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CCH Small Firm Services is the technology company behind the ATX and TaxWise professional tax compliance suites, which are popular with small and mid-sized practices. Under each of these brands, the vendor also offers collections of professional accounting and client service applications, including trial balance, write-up, asset management, client bookkeeping, and separate program modules designed for various areas of wage reporting, payroll processing and compliance. The ATX Payroll and TaxWise Payroll systems are designed to work as either stand-alone programs or combined with each brand's write-up program, and both generally offer the same functionality and pricing. For this review, these two payroll systems fit into our "Practitioner/Multiple Employer" category, which means they are designed specifically for professional accountants who manage payroll functions for many of their small business clients, and the firm directly handles all wage and compliance reporting, recipient copies, EFT functions and payments.

BASIC SYSTEM FUNCTIONS

The ATX and TaxWise programs are designed for tax professionals and can be used as stand-alone programs. They are distinctly separate systems from their sibling tax programs, opening into an interface that provides traditional pull-down menus for accessing key functions, with the work area defaulting to the previously used client. It also offers client and employee selection lists and management functions, and a Quick Looks menu provides access to key summaries and a gross-up calculator.

During initial setup of employer entities, the system guides users through most

Both the ATX Payroll and TaxWise Payroll systems can be networked and used simultaneously by multiple professionals in the same office, with the program allowing only one user in a specific client file at any time. The systems can handle any number of client employers and employees, with multi-client management functions that offer some overview capabilities. However, since they do not offer extensive automation functions for approvals and due date management, the programs are best suited to practices managing a few dozen client payrolls with generally small employee bases. Pricing is fixed, but since the payroll and compliance functions are modular, firms can purchase the particular areas of the system they need in order to service their clients.

With the inclusion of the optional Payroll Compliance Reporting program, which integrates with the payroll systems, the programs include all federal and state tax tables, along with many local forms. However, some local jurisdictions, especially those requiring coupons or added documentation, need to be manually prepared. The systems include support for multi-state taxed employees. Direct deposit is included, with the ability to disperse funds into up to four employee accounts. ATX Payroll and TaxWise Payroll include multi-employee data entry and edit screens, but the systems do not offer batch processing of multiple payrolls across multiple client employers. 4

REPORTING & MONITORING

As previously noted, most of the reporting and compliance tools for the ATX Payroll and TaxWise Payroll systems are offered through separate modules. The Payroll Compliance Reporting add-on includes more than 1,000 state quarterly, annual and unemployment forms for all states, and includes tools for electronically filing federal wage reports, new hire reports and recipient forms, including W-2, W-3, 1099, 1098 and 5498. Electronic payment options are not available, nor is there an option to e-

file reporting to states and localities. The module provides SSA AccuWage

available within the system, and reports can be output into Excel and Word formats for full customization and data presentation. Reports can also be output to PDF. 4

INTEGRATION/IMPORT & EXPORT

ATX Payroll and TaxWise Payroll integrate with the compliance and W-2/1099 systems from CCH Small Firm Services, as well as with Client Write-Up, which can be bundled with the respective payroll system, offering automated posting to GL, after-the-fact payroll reporting, financial statement generation and functions for managing AR. The system also offers import from QuickBooks and Peachtree and can generate reports into Excel format, allowing import into these and most other accounting programs. Reports can also be emailed directly from within the program. Timesheet management functions are limited, as the system is not designed for time management, billing or attendance functions. Employee time data can be imported from most time clock systems. 4

HELP/SUPPORT

ATX Payroll and TaxWise Payroll offer basic in-program Help indexes and form instructions, along with links to the ATX and TaxWise support websites. These support websites include extensive resources such as user forums, FAQs, manuals, tips and video tutorials, but most of the support and training options on the support websites are geared toward the vendor's income tax compliance programs. Program and rate table updates are also downloadable from the respective websites, and the programs can be set to automatically check for available updates. Web, e-mail and live phone-based support are included in pricing. 4.75

CLIENT SELF-SERVICE FEATURES

ATX Payroll and TaxWise Payroll do not offer online features, and therefore, do not

of users in the same office, while the compliance reporting module is an additional $315. The Payroll and Write-Up systems can be bundled for $945.

2010 Overall Rating 4.25

Payroll • Technology