Dec. 01, 2008

From the April/May 2007 Review of Professional Tax Preparation Systems

ATX/Kleinrock was acquired last year by CCH, the developer of the high-end ProSystem line of tax, accounting and engagement products. The company also acquired TaxWise, and has pledged to continue to develop these two tax systems, placing them into a new small practice-focused business unit that essentially gives CCH offerings across the spectrum of accounting and tax practice sizes. One of the reasons CCH was attracted to the ATX line was its rapid success at building a very large user base devoted to the program's exceptional ease-of-use, comprehensive capabilities and low sticker price. ATX/Kleinrock offerings include compliance software for all major entities, which are available individually or in bundles. The system reviewed here is the ATX MAX bundle, which allows unlimited preparation of federal and state compliance for all entities, with included e-filing for all supported forms, along with sales and use tax compliance, W-2/1099 preparation and reporting, and support for up to three users. The MAX bundle costs $1,065. MAX also incorporates Kleinrock's 1040 as context-sensitive Help and includes a copy of the CCH 1040 Express Answers. Other bundles are available that integrate additional Kleinrock tax research materials.

Learning Curve — 5 Stars
The ATX MAX system opens to a client return list called the Return Manager, which provides a searchable and sortable spreadsheet with various client data in columns and includes tabs for viewing AR or the Tax Warehouse, which lets the preparer or manager access return summaries without wading through client forms. Additional tabs across the top of the screen also provide access to the other primary features of the program, including Rollover Manager, Preparer Manager, E-Service Manager and Bank Manager. After either creating a new client

return or opening one from the Return Manager, the preparer has the option of

allows overriding of fields. It also allows users to mark as estimates, add other notes, highlight overrides and edits for easy review, and identify them during the system’s Error Check process. Subsidiary forms and schedules (W-2, 1099, K-1, etc.) can be accessed using tabs across the top of the window while working within a client return, and other features, including a checklist, summary and shortcuts to jump directly to return sections contribute to the system’s exceptional ease-of-use. MAX’s business-oriented features also provide friendly features, which makes the basic AR and RAL functions simple to use, while providing decent functions such as client aging reports, multiple billing rates and client correspondence templates.

Use/Workflow & Productivity Tools — 4 Stars
The general workflow process of the MAX system is straightforward, with the central hub being the Return Manager and its client list, providing access to all client returns along with summary client information that can be viewed using the Easy View feature. This allows users working within a client return to retrieve basic data from another return without closing out of the current one.

The program includes diagnostics and error-checking functions in addition to a checklist to help guide practitioners through traditional return preparation, but it does not include a formal review process. MAX allows preparers or managers to drill down to associated forms, schedules and worksheets, and users can also create links between fields and documents or add comments as needed, including noting of field entries as estimates. Miscellaneous text statements can also be added to returns without them linking to specific forms or fields. Whether using the Interview or Form data-entry method, the system offers excellent support throughout the return preparation process, including receivables management, client letter and invoice templates, and various tutorials. Online client organizers are available, allowing for the automatic transfer of client data into the tax

a preference option that will prevent the printing of SSNs. For paperless processes, MAX allows generation of returns and other documents into PDF format.

Integration/Import & Export — 3.5 Stars
MAX shares data throughout the system as needed for various entity types, including K-1 data and parent/child returns. The system enables users to import data from QuickBooks and Peachtree into both individual and business returns, and supports import of Excel-formatted spreadsheets. Integrated tax research is available in some of the ATX tax preparation packages.

Support/Training & Help System — 4.5 Stars
MAX includes line-by-line instructions accessible either through the Interview or Form-based data-entry mode, as well as content-specific Help, tutorials, FAQs, an online support center, web-based training options, and the ATXers web-based
community of tax professionals where users interact and assist each other with tax treatments. The program is exceptionally easy to use, but toll-free tech support is available if needed.

Relative Value — 5 Stars
As with other tax preparation systems geared toward smaller practices, pricing for ATX has decreased significantly over the past few years, while the quality of the program has increased. The MAX system is an outstanding bargain for a smaller tax practice with clients whose compliance needs are generally not too complex. The program includes support for up to three preparers included in the base price, and provides a strong feature set that includes compliance for all primary entities with federal and state e-filing included, as well as W-2/1099 and sales and use tax compliance. With form and interview data-entry methods, the system should require little training or time for users to become proficient.

2007 Overall Rating — 4.5 Stars