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CCH a Wolters Kluwer business — ProSystem fx Scan

2012 OVERALL RATING ★★★★★

★★★★★ CORE PRODUCT FUNCTIONS/FEATURES

★★★★★ PAPERLESS WORKFLOW

★★★★★ INTEGRATION

★★★★★ HELP/SUPPORT/TRAINING

800-739-9998

CCHGroup.com

2012 Overall Rating 4.75

Best Firm Fit

Firms using other ProSystem *fx* applications to prepare individual income tax returns, as well as firms that want the OCR and organizing processes to run on premise with a fast turnaround time.

Strengths

- With the right hardware and recommended scanning procedures, the OCR processing should only take a few minutes, making it ideal for firms that want to scan and begin preparing a tax return immediately.

- Autoflow Wizard is an easy validation process for users to follow and is

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- The up-front investment in the scanning software and hardware may make it cost prohibitive for firms that prepare a very small volume of individual income tax returns. Firms should also consider that Autoflow is additionally priced at \$12/return.

Summary & Pricing

Originally developed by a CPA firm in 2004, ProSystem *fx* Scan is the tax document automation component of the ProSystem *fx* Suite of products from CCH, an integrated set of applications for accounting firms. It is one of only two products covered in this review that offers a version that can be installed on a firm's local computer or server, unlike other products where tax documents are uploaded to the vendor's site for OCR processing. While this may significantly decrease the processing time, it may also require a firm to purchase additional hardware to process large volumes of documents in-house.

ProSystem *fx* Scan launched a web-based solution in December 2011. The SaaS version has a 24-hour service level agreement for returning organized tax documents, but the average turnaround time is expected to be two hours for the upcoming tax season. This review focuses on the version that is installed locally on a firm's servers.

Pricing for the ProSystem *fx* Scan application varies, with a starting price around \$4,200. The Autoflow component is priced at \$12 per return. The SaaS version is sold in bundled quantities.

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