CCH Small Firm Services – ATX Scan&Fill & TaxWise Scan&Fill

www.ATXinc.com; www.TaxWise.com

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From the Sept. 2008 Feature on Scan/Fill/Populate Systems

Since the acquisition of ATX and TaxWise by CCH a couple of years ago, the two tax preparation systems, both geared toward small and mid-sized firms, have seen increased development, thanks to the considerable resources that CCH has to offer. One of the more notable developments over this time is the Scan&Fill module, offered under each of the tax systems' names. The module, which includes a basic Document Manager system, provides direct scanning using most scanners (sheet-fed is preferable), with optical character recognition (OCR) extracting client data from W-2s and most versions of 1099.

Operating separately from the tax system (either ATX or TaxWise), Scan&Fill automatically creates a temporary client folder that stores documents that have been scanned, with items sorted by document type. Each of these documents is saved as an individual image file (*.jpeg), while the system's Review function provides a panel that displays the data that has been extracted from an individual form and allows editing as necessary.

Scan&Fill's AutoFile feature automatically files recognized documents in the client's folder or the program will automatically create a new client folder and file the document if the client is not yet in the system. After the user has verified the accuracy of the data in the scanned form, the next step is to move the temporary folder into the Active Client Directory, which is part of the document management features of the program and provides separate folders for source documents and the client tax return. Individual folders for spouses filing jointly can be linked so that when the user chooses to populate the return, data from both are included. After these review and folder management tasks, the process of transferring client data is performed by exporting the data into a file that is then imported by the ATX or TaxWise preparation system.

While preparing a tax return, users can access scanned source documents and, when the return is completed it can be stored as a PDF with the client's documents in the document management module. The Document Manager also enables
storing of other digital files and documents related to a client engagement, such as signature pages, receipts and notes. It also provides basic search functionality.

Although its form recognition and workpaper management capabilities are less comprehensive than many of the other auto-population systems designed for larger practices, Scan&Fill's feature set is well suited to smaller and mid-sized practices using TaxWise and ATX and who are looking for a paperless solution that also provides time savings by automating much of the data entry associated with 1040 tax preparation services. The system costs $715 for a single-user license, $1,035 for up to five users.

Forms Supported for Automatic Population of a Tax Return and AutoFile to the Client Folder: W-2, 1099 (most versions)
Additional Forms Recognized for AutoFile to the Client Folder:
K-1, 8879

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