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DOCUMENT MANAGEMENT

CCH Small Firm Services — ATX and TaxWise Scan&Fill

Aug. 22, 2012

4279 characters

800-375-9542

www.ATXinc.com

www.TaxWise.com

As the name implies, ATX and TaxWise Scan&Fill is a scanning and document storage system that is designed as an integral extension of the ATX and TaxWise tax prep software.

Core Functionality

The interface is simple in its design. An intuitive toolbar of functions is displayed along the top of the screen, and the document folder list is displayed along the left side. Scan&Fill uses a traditional Windows Explorer folder model. You can configure a default folder structure template to apply to each client, and then you can add client-specific folders as needed. Within a folder, documents are catalogued by user-defined document categories. A PDF print driver is provided to generate and store reports and documents directly to the document storage application. 4.5

Integration

The deepest integration is with the ATX or TaxWise software. You can print returns from the tax application, and Scan&Fill will label and store them to the appropriate client and folder. If the folder doesn't exist, it will be automatically created. Returns can also be printed in bulk to create individual client files. Integration with the fixed assets manager and client write-up solution is provided, and it will also create the appropriate folders to store documents from these applications as necessary.

You have the option to print using the program's print driver and store e-mails or they can be saved in their native format. Outbound e-mail functionality is particularly strong. You can select multiple files to e-mail and automatically encrypt them with the last four digits of the social security number or tax ID number for the password. Alternatively, you can establish a user-defined password. An integrated scan button will scan to a PDF format, as well as some alternative file formats. TWAIN-compliant scanners are supported, and a list of supported scanners is posted on the vendor's website. 4.75

Advanced Functionality

You can search for documents by any part of the client name or taxpayer ID. You can also associate spouses to a taxpayer (client) so that the source documents can be exported jointly to a Married Filing Joint tax return. The system separates "active" and "inactive" clients so you can keep your current workspace devoted to active engagements. You can also have non-client directories to store other types of files, including your firm's personal files and folders.

The most advanced feature is the Scan&Fill OCR (optical character recognition) technology used to extract data from source tax documents to create client folders if they do not exist or file documents to existing client folders and then pass the data directly through to the tax software. This eliminates a lot of typing. Scanned W2s and 1099s are displayed on-screen for review and edits before exporting into the ATX or TaxWise tax software.

Additional features include a digital signature pad (available through third-party) to allow clients to sign returns and documents electronically while they are in your office. An audit report tracks all activity in the system, which you can sort and filter by client, date/time and user. A built-in backup tool can be used to back up now or schedule an automated backup process. 4.25

Summary & Pricing

The Scan&Fill functionality sets the product apart from the other products reviewed. It takes the document storage concept to the next level. Obviously, if you are using the vendor's tax preparation software, you will have the advantage of automatic labeling and filing of exported tax returns and reports and import of tax source documents into the tax return.

However, the Scan&Fill product is not only tied to the ATX and TaxWise products. Users of other tax preparation products can easily print documents to Scan&Fill, and the program will open a dialogue box asking the user where to store and what to label the document. And the pricing is very affordable, starting at \$450 for the document storage application or \$760 with the integrated scan and fill feature. This increases to \$1,090 for a five-user system. Small Firm Services requires attendance in a \$99 training course to make sure you start off on the right foot.

2010 Overall Rating 4.5

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