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From the August 2008 *Review of*
Document Storage *Programs*

In November of 2006, CCH, a Wolters Kluwer business, announced the formation of the CCH Small Firm Services group. The primary purpose driving this initiative is to have resources dedicated to meeting the unique needs of small firms as a result of their acquisitions of the ATX and TaxWise tax preparation products. These two products continue to be marketed under their own brands as a division of CCH. This provides the best of both worlds by allowing these two solutions to retain their focus on sole practitioners and small firms, while having access to the extensive financial and intellectual resources available at CCH. This review covers the Scan&Fill and Document Manager applications together because of their extended integration. These programs work the same with either the ATX or TaxWise tax preparation product.

Usability — 5 Stars
The key point to understand about these two applications is that they work together to significantly enhance your tax preparation process by automating the scanning process. When you scan 1099s and W-2s, the software will recognize these documents
in 66 different formats. As well, the OCR process converts the form content to XML data that can be transferred to the tax software automatically. The program also automatically creates a folder and files any document that is recognized by the OCR process. The user interface is very intuitive and easy to follow.

Document Organization — 5 Stars
The files are organized into four categories: active clients, non-clients, inactive clients, and "review and assign." The first three categories are

self-explanatory; the review and scan category contains scanned documents that

name. However, the vendor noted that it intends to support listing by last name, first name in a future update.

Integration — 5 Stars

As stated, the strength of this product is the level of integration with the vendor's tax products. You can push the "Lookup Tax Data" button to automatically populate the DMS with the client information. Within the tax software, you can import the XML data from the W-2s and 1099s that was established and reviewed during the scanning process. An option to print to the document manager from within the tax software will create a PDF copy of the tax return and file it in the client's folder. If the client folder has not been set up, it will create the client and sub-folders at that time. Direct integration is provided for e-mailing client documents, including an encryption option for securing interoffice e-mails.

Annotation — 3 Stars

The product has no proprietary annotation tools; therefore, you will rely on the native applications such as Adobe Acrobat and Excel.

Overall Value — 4.5 Stars

If you use either of the ATX or TaxWise tax preparation products, then Scan&Fill with Document Manager is a must-have. The efficiency gains that you can achieve in your tax preparation process are well worth the cost. Even if you use other tax compliance software, the program will automatically file any of the documents that are recognized, saving time and effort in organizing digital files. The product is priced at $305 per year for the document manager and $715 for the Scan&Fill module, which includes the document manager. A network license for up to five users is $1,035. The vendor requires training with the initial

deployment to make sure you get it configured properly. This is provided through

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