CPA
Practice **Advisor**

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sole practitioners can benefit from the variety of integrations and feature offerings of these products.

All of the advanced workflow tax systems include full federal support for individual, business, nonprofit and other major category tax compliance. Most state and local filings are also supported, as well as full support for federal electronic filing for all applicable compliance modules. Several of these systems also added multiple state partnership and corporation electronic filing modules for tax year 2010. This level of tax compliance support can greatly decrease the amount of time and frustration associated with locating, filling in and supporting forms not natively included in many lower-tiered products.

The look and feel as well as the way data is entered into the return is a key differentiator in this product review lineup. Although the basic navigation structure is similar in many of these products, the user interfaces differ greatly, giving practitioners another item to consider when choosing tax software. Since the user experience impacts the firm's productivity based on its processes, people and culture, this is an area where multiple individuals at your firm should evaluate the strengths and weaknesses of competing products before making a final decision.

For tax year 2010, the advanced workflow products have continued work on integrating
their tax solutions with other product offerings. Each of these systems tightly integrates with product offerings through their respective vendors and has the ability to transfer data between applications. Third-party integration is another key differentiator. Some only offer support for their respective suite of products, while others are more open and allow data access to and from other software vendors. Many vendors supplement the capabilities of their flagship tax applications

with optional add-on tools, which assist with issues such as cross-border

integrations include direct import of web organizers, and many products offer scan-and-populate capabilities.

One area that all vendors have enhanced over the last 10 years is the support provided for remote access applications, with many offering products that are wholly Internet-based or have portions of their respective software suite hosted. These software as a service (SaaS) and hosted offerings can save firms significant upfront costs in both hardware and software. Nearly all of the vendors offer month-to-month per-user pricing without long-term contracts. This allows firms to gradually migrate to SaaS solutions with full scalability as firms add employees. These SaaS solutions are also ideal for firms with multiple locations, as they reduce the amount of IT knowledge necessary to deploy and support the applications.
Microsoft Internet Explorer 7 or later is often required to access such products, which could create issues for firms that have users on operating systems other than Windows.

Editor's note: With the publication's new name
and format, we will be providing short summaries of our reviews in the magazine's print edition, highlighting key components that you've asked us to provide. Although the more detailed reviews you have come to expect from our magazine are not being printed in their entirety, they are still being created with each product review cycle. We will continue to include an archive of the information in each printed issue, along with the more detailed individual analyses and evaluations of each product reviewed here on our website. By moving the detail on each review to the website, we hope to be able to provide content beyond what could be included economically in a "print only" publication, as well as include timely links to other materials which could be useful to

readers. Feedback on the new format is welcome; please send any comments or

Tax) and an Internet-hosted product (Global *fx*). Although both are similar in functionality, this review focuses on the traditional, DVD-based product. CCH prides itself on the annual enhancements made to ProSystem *fx* Tax, and for 2010, CCH has enhanced integration with new and existing ProSystem fx Suite products as well as introduced new features. The significant additions include enhancements to the electronic filing system, the ability to mask social security numbers and bank account information on printed copies of returns, and the ability to prepare consolidated partnership returns.
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Lacerte Tax, an Intuit ProLine Solution

Lacerte Tax is the top-tier tax compliance offering in the Intuit ProLine product lineup. Lacerte Tax showcases a flat workflow environment. This allows for intuitive and quick data input and simple workflow navigation. New for tax year 2010, is an organizer for trust returns. This organizer can aid clients in assembling necessary data to complete trust returns as well as allow staff to utilize the organizer as a workpaper. Other new offerings include a new mechanism for tracking extension payments and the addition of partnership and corporation electronic filing for several state jurisdictions. Improvements have also been made to the Internet-based peer-to-peer training video options available through Intuit's website.
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Thomson Reuters – GoSystem Tax

year 2010 include enhancements to print preview modes, a new print system for trust returns, improvements to batch PDF printing for partnership and corporate returns, as well as the ability to directly link capital gain activity to Form 8453. Also new for this year is a Product Assistant Display, which, when activated, filters product notifications and updates to show only those items that are applicable to that particular return.

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Thomson Reuters – UltraTax CS

UltraTax CS fills the roll of tax preparation software within the popular Thomson Reuters CS Professional Suite. For tax year 2010, the UltraTax CS team has continued its focus on streamlining the data-entry process and helping reduce the amount of duplicate data entered. New for this year, is full integration with Accounting CS (an accounting product launched in mid-2010), enhanced data sharing for non-resident K-1 data for individual returns, and an expanded use of a text annotation library that stores frequently used text, such as draft copy. Also new this year, is the system's ability to automatically assign a complexity ranking to returns and create a graphical five-year analysis consisting of the prior three tax periods, the current tax period and a projected period.

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Review

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Tax Compliance Systems

For reviews of additional professional tax compliance systems, please see the this review category, which includes many programs

designed for traditional small and mid-sized professional tax and accounting

office, and manages a tax and technology consulting practice in Oklahoma City. He has served on the Board and has recently served as chairperson for the Oklahoma Society of CPAs' (OSCPA) Technology Committee. Steven has given numerous presentations
and training sessions on various technology topics for the OSCPA and other organizations
throughout Oklahoma.

Taxes • Technology