Technology

www.tax.cchgroup.com

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From
the Sept. 2008 Feature on *Scan/Fill/Populate*
Systems

The ProSystem *fx* Scan system, which was originally called BOCDIP and which was a recipient of a **2006 Tax & Accounting Technology Innovation Award** (www.CPATechAdvisor.com/go/1196),
was one of the first breed of document recognition scanning systems. The program essentially works by allowing users to scan in all of a 1040 client's tax-related forms, statements and other documents, with the system using optical character recognition technology (OCR) to identify what the individual documents are and then produce a fully bookmarked and logically organized PDF file that includes all of the documents.

This results in a fully digitized set of workpapers that can be used in a dual-screen setup to review a client return. Bookmarks can be sorted to meet firm workflow needs, and the program includes strong search functionality for retrieving specific forms within client records. Since the program is part of the ProSystem *fx* Suite, it also offers integration with CCH's tax, write-up and document management systems, as well as with the vendor's client collaboration portals. Through the optional PDFlyer module, users are also given enhanced PDF review capabilities, such as the ability to move pages and bookmarks within the document, utilize tickmarks and connectors, or resize and rotate document views.

For the 2008 tax year, CCH has added the optional AutoFlow Technology system

Both Scan and its AutoFlow system are locally installed on the firm's computers, which keeps all data in-house and generally provides for more intuitive ease-of-use, but can result in slower processing times when compared to systems that securely route form data to large processing centers with larger server arrays performing the work. CCH does offer some of the benefits of the server-side technology, however.

"During tax season, when time is at a premium, AutoFlow Technology will shift 1040 data entry functions away from a firm's professional staff," said Bob Dias, CCH Vice President of Product and Segment Management. "Any solution that saves significant professional time is obviously of huge benefit."

AutoFlow Technology is imbedded in Scan v4.0 and available to all ProSystem *fx* Scan users without an additional license fee. A per-return transaction fee is applicable for importing the extracted information into ProSystem *fx* Tax. The list price per return is $15, irrespective of the number of imports or the number of forms imported. The $15 authorization list price has been reduced to $10 for an initial promotional period.

Forms Supported for Automatic Population: W-2, W-2G, 1098, 1098 T, 1099 DIV, 1099 INT, 1099 MISC, 1099 Q, 1099 R, 2439, SSA 1099 On the development roadmap: Forms K1-1065, K1-1041 and K1-1120S, Combined Statements.

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