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Best Fit: Firms wanting to integrate automated workpaper and form preparation into the larger suite of tax and practice management programs in the ProSystem *fx* Suite.

Strengths

- Optical character recognition (OCR) is streamlined and fast
- The AutoFlow Wizard feature helps provide data validation
- User customization options
- Side-by-side views of forms and source documents during review
- Options for annotating, managing bookmarks and repaginating PDF documents

Potential Limitations

- Scan and organize functions work with any tax software, but AutoFlow Wizard only imports data into ProSystem *fx* Tax.
- Best suited to firms with larger volumes of individual returns

ProSystem *fx* Scan offers tax document automation and can be used as a stand-alone system or as an integral part of CCH's ProSystem *fx* Suite, which includes applications for tax planning, compliance and preparation, practice management, document management, client collaboration and other services public accountants provide clients. The system is available as an installed program that is located on an office server or computer, with all data remaining at the firm, and also available as a web-based solution. The SaaS version includes 24-hour turnaround for organized tax documents, with average turnaround time of about two hours.

Core Product Functions/Features: 4.75 Stars

ProSystem *fx* Scan has two separate principal functions. The Scan function uses

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Tax.

A useful add-on utility is PDFlyer, an Adobe Acrobat plug-in that lets users annotate, markup, and review the bookmarked PDF documents created by Scan. PDFlyer also includes the ability to merge and append PDFs, a useful feature when additional documents come in late. It also has a convenient 10-key calculator that enables users to quickly and easily add calculator tape to PDF workpapers.

Paperless Workflow: 4.5 Stars

When using ProSystem *fx* Tax, after scanning documents, the AutoFlow Wizard identifies SSN/TIN numbers on the source documents and matches them up with existing client data files in the tax preparation program. The user then selects a tax return and the AutoFlow Wizard compares the scanned tax documents with the information entered for the client in the prior year, and attempts to flow the data to the correct form for tax documents that may apply to various forms of a tax return (such as 1099-MISC or a 1098).

Users can either validate the data at this point, or have the data immediately populate the tax return, to be reviewed later for data accuracy. When using the built-in data validation function, the system provides a screen that shows the source document at the bottom and at the top, a pane with the field name, the electronic value of extracted text, and an image of the extracted text. This convenient layout helps in reviewing the accuracy of the OCR since it shows these fields side by side instead of in separate windows. The validation screen also highlights certain amounts in different colors to show the data that was imported to the tax software and bring potential errors to the user's attention. Users can adjust the layout of the validation screen to have forms appear on a separate monitor, easing the review process.

A diagnostics spreadsheet is included in the organized PDF created by the program,

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Office. Importing the data using the AutoFlow wizard is licensed on a per-return basis at a list price of \$12 per return. For firms using ProSystem *fx* Document, Scan publishes the PDFs it generates to Document folders.

Help/Support/Training: 4.5 Stars

The program includes a comprehensive user guide, along with implementation documentation that is helpful in getting the hardware and software configured. CCH offers web-based and on-site user training, and its consulting group can assist firms with implementation. Online help options include the CCH Support Knowledgebase, documentation, news, online chat and phone support.

Summary & Pricing

Available in both installed and SaaS versions, ProSystem *fx* Scan provides a more user-controlled document automation system, with highly accurate OCR, strong data validation and PDF annotation, bookmarking and pagination options. 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.

2013 Overall Rating: 4.5 Stars

Technology

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