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CCH Small Firm Services – ATX

www.atxinc.com

Phone: 866-345-4172

Strengths:

- Compliance for all entities including federal and state plus local forms
- W-2/1099 and wage reporting options
- Form and interview-style input
- Available bundles for Workflow, Research and Accounting functions

- Integrated AR management and credit card acceptance

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The ATX line of professional tax compliance and accounting solutions, offered by CCH Small Firm Services, includes applications for preparation of returns for all taxable entities, trial balance, payroll, fixed asset management, client accounting and practice management tools. The system includes tools for paperless tax engagements, automation of data entry, unlimited e-filing, options for bank products, built-in accounts receivable management and credit card payment acceptance.

Core Product Functions/Features

ATX is available in three packages, starting with a 1040 and three states version, and moving through the most comprehensive MAX package, which provides compliance for 1040, 1041, 1065, 1120, 1120S, 706, 709, 990 and 5500 returns and amended versions, with all states and unlimited e-filing. An optional Ohio Cities compliance utility is offered separately. The program supports multi-state 1040 returns. The MAX package includes integrated payroll compliance forms and tax research from CCH. ATX also includes tools for managing kiddie tax returns, determining AMT, comparing MFJ vs. MFS and managing self-employment tax.

The tax program's home screen is the Return Manager, which centers on a client list that is based on the user's access rights or assigned group. The spreadsheet view displays summary client and return data, with tabs for accessing more detailed accounts receivable functions, such as viewing aging and billing information. Additional tabs are available for accessing e-filing functions, bank products, data rollover, preparer management and the Tax Warehouse, a centralized overview of return details such as AGI, income, tax, refund, amount due, credits, and exemptions.

When working on client tax returns, ATX offers a choice of data entry using an interview process or entering data directly on the form. The interview format offers less experienced users a guided format that helps ensure that all tasks are performed.

All related forms, worksheets and schedules associated with the current return can be

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ATX has offered an optional paperless workflow tool for several years now. Previously called Scan&Fill, the system has been redesigned with a new interface and enhanced with a faster processing core and expanded forms set. This new PaperlessPLUS module is geared toward giving tax firms an easy-to-use document management utility that lets users store client source documents, returns, cover letters and even email communications and other documents in a single electronic client folder. PaperlessPLUS automatically backs up stored data, and also includes user-level access rights, tools for emailing password-protected items from within the program, and the ability to integrate with electronic signature pads. Users can also make use of other privacy features, such as suppressing of SSNs/TINs, and the ability to mask other sensitive information when preparing client copies.

CCH Small Firm Services also offers PaperlessPLUS Premier, which pairs the PaperlessPLUS system with Optical Character Recognition (OCR) scanning technology. Premier Scan automatically organizes all scanned documents into a single PDF and stores it inside the client's folder. The system also reads 2D barcodes on W-2 and K-1 forms as well as data on most W-2s and 1099s without barcodes. Recognized data can be directly imported into a return in ATX, with no manual entry required. ATX does not offer client portals or web-based tax organizers.

In addition to the email feature in the PaperlessPLUS system, other client communication functions include customizable templates for instructions, cover letters and invoicing.

Integration

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The core ATX tax system includes basic depreciation capabilities, with more advanced functions available through the Fixed Asset Manager program offered as an optional add-on. These features include multiple books per asset, support for traditional and custom depreciation methods and various disposal options. Other optional accounting modules, include Trial Balance, Payroll and Payroll Compliance, and Client Accounting Suite, which offers a small business bookkeeping alternative to off-the-shelf software. ATX includes a basic tax planner to project multi-year tax estimates.

For tax research, firms have access to the online IntelliConnect system (included with the MAX package), which provides libraries of primary source materials for tax and accounting, such as the Internal Revenue Code, Treasury Regulations, rulings and court cases, in addition to news, advice and practice tools. Firms can also access the CCH Master Tax Guide, CCH's Tax Handbooks, the Federal Tax Day, state research options and TaxTalk. Research options are also integrated into the program, with right-click menu access to instructions and information.

Other integration options include the ability to offer clients their tax refund proceeds on debit cards, with or without using a loan, as well as bank products from several institutions, such as electronic refund checks. Firms can also have their fees deducted from client refunds, and the built-in AR module offers credit card payment acceptance.

Help/Support

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Phone and web-based support is included with system pricing, with all staff based in the U.S. Live support during tax season is available from 8am to 10pm (ET), and on Saturdays from 9am to 6pm.

Summary & Pricing

The core tax compliance, e-filing and practice management functions in ATX are easy to learn and use, with options that can aid novice users or more professional preparers. The comprehensive system receives added value from the optional accounting and workflow tools, including PaperlessPLUS. ATX also offers good research and training options.

Pricing for ATX packages starts at \$520 for 1040s and three states. The most comprehensive package, MAX, is \$1,249, which includes W-2/1099 compliance, payroll reporting, tax research and free, unlimited electronic filing. The system is also available on a pay-per-return basis with a \$199 annual fee and prepayment of \$300 for the first 15 returns.

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