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Technology

www.tax.cchgroup.com

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From the July 2009 Feature Article on [Tax Document Automation](#)

CCH's ProSystem *fx* Scan provides an integrated scanning system for 1040 source documents, helping to streamline the process of collecting, organizing and managing engagement workpapers. The AutoFlow feature included in Scan uses optical character recognition (OCR) to identify common 1040 source documents like W-2s, 1009s, K-1s, etc., and then extracts key data from each form's fields.

The tax document automation system provides a data verification feature for preparer staff to quickly look over summary client information to ensure accuracy. Data can then be imported directly into ProSystem *fx* Tax. The system also creates an organized and bookmarked PDF file, decreasing administrative management of client files.

As an optional add-on to ProSystem *fx* Scan, PDFlyer works with Adobe Acrobat to provide additional PDF capabilities when working with scanned source documents. Resulting client workpapers help provide a standardized workflow process, are fully paperless and are easily accessible to authorized staff within a firm.

ProSystem *fx* Scan won an [Innovation Award](#) in 2006 (the product formerly named BOCDIP). The system is installed locally on a firm's computers or servers, alongside ProSystem *fx* Tax.

Forms Identified:

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