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**PRODUCT & SERVICE GUIDE**

# CCH, a Wolters Kluwer business — ProSystem fx Scan

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## CCH, a Wolters Kluwer business — ProSystem fx Scan

**2011 OVERALL RATING** ★★★★★



**CORE PRODUCT FUNCTIONS/FEATURES**



**PAPERLESS WORKFLOW**



**INTEGRATION**



**HELP/SUPPORT/TRAINING**

## 2011 Overall Rating 4.5

### Best Fit

- Firms who want to control all aspects of the tax document automation process
- Organizations who use other ProSystem *fx* applications in their individual tax preparation process
- Firms who process more than 300 individual tax returns using ProSystem *fx* Tax

### Strengths

- One of two products in this review where none of the data is processed outside the firm's data center
- CCH's proprietary PDFlyer add-in for Adobe Acrobat supports bookmarking & repagination of scanned forms

### Potential Limitations

- While Scan can be used to organize documents for use with any tax software, the Autoflow wizard only supports importing of extracted forms data into ProSystem *fx* Tax
- Importing data using the Autoflow wizard requires the use of processing units, which have a current list price of \$12 per tax return
- Investment in hardware and software to initially deploy this application may not make sense for firms who process fewer than 300 returns

### Executive Summary & Pricing

ProSystem *fx* Scan is the tax document automation tool for the popular CCH ProSystem *fx* suite of applications. Scan is different from most of the competing products because it is one of only two products reviewed here, which is installed locally on a firm's servers. Scan does not require information to be sent to a secure data center for batch-based processing. However, the firm may need to invest in additional hardware to support processing large volumes of documents. The ProSystem *fx* Scan application is priced at \$\_\_\_\_, and the Autoflow (OCR/import) feature has a list price of \$12 per return processed.

## **Core Product Functions/Features – 4**

### **Paperless Workflow- 5**

### **Integration – 4.5**

### **Help/Support/Training – 4**

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