CCH, a Wolters Kluwer business — ProSystem *fx* Tax SaaS

CCHGroup.com

800-739-9998

BEST FIT: Tax and accounting firms with a wide range of client complexity who need a top tier tax preparation product.

STRENGTHS

- Multiple platforms to choose from, including a state-of-the-art SaaS solution
- New interface should be familiar for users already converted to Office 2007/2010
- Strong electronic filing support for both state and federal returns

POTENTIAL LIMITATIONS

- Only a few SaaS Suite products have been released, and more than one is typically required to realize the Suite's full potential
- SaaS solution performance may lag without adequate broadband speed, especially for multiple users

ProSystem *fx* Tax is now offered as three separate solutions, ProSystem *fx* Tax,

CORE PRODUCT FUNCTIONS/FEATURES

CCH prides itself in listening to and implementing client requests and ProSystem *fx* Tax SaaS fully incorporates this methodology. The newest offering has been developed on the latest .NET technology available through Microsoft. Upon opening the software, the client management screen looks and works very similar to the traditional desktop version and includes all of the same search and filter options to assist finding returns. When a return is opened, however, the new interface becomes apparent. ProSystem *fx* Tax SaaS borrows heavily from Office 2007 in that it has a similar icon layout and relies on a "ribbon" style menu for program navigation. The ribbon is not customizable but a small quick access toolbar is available which is fully customizable (again very similar to Office 2007). Navigation within each section of the return is done through a folder tree structure on the left side of the screen. Data input remains very similar but at times did appear a little slower than the traditional desktop interface.

ProSystem *fx* Tax SaaS has comprehensive support for electronic filing. Over 30 state electronic filing forms were added for the current year and nearly all state electronic filing is now supported. The individual return module is now fully compliant with Modernized e-file and all qualifying returns will default to this method when filing electronically. Most state returns for individuals have been converted to the new platform. A new electronic filing status report is present and indicates if returns qualify for electronic filing. This status report also serves as a layer of protection to prevent ProSystem *fx* Tax SaaS from uploading disqualified returns. Legacy electronic filing options are still available for those preparers that require them. Upon acceptance of an electronically filed return, an email may be automatically generated

to notify clients of the acceptance of federal and appropriate state and local returns.

from these templates but may also be individually modified as desired on a return-by-return basis. The tools to create and modify these templates are more complex than a typical word processor, and may require training to be used effectively. Program help is accessible through a drop down menu and is displayed in the users default web browser. The online support resources include a traditional index and a searchable knowledgebase. The support portal is updated frequently based on commonly asked questions.

The traditional desktop version of ProSystem *fx* Tax has also received some updates in the current year release, and now supports dual monitors. This allows the data input sheets on one screen and the government form display on the other. Batch printing of individual return extensions is now available as well and each extension may be pushed through the electronic filing system.

INTEGRATION

ProSystem *fx* Tax SaaS is the centerpiece of the new ProSystem *fx* Suite SaaS product lineup. Each product has been developed on the latest technology available, is fully hosted through CCH and provides a firm with all tools necessary to maintain a unified workflow. All products within the ProSystem *fx* Suite SaaS are connected through a dashboard application. Since ProSystem *fx* Tax SaaS shares a common database with all products within the suite, any changes made are automatically pulled into each respective product.

The tax preparation applications directly integrate with CCH's Intelliconnect and

As previously noted, ProSystem *fx* Tax SaaS is part of a suite of products. CCH's workflow management tool, ProSystem *fx* Workstream, provides a tracking module to track tax return due dates. Due dates for payroll reports, financial statements, and other assignments can be tracked through this system as well. New for 2011, ProSystem *fx* Tax SaaS incorporates a paperless routing sheet through ProSystem *fx* Workstream. The routing slip allows users to update and monitor the status and location of a return as it is being prepared. ProSystem *fx* Tax SaaS now includes the ability to batch print client organizers directly to respective client portals. ProSystem *fx* Tax SaaS also efficiently integrates with ProSystem *fx* Scan, Portal and Document.

REMOTE CAPABILITIES

ProSystem *fx* Tax is offered as two hosted solutions. The first, ProSystem *fx* Tax SaaS is a hosted solution and is reliant on users to download a small program locally. This program merely displays the interface as described in this review. The second is Global *fx* which is a web based product that is accessed any Internet connected device with access to Internet Explorer version 6 or higher. The same rules engine provides all the necessary updates, storage and calculations needed to accurately prepare each return. Both solutions are fully scalable from 1 user to several thousand and have maintained greater than 99.99% uptime availability over the past 12 months. Unfortunately, most current smartphones and tablets are unable to natively access either tax solution.

SUMMARY & PRICING

ProSystem *fx* Tax SaaS represents the next generation tax compliance solution from

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