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Jul. 01, 2009

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

CCH runs ATX and TaxWise through its Small Firm Services division, providing smaller practices with professional compliance and management technologies. The Scan&Fill system is offered as an add-on module for users of the ATX and TaxWise systems, providing automated tax information extraction and document management.

The core features of Scan&Fill lie in its integration with the tax programs, which allows users to simply scan W-2s and 1099s, with the data presented for review and then directly import into a client's return. With the addition of the vendor's forms recognition tool, nearly all formats of W-2s or 1099s are recognized.

The program includes a document storage system that, during the scanning process, automatically creates and names the digital client folders to house PDF versions of the scanned documents and client returns, provides centralized storage, and allows quick access to printing functions.

By identifying taxpayer names and SSNs, Scan& Fill also identifies whether a client already exists within the tax system. If so, the documents are routed into the appropriate folders. If not, the program initiates new client setup functions. The system is an add-on module installed along with the user's version of TaxWise or ATX.

Forms Identified: W-2s, 1099s, 8879

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