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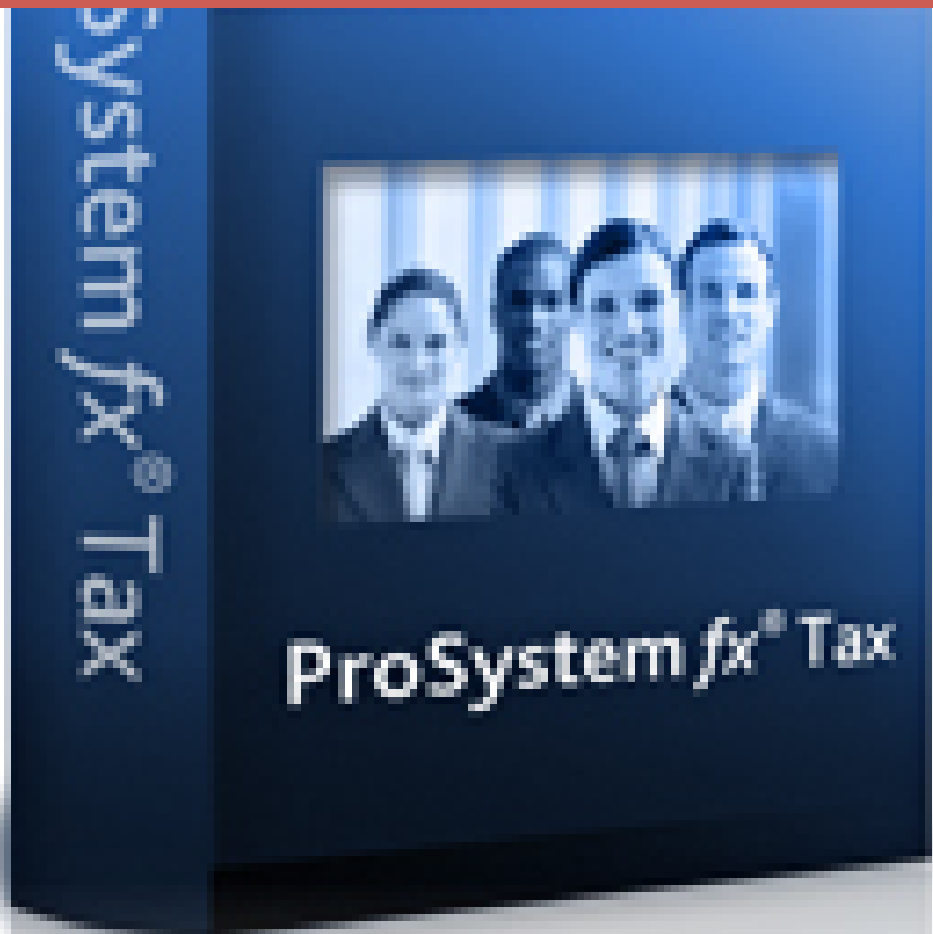
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GlobalFx.

Steven M. Phelan • Apr. 21, 2014

ProSystem *fx* Tax is the traditional tax service offering provided by CCH. It is intended as an in-house solution, but is also offered as a hosted solution branded as Global *fx*. ProSystem *fx* Tax provides extensive integration with other ProSystem *fx* suite products and can handle many complex tax returns and tax issues. New for the current release are enhancements to the electronic filing platform, a new software delivery method and a just released e-signature solution.

Core Product Functions/Features: 5 Stars

throughout ProSystem *fx* Tax continues to be the key differentiator between the two. ProSystem *fx* Tax utilizes a static, drop down menu navigation structure, while CCH Axcess Tax utilizes a folder tree structure. All data input worksheets and forms populated with current or prior year data are highlighted in blue.

Major enhancements for the current year release center around the addition of multiple electronic filing options. Over 30 new state returns, mostly in the business module, have been added for the current release. Email automation has been added to inform both the preparer and client of acceptance of electronically filed returns. Reminder emails may also be sent to prompt clients to send in the required electronic filing signature sheets. Newly added is the ability to send quarterly estimated tax payments from within the system.

Mobile applications are provided for Android and Apple devices. Though no tax processing or client file access is provided through these apps, users can check electronic filing status and deliver appropriate information about this directly to clients. The apps are provided for free, but will require user login credentials.

Just released is CCH eSign, which ties directly into ProSystem *fx* Tax. CCH eSign is a new service designed to securely deliver signature returns forms to clients through a secure portal and allow clients to digitally sign with their tablet or smartphone though finger or stylus. This may drastically reduce the time needed to retrieve the required Form 8879s, especially as deadlines near.

Integration: 5 Stars

ProSystem *fx* Tax is part of a suite offered by CCH that includes multiple software solutions. Each of these solutions shares a common database to share information. This allows all names and contact addresses to be consistent throughout the suite.

With the addition of the CCH Axcess suite of products, many of those solutions will

Direct links to IntelliConnect and other CCH online research solutions are provided through a right click menu option. As users navigate through the system, the research options change to mirror the screens the user is currently viewing. This drastically reduces the amount of keyword searches that would ordinarily be required. Users will need a valid login to access these separately offered research solutions.

Paperless Workflow: 4.75 Stars

ProSystem *fx* Scan, available separately as part of the ProSystem *fx* suite, provides a wide range of solutions that integrate directly with ProSystem *fx* Tax. Documents may be scanned into ProSystem *fx* Scan where data from source documents is extracted, verified and directly imported into ProSystem *fx* Tax. This process can significantly reduce data entry time and errors. At this time, this process is only available for individual tax returns.

A new review tool was added with the current release allowing users to double click from the form output all the way to input, viewing each appropriate calculation along the way. Multiple monitors may be used with data entry on one screen and compliance forms on another. Each screen will move in conjunction with the other.

ProSystem *fx* includes a comprehensive diagnostic system, which tests for omissions and potential inconsistencies. Each diagnostic is detailed and many provide a direct link to the underlying data input worksheet or form to guide users how to fix potential errors.

Reviewers have up to three tickmark options that are available on both the data entry worksheets and the on-screen return forms. Each tickmark is delineated by a red, blue or green color scheme to easily see who has approved or reviewed the return.

Remote Capabilities

ProSystem *fx* Tax is intended to be installed on local machines. CCH does provide

year.

Summary & Pricing: 4.75 Stars

ProSystem *fx* Tax is the traditional network and client installation solution offered through CCH. With the ability to calculate complex returns and wide range of supported forms, ProSystem *fx* is a solution for firms of all sizes. Pricing for ProSystem *fx* Tax is largely based on the number of client returns processed. An unlimited Federal individual module is available starting at $1,575 with unlimited state modules starting at $550 each. Returns may also be purchased individually under a per-return-pricing model. Pricing may be eligible for discounts depending on number of modules purchased, user needs and total returns processed.

BEST FIRM FIT

Firms with one location desiring a comprehensive in-house solution to handle complex returns

STRENGTHS

- Multiple integration points
- Ability to calculate complex returns
- Newly released CCH eSign

POTENTIAL WEAKNESSES

- Few online integration options

2014 Overall Rating: 4.75 Stars

Income Tax • Software • Taxes

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