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ATX: 888-455-0183

TaxWise: 888-455-0182

www.atxinc.com

www.taxwise.com

CCH Small Firm Services offers two year-end compliance systems designed for professionals managing multiple employer/payer clients: W-2/1099 and Payroll Compliance Reporting. The applications are both sold under the ATX and TaxWise brand names and work as an integrated part of the ATX and TaxWise suites of professional tax compliance, research, accounting and practice management applications. Both programs offer compliance tools for federal reporting, unlimited electronic filing and data integration with accounting programs, while the Payroll Compliance Reporting system adds state and local compliance with greater forms availability, quarterly reporting of income and unemployment, and additional features. This review focuses primarily on the more comprehensive Payroll Compliance Reporting program.

Basic System Functions

Both programs are add-ons to the user's professional tax package (either ATX or TaxWise) and use the same interface, which should make most users comfortable ... and save time on data entry since clients that already exist in the tax system won't require as much setup time. Work screens and routines also follow the same general processes, with data entered either on form replicas or on interview screens. The system does not provide a screen for multi-recipient data entry, but makes it easy to

move quickly between clients and their individual employees, contractors or other

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accounting professionals. As noted, the system includes quarterly wage, unemployment and hiring compliance capabilities for all states and localities, but is not intended as a live or comprehensive after-the-fact payroll system since it does not include tax tables for the individual states. (State tax tables can be manually entered and managed within the system, if required.) Both the W-2/1099 and Payroll Compliance Reporting systems are updated as needed and made available for download or update disk. Annual program updates are generally available by mid-December. 4.5

Reporting

The more advanced Payroll Compliance Reporting program includes more than 1,800 federal, state and local payroll forms. Forms include W-2, W-3, W-2G, W-2AS, W-2GU, W-2VI, 4852, 1098, 1098C, 1098E, 1098T and all versions of form 1099, along with their state counterparts. The system also automatically prepares forms 940, 941 and 944 and provides electronic filing of forms W-2, W-3, 1099, 1098 and 5498. The W-2/1099 program is more focused on only federal compliance. E-filing to the IRS and SSA is included at no cost, with the program using the federal/state combined filing program. Payroll Compliance Reporting also has the ability to prepare state withholding and unemployment forms. All forms, including recipient copies, can be printed to plain paper or to PDF. Self-sealing forms are not directly available through the system, and the vendor does not offer a service bureau option for handling printing and mailing of recipient forms.

Both the ATX and TaxWise core systems include accounts receivable and invoicing functions, including client letters and other correspondence, along with features for managing mass mailings. Managerial reporting options include wage and withholding details and summaries, recipient lists and other output, with limited customization options but with the ability to save to spreadsheet or PDF format. 4.25

Import/Export Capabilities

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such programs. 4.25

Help/Support

All ATX and TaxWise programs support modern versions of Windows through the latest version, Windows 7. The W-2/1099 and Payroll Compliance Reporting system includes traditional built-in Help functions along with right-click menus, quick access to form instructions, and built-in tutorials and guides. The ATX and TaxWise support websites include downloadable updates, as well as FAQs, a knowledgebase, learning centers and online user forums. Live technical support is included with program pricing. 5

Summary & Pricing

Since the programs are designed with the same general interface as the tax package for which they are designed to compliment, both systems provide an intuitive approach to managing year-end information reporting needs with the benefits of integration with other professional tax and accounting packages. The Payroll Compliance Reporting program is the more comprehensive, providing full support for federal, state, and local quarterly and annual reporting, plus free electronic filing to entities that support it. Pricing for the W-2/1099 system is \$170 per year. The Payroll Compliance Reporting program is \$315.

2010 Overall Rating 4.5

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