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This application is designed primarily for tax practices that are using either the ATX or TaxWise tax preparation products. Either of these products will integrate directly into the Scan&Fill product for the respective product line. Scan&Fill is in a unique class of its own because its primary value is derived from the following:

- the ability to recognize and "lift" data from scanned 1040 input documents and transfer the data to the tax preparation software, and
- the AutoFile feature, which reduces steps by identifying and assisting the user with dropping recognized documents in the client's Document Manager folder.

From the June 2009 Review of Document Storage Systems

USER INTERFACE:
The user interface provides a typical command menu and toolbar combination along the top of the screen to process and work with files. Along the left side of the screen is an active client folder list. The clients are organized alphabetically by name, followed by the Social Security Number. You can access a client's files by clicking on the folder tree, similar to Windows Explorer.

The most unique aspect of the user interface is the Scan&Fill auditing screen. It consists of three tabs: Forms, Image and Fields. This display lets you view the scanned document image of the form and also an interactive form that resembles the tax software input sheets. This form displays the data that was recognized and transferred to the appropriate form field, i.e., EIN, taxable earnings, tax withheld, etc. You can markup this form to identify which fields you have verified are accurate or need further review. You can also add comments to specific form fields. As you work through the form, tick mark symbols are placed next to each field to identify the review status. The system will automatically mark whether or not a form has been reviewed to help ensure that nothing falls through the cracks. You can also add comments to the form to make it a truly interactive workpaper. Once you are satisfied

The files are organized by client folders. Within each client, a subfolder for each tax year is set up, followed by a template of subfolders for the various document types. You can establish a default folder structure template that can be applied to all new clients. This feature can also be used to update the existing folder structure for all existing clients. An example would be if you decide you want to add a new folder to all existing clients.

An additional "category" field is available to categorize your clients by any unique description, i.e., individual, corporate, etc. You can also have non-client folders to store firm documents. In the release scheduled for August 2009, the vendor says it will include a permanent folder that will be created for each client outside of the tax year folders.

INTEGRATION:
The key integration is with the ATX and TaxWise tax preparation products. On the inbound side, you can print and file tax returns directly into the document storage system automatically. When you print to the Document Manager from the tax software, it automatically places it in the proper client and folder. On the outbound side, you can transfer the "recognized" forms data directly as data input to the tax software. You can also e-mail documents as attachments directly from within the respective tax preparation products.

OVERALL VALUE:
CCH Small Firm Services provides a pretty comprehensive solution for managing the storage of your tax-related documents. When you add on top of that the whole Scan&Fill functionality, the system has the potential to provide significant time savings in regards to data re-entry. It should be noted that the Scan&Fill functionality currently recognizes W-2s, 1099s and new this year, form 8879, though any document can be scanned for electronic storage of client documents. The

software is priced at $725 for the initial license and an annual renewal fee of 50

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