Mary Girsch-Bock • Aug. 27, 2018

CCH Axcess Tax

Wolters Kluwer Tax & Accounting

CCH Axcess Tax offers users an intuitive user interface screen that is designed to resemble Microsoft Office, so users will be comfortable with system navigation from the start. Users can easily customize the Quick Access Toolbar to provide access to frequently used system functions. Dashboard functionality provides users with instant notification when a return needs attention. Users can also customize the Return Manager function, where displayed data can be completed and customized based on current needs, with the Returns pane offering two expandable sections; Quick Search and Views.

To get started, users can print blank organizer forms to provide new clients in order to collect initial data, with users able to print organizers beginning with the 2010-2011 tax year. CCH Axcess contains eight major return types: Individual, Corporation, Partnership, Fiduciary, Employee Plans, S Corp, Gift Tax and Non-Profit. Color coded data entry helps users to quickly identify tax return types and input fields alike.

CCH Axcess Tax supports all U.S. tax returns including federal, state, and local and municipal returns where required. Common forms such as 1040 Individual, 1065 Partnership, 1120 Corporation, 1120S Corporation, 1041 Fiduciary, 706 and 709 Estate and Gift Tax, and 990 Exempt Organizations are supported, with users able to also process prior-year returns when necessary, as well as roll forward prior year totals for easy preparation of current year forms.

CCH Axcess Tax offers electronic filing for all forms that are supported in the product, including any state that currently accepts electronic forms. The e-filing system also offers a review report, where users can view any alerts, errors, or rejections. Users can also easily view the status of any e-filed form if desired. The product also links to CCH IntelliConnect and AnswerConnect, where users can research topics and find answers to questions without exiting the application.

The CCH Axcess Portal, which integrates with CCH Axcess Tax, offers users a secure

tax return, bookmarking the PDF file and saving it to CCH Document, where it can be accessed electronically at any time.

CCH Axcess and CCH ProSystem *fx* applications are all designed to integrate, providing firms with the ability to automate the complete tax compliance process from obtaining client documents throughout the year. CCH Axcess Tax integrates with all CCH Axcess and CCH ProSystem *fx* applications including the CCH Axcess Portal for easy document sharing, CCH Axcess Workstream, which allows easy tracking of the tax return and where it is in the approval process, CCH Practice, for complete practice management capability, and CCH eSign, which facilitates requesting and obtaining client signatures on tax returns and other documents by providing clients with a secure link that allows them to review and sign the complete tax form. eSign can be accessed from a user's desktop system, smartphone, or tablet. Mentioned earlier, CCH Axcess Tax also integrates with CCH IntelliConnect and AnswerConnect, Wolters Kluwer web-based tax and accounting research platform that users can access without leaving the tax preparation interface. Along with CCH Axcess applications, the product also integrates with CCH ProSystem *fx* applications which include CCH ProSystem *fx* Scan, CCH ProSystem *fx* Practice Management, and CCH ProSystem *fx* Document.

CCH Axcess offers a variety of help and support resources to system users, with help functionality found throughout the application. There are also a variety of resources available online such as the comprehensive Help file which provides access to all system functions and their corresponding functionality. Users also have access to a completely searchable knowledgebase which can be accessed 24/7, as well as product guides and videos, and a community forum. Users can easily connect to CCH Axcess support via chat or email, with telephone support available as well. All support is included in the price of the product.

CCH Axcess Tax offers accounting professionals a variety of features and functionality

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