

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

function and value, with bundle options that include tax compliance, research, payroll compliance and document management tools for tax professionals. New for the current year are integration points with PortalSafe, an online portal solution and an improved print manager.

Steven M. Phelan • Apr. 21, 2014



ATX is a tax solution provided by CCH Small Firm Services with a primary focus on function and value, with bundle options that include tax compliance, research, payroll compliance and document management tools for tax professionals. New for the current year are integration points with PortalSafe, an online portal solution and an improved print manager.

Core Product Functions/Features: 4 Stars

ATX includes most forms to fully process individual, business, trust, specialty and

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

New this year for network installations is enhanced security to help protect client and firm data. The system includes several levels of access rights, enabling firm managers or administrators to determine which clients and functions staff have access to. Up to three users may simultaneously access the software. Currently limitations are in place that prevent multiple users from simultaneously accessing a single client file, which helps prevent data overwriting.

Unlimited electronic filing for individuals and many business returns is included in pricing. Unlimited federal electronic filing for trusts and non-profits is also included. The system supports the MeF filing platform for all e-filed tax returns for individual, business and specialty returns.

Several enhancements were made to the print manager since the previous release. In addition to the default return types, (Filing, Client and Preparer), users can now create and save custom return types. A new duplex feature was added to help save paper by printing the return on both sides of paper stock. Returns can also be printed to paper, PDF, PaperlessPLUS or PortalSafe with a single click.

Additional changes were made to the client letter functionality inside ATX. All client letters may now be personalized with graphics, personalized text and alteration of variables within the letter.

Program updates are automatically downloaded in the background. New this year is the ability to apply forms and program updates on different schedules. Updates may also be scheduled to be applied at a specific time.

Program help is provided on each screen and numerous self-help videos are provided. Direct access to IRS publications and form instructions are provided as well. A new mobile app, ATX Companion, connects users with multiple ATX

resources. Users are directly connected to industry news, software alerts, the ATX

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

other to mitigate any duplicate data entry. To enhance value, many of these products are bundled together, allowing accounting professionals to build and maintain a full service practice at a modest price.

Many of the ATX tax package bundles include online research provided by the CCH IntelliConnect platform. Users of this service may now enter their specific login credentials directly inside ATX to provide seamless access to the online research options. Subscribers of the CCH IntelliConnect service will also have access to research through Android and Apple powered devices.

Fixed Asset Manager is now fully integrated into ATX. Information is actually shared both ways automatically between the two programs. If assets are added in one program, they are automatically updated in the other.

Paperless Workflow: 4 Stars

ATX allows PDF copies of tax returns to directly integrate into PortalSafe, a cloud-based file sharing system. PortalSafe is a client portal that allows returns to be posted for client review and download. A separate monthly or annual subscription fee for PortalSafe will be required for all noted integration functions.

Notes may be added to any field within ATX for review or as permanent notes that rollover from year to year. ATX currently allows up to three returns to be open simultaneously. This setup is nice for users to view a business return along with any owners to provide optimal tax planning.

A Microsoft Excel or CSV file provided by brokerages containing stock transactions may be directly imported into ATX. Diagnostics are included with the software and errors are checked as data is entered. Warnings are displayed for possible inconsistencies in tax information. Any overrides are presented along with the diagnostics.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

designed by tax and accounting professionals to be a capable yet easy to use solution.

Multiple pricing bundles are provided to help maximize value. Pricing for the comprehensive Total Tax Office bundle, is currently set at \$1,899. A full list of pricing options is available on the ATX product information website.

BEST FIRM FIT

Sole-practitioners and firms with three or fewer staff

STRENGTHS

- Simple forms-based interface and data input screens
- Online tax research options included in many pricing options
- Strong suite integration points

POTENTIAL WEAKNESSES

- No remote access solution currently available
- Review tools are incomplete

2014 Overall Rating: 4 Stars

Income Tax • Software • Taxes

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us