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# CCH Entities Trusts – People/Companies Without Links, Archive a Trust & Health Check report

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## 1. Run a People without Links report

This will show you people who are on your database but not linked to a trust or company. Often these are people left behind when a trust or company is deleted. Deleting these will tidy your database and make it quicker to find the people you do need to work with.

## 2. Run a Companies without Links report

This will show you companies that are on your database but not linked to a trust. Often these are companies left behind when a trust is deleted. Deleting these will tidy your database and make it quicker to find the companies you do need to work with.

The screenshot shows the CCH iTrust software interface. At the top left is the Wolters Kluwer logo. Below it is a navigation bar with 'Dashboard', 'Reports', 'Setup', 'About', and 'Logout'. On the right side of the navigation bar, it says 'CCH Companies and CCH iTrust'. Below the navigation bar, there is a sub-header 'Reports' and a user identifier 'CCH Demo System With Data - Karen Rogers'. The main content area is divided into four columns: 'Trust Reports', 'People Reports', 'Company Reports', and 'Other Reports'. Under 'People Reports', the item 'People Without Links' is circled in red. Under 'Company Reports', the item 'Companies Without Links' is circled in red.

Trust Reports	People Reports	Company Reports	Other Reports
Checklists	AML Expiry	AML Expiry	Anywhere Search
FATCA Registered Trusts	AML Status Review	AML Status Review	Event Log
Gifting Due	Beneficiaries by Age	Annual Return Due	Export Companies
Health Check	Companies for Selected Person	Checklists	Export People
Trust Responsibilities	People Active in Portal	Companies Active in Portal	Export Trust Relationships
Trust Roles	People Without IRD Number	Companies for Selected Company	Export Trusts
Trusts Without IRD Number	<b>People Without Links</b>	Companies Without Directors	
Unsigned Documents	Power of Attorney	Companies Without IRD Number	
Vesting Due	Trustees by Age	<b>Companies Without Links</b>	
	Trusts for Selected Person	Health Check	
		Trusts for Selected Company	
		Unsigned Documents	

## 3. Archiving

Trusts or companies that you are no longer actively working with can be moved to the Archived status. Archiving will keep a read only copy of the data in your system.

Trust Listing (35)

CCH Demo System With Data - Karen Rogers

New

Modify

Delete/Archive

Print Summary

Trust Search

Person Search

All Managers

All Statuses

All Trust Types

All Trust Groups

All Trust Categories

Active Trusts

Trust No	Trust Name	Status	Manager	Type	Category	Group
2	<b>McIntyre Training Trust</b>	Archived	Claire Roper	Family Trust	Gifting	Auckland Central
3	CCH Training Trust	Active	Doris Upton	Family Trust	Gifting	Auckland North
4	Freeman Family Trust	Active	Doris Upton	Family Trust	Gifting	Auckland Central
6	Pereira Family Trust	Passive	Gus Hatton	Family Trust	Gifting Complete	Hamilton
7	Rochdale Family Trust	File	Gus Hatton	Family Trust	Gifting Complete	Private
8	Tulloch Family Trust	Active	Claire Roper	Family Trust	Gifting Complete	Wellington
9	Cooper Family Trust	Active	Suzy Taylor	Family Trust	Gifting	London
11	Jones Family Trust	Active	Suzy Taylor	Family Trust	Gifting	Auckland Central
12	Masters Family Trust	Active	Suzy Taylor	Will Trust	Gifting	Auckland North
21	Happy Days Trust	Active	Jenny Dawn Davies	Family Trust	Gifting	Auckland Central
22	Take That Trust	Active	Bob Brown	Family Trust	Gifting	Private
23	Rogers Family Trust	Active	Bob Brown	Family Trust	Gifting	Auckland Central
32	Suzy's Trust	Active	Bob Brown	Family Trust	Gifting	Auckland Central
34	Support Trust	Active	Bob Brown	Family Trust	Gifting	Auckland Central
46	Jason Freeman Trust	Active	Gus Hatton	Family Trust	Gifting by Others	Hamilton
49	One Two Three Family Trust	Active	Suzy Taylor	Family Trust	Gifting	Auckland Central
53	Kyle Mills Family Trust	Active	Bob Brown	Family Trust	Gifting Complete	Auckland North
60	The Smith family trust	Active	Bob Brown	Family Trust	Gifting Complete	Hamilton
63	Anderson Trust	Active	Bob Brown	Family Trust	Gifting	Christchurch

Archived records can be stored on the system free of charge but cannot be returned to the Active status so do think carefully before making the change.

Delete/Archive Trust - McIntyre Training Trust



This Trusts has the following links:

Relationships, Responsibilities, Notes, Assets, Gifting, Distributions, Documents, Tasks

Deleting this trust will remove the trust and all the information linked to this trust. It will not be able to be retrieved. Please select the archive option if you would like to keep history of this trust.

Archiving this trust will flag the trust as archived. You will not be able to make any more changes but details will remain on file. An archived trust will not be charged for.

Action

Archive this Trust

Proceed

Cancel

# 4. Health Check

Don't forget your entire system Health Check report to keep the data you are actively working with in great shape.

The screenshot shows the Wolters Kluwer interface with a navigation menu and a reports grid. The 'Health Check' item is highlighted with a red circle.

Wolters Kluwer

Dashboard Reports Setup About Logout ? CCH Companies and CCH iTrust

Reports CCH Demonstration Limited - Suzy.hardy@cch.co.nz

Trust Reports	People Reports	Company Reports	Other Reports
AML Check Review	AML Check Review	AML Check Review	Anywhere Search
AML Status Review	AML Status Review	AML Status Review	Event Log
CDD Review	Beneficiaries by Age	Annual Return Due	Export Companies
Checklists	CDD Review	Annual Return Emails	Export People
FATCA Registered Trusts	Companies for Selected Person	Annual Returns Bulk Filing	Export Trust Relationships
Gifting Due	People Active in Portal	Annual Returns Completed	Export Trusts
<b>Health Check</b>	People Without IRD Number	CDD Review	Merge People
Trust Responsibilities	People Without Links	Checklists	
Trust Roles	Power of Attorney	Companies for Selected Company	
Trusts Without IRD Number	Trustees by Age	Companies Without Directors	
Unsigned Documents	Trusts for Selected Person	Companies Without IRD Number	
Vesting Due		Companies Without Links	