation key.
2. Configure the integration folders.
3. Configure *Taxprep* Services.

Enable the integration using the activation key

1. Launch *Personal Taxprep* 2023.
2. Enter your CCH Scan activation key (found in the **Activation Key(s)** section of the *Taxprep* Web site) in the **CCH Scan** window:
Tools/Options and Settings/CCH Accountants' Suite/CCH Scan.

Configure the integration folders

1. Set the *CCH Scan* options as applicable for your firm.
2. The search location of the PDF documents entered must match the export folder location (e.g.: \\...\CCH Scan Shared\Export) defined in *CCH Scan Administrator* under the **Folder Settings** tab.

Configure Taxprep Services

If you plan to import data extracted with the AutoFlow Technology, in *Personal Taxprep*, enter the account number and password provided by e-mail to the account holder of your firm. Enter the account number and password under

Tools/Options and Settings/Electronic Services/Identification/Taxprep Services.

You are now ready to use the *CCH Scan* integration with *Taxprep*.

AUTOFLOW TECHNOLOGY - QUÉBEC RL SLIPS

This section presents guidelines to use the AutoFlow technology with Québec RL slips.

Scanning

Québec RL slips, printed and scanned on their own page, will be classified (bookmarked) and extracted as any other target slip. However, if Québec RL slips are printed on the same page as the federal slips, you must physically separate them and scan them as individual pages. If left on the same page during scanning, only one of the two jurisdictions will be classified and extracted.

OCR Validation

- It is strongly suggested to validate federal slips and Québec RL slips with the *CCH Scan* validation tool. By design, some of the printed Québec RL slips have much more shaded areas than the federal slips, and as a result, the extraction accuracy for those documents can be significantly lower. Due to the higher error rate with some RL slips, it is not recommended to bypass OCR validation and import directly into *Taxprep*.
- Correcting the values extracted from these RL slips before importing them into *Taxprep* is very important. Here is why: in the *Taxprep* forms, most Québec fields are calculated and take their values from the matching federal fields, since the amounts are generally the same. For example, the value in the RL-1 box C is by default the same value as the T4 box 18:

Employee's EI premiums	18	483	40	→	C	483	40
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The AutoFlow import process is designed based on the same logic: Québec amounts are imported only if they differ from the federal amounts. To ensure that Québec amounts are only imported when necessary (e.g. really different and not just an OCR error), all amounts should be corrected during the OCR validation stage. When validated Québec values are the same as the federal ones, *Taxprep* will ignore them during the import process and keep the original calculation.

- Special attention should be paid to the issuer name when validating the Québec RL slips. Having the same issuer name on both the Québec RL slip and matching federal slip will help associating them during the import process into *Taxprep* (see below).

Importing into Personal Taxprep

When importing Québec RL slips into *Taxprep*, the Import Wizard will prompt you to match the RL slips with their federal equivalents. This matching process is an important step since the federal and Québec amounts are imported into the same form in *Taxprep*.

The Wizard will suggest the best possible association based on matching issuer names and amounts. For example, if multiple T4 slips and RL-1 slips are present in a PDF, the Wizard will suggest an association when the same issuer name is found on a T4 and an RL-1 slip and when some specific amounts match, in this case the T4 box 55 with the RL-1 box H. Make sure to always verify the suggested association and correct it when needed so the destination form is properly selected in *Taxprep*.

Upon importing the values, both the federal slip and Québec RL slip in the PDF document will be linked to the same form in *Taxprep*.

Available alternatives for Québec RL slips

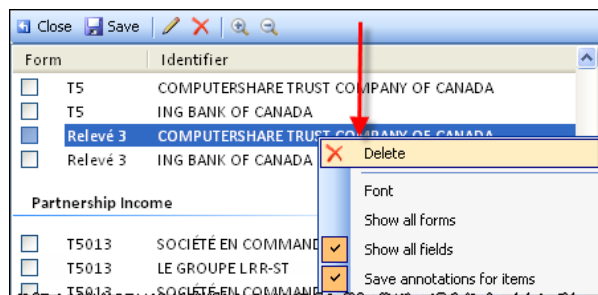
Depending on your average type of slips, overall image quality for RL slips, availability of validation staff, and general workflow, you may consider using a different strategy for Québec RL slips. Here are some possible approaches:

Approach 1 – Use AutoFlow with specific Québec RL slips only

You can choose to use AutoFlow only with Québec RL slips that have different amounts from their equivalent federal slips. Examples of those include income tax slips, such as RL slips 1 and 2. The OCR validation time and AutoFlow process for these documents have more benefits since, in the end, several amounts will be imported into *Taxprep*.

For Québec RL slips that are identical to their federal counterpart, e.g. investment income such as T3/RL-16, T5/RL-3, and T5008/RL-18, using AutoFlow has fewer benefits since identical amounts are not imported. You can reduce the OCR validation time for those RL slips in two different ways:

- The fastest method is to delete these Québec RL slips from the CCH Scan validation tool. The right-click the form, and select **Delete**:
As a result, the deleted Québec RL slips will be bookmarked in the PDF, but no amounts from these slips will be imported. The drawback of this method is that it prevents *Taxprep* from suggesting an association with the federal slip at import time.
- A longer method, but still faster than a full OCR validation that includes finding missing fields, is to keep the form and delete all of the values, except for the issuer name. Keeping the issuer name will allow *Taxprep* to suggest an association with the federal slip at import time, in the case where this issuer name is unique among all federal slips. Another benefit of this method is that the issuer name will be appended to the Relevé bookmark name in the PDF.



Approach 2 – Use AutoFlow with federal slips only

It is possible to use AutoFlow with federal slips only. To do so, follow the same steps as the first approach, deleting all Québec RL slips, instead of selected RL slips only.