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CCH Small Firm Services — TaxWise Client Write-Up & ATX Client Write-Up

800-755-9473 (TW); www.taxwise.com 877-728-9776 (ATX); www.atxinc.com

Dec. 01, 2008

From the Nov. 2007 [Review of Client Write-Up Systems](#)

After CCH's acquisition last year of the TaxWise and ATX tax systems, the parent company moved the two professional preparation packages into a new division, CCH Small Firm Services. Of course, both TaxWise and ATX offered more than just income tax preparation, with options also available for 1099 and wage reporting, sales tax compliance and other client services. Both companies had also offered client write-up packages through partnerships with third parties. Now under the same umbrella, CCH Small Firm Services took the CPA Client Write-Up system that CCH acquired from Sage Software a few years ago, and "revitalized, updated and improved it," making it available in separate versions that can integrate with the two software packages.

The write-up system, which includes traditional general ledger and journal entry functionality, also provides after-the-fact payroll, account reconciliation, AP, AR and customizable financial statement reporting capabilities. An optional live payroll package can also be added to the write-up, providing a fully integrated payroll service option that includes wage compliance reporting and direct deposit. Both the TaxWise and ATX versions of the write-up system have a first-year cost

of \$395, with \$159 renewals. The suite package that includes write-up and payroll costs \$795, with \$359 renewals (and includes all payroll table updates).

LEARNING CURVE & EASE OF USE — 4.5 Stars

Once again, both write-up systems are the same except that each bridges data to the professional's tax system, either ATX or TaxWise. The system opens into a Spartan interface that is intuitive and aesthetically appealing, providing access to various system components via pull-down menus and tabbed workscreens. The system accommodates heads-down users, with fast data entry for recurring monthly journal entries and checks. Primary areas of the write-up suite are available from separate program icons, allowing users to work in more than one function at a time, including the core write-up system, as well as AP, AR, client lists and payroll activities. Data-entry screens are user-friendly, with two options for entering checks: the check register or a check entry screen. The system can remember prior transactions and accounts, allowing users to automatically have appropriate distributions on ensuing checks.

Both the ATX and TaxWise versions of the program have strong built-in ATF payroll capabilities, while optional full-service payroll features are available with support for MICR printing, e-filing of compliance returns and state forms, as well as direct deposit. Alternatively, professionals can use the online automated system from PayCycle, with data feeding back into GL accounts. A Computer Checkbook program is also available, helping clients maintain more accurate account data, and providing direct integration of data to the write-up program.

REPORTING & FINANCIAL STATEMENTS — 4 Stars

Whether the professional is using TaxWise or ATX for their tax preparation, the write-up system provides strong reporting features that are easily accessible from appropriate menus, and provide good editing and formatting options. Financial statements are also fully customizable, and the program offers templates for all GAAP-required statements. After-the-fact and live payroll reports are automatically maintained by the system as data is entered into the check register, providing instant access to employee and vendor statistics. Preparation of W-2s and 1099s is pretty much automatic, with data flowing to the appropriate forms.

INTEGRATION, IMPORT/EXPORT — 4.5 Stars

The TaxWise and ATX client write-up systems allow for import directly from QuickBooks

or Peachtree, or professionals can provide clients with “computer checkbooks” that are used to track basic account data with information easily synched into the program. It also has two-way integration to reflect reconciliation adjustments. The write-up systems are specifically tailored to each of the tax programs, enabling users to easily export year-end balances to TaxWise or ATX tax returns.

SUPPORT, TRAINING & HELP SYSTEM — 4.5 Stars

The programs utilize a traditional built-in Help utility with some right-click functionality and context-sensitive guidance, along with an indexed primary Help system. Both vendors offer live phone-in support, user guides and other assistance on their respective support websites, and both have various CPE-eligible live and web-based training options.

RELATIVE VALUE — 4 Stars

The TaxWise and ATX systems are great additions to small firms looking to either add write-up and payroll as new services, or who simply want to change from a program that doesn't offer the same level of direct integration with their tax program. The write-up program has an attractive price with good financial reporting options, which should make it an easy fit for firms using either the TaxWise or ATX preparation system.

2007 Overall Rating: 4.5 Stars

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