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REVIEWS

2016 Review of Wolters Kluwer – ATX

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Isaac M. O'Bannon • Apr. 23, 2016

The image shows the logo for ATX, consisting of the letters 'A', 'T', and 'X' in a bold, blue, sans-serif font. The 'A' is on the left, the 'T' is in the middle, and the 'X' is on the right. To the right of the 'X' is a smaller 'TM' trademark symbol.

From the [2016 Reviews of Professional Tax Preparation Systems](#).

Best Firm Fit: ATX is best-suited to small firms and sole practitioners with individual and business tax clients who may and those serving the other business needs of those clients.

Strengths

- Affordable all-inclusive bundles include a suit of options for research, accounting, payroll, sales & use tax, and practice management, plus sales tax reporting.
- Easy to use interface doesn't require in-depth tax knowledge, while data entry still follows traditional form workflow
- Includes unlimited e-filing with options for all federal and state taxed entities, plus gift, estate, nonprofit and pension returns, and Ohio cities
- A multi-office manager function offers managerial oversight

Potential Limitations

- No native remote access capabilities or apps
- Not as adept at complex returns requiring multi-preparer involvement

The ATX family of professional tax and accounting programs is part of Wolters Kluwer CCH Small Firm Services, and is geared primarily toward small firms looking for a system that simplifies the preparation process, making it easy to get new and seasonal staffers up and running with the program. CCH Small Firm Services also offers the TaxWise professional tax system, which is designed for higher-volume tax offices, as well as a collection of tax and accounting related solutions for research, document management, client accounting, payroll, wage reporting, trial balance and practice management.

New in this most recent tax year, ATX extended its integration with the CCH iFirm practice management system and research solutions, and expanded capabilities for preparing complex returns. The company also added the ATX Advantage bundle, which includes the ATX Total Tax Office software solution to include extensive compliance research and learning, practice management, special customer support and more.

Core Product Functions/Features: 4.75 Stars

With the ATX system, ease-of-use is a core feature, with data entry occurring on tax form replicas, and data automatically calculated and flowing to all related areas of the return, including schedules and worksheets. The system also includes line-by-line access to help and IRS form instructions.

ATX gives users the ability to open and work with up to three client returns at the same time, which lets users easily answer quick questions or enter form data, then

return to the primary task at hand. The system supports multiple users within a practice, with the program either installed on individual desktops or on the firm's server, with security logins and features to prevent users from overwriting each other on returns.

The Preparer Notes feature in ATX lets users add custom notes to any field in a return, as well as marking them for review or making notes stay with the return through the next year. From the Return Manager, users can sort, filter and search client returns by more than 70 fields, and users can quickly move between an overview and a more detailed, client-centric view. An analytic feature can detect e-filing errors, missing data, calculation overrides and addition errors.

Paperless Workflow: 4.5 Stars

Several tools are available for workflow and collaboration within the office and with clients. The PaperlessPlus utility provides encrypted document management functions, offering storage for tax returns, client documents, email, letters, reports, PDFs and even scanned images. Users can securely send these stored documents using the PortalSafe file sharing solution. The system also supports electronic signatures for PDFs using signature pads.

The Central Office Manager feature offers multi-office management using cloud collaboration tools, with firm managers having oversight into all firm and client return activity, as well as productivity, billing and document management.

Remote Capabilities: 4.25 Stars

A client portal system is available, through CCH iFirm, for firms using ATX, allowing preparers and clients to share, store and track tax and related documents in a secure, online environment. The client portal can be linked to the firm's website, with the portal having the same branding elements and style as the firm website.

The ATX system is designed to be used on workstation computers or installed on a firm's servers, and is not natively accessible remotely or via any apps. Some individual firms have, however, made their server version accessible via terminal services like Citrix or via third-party application service and cloud-hosting service providers.

Integration Options: 4.5 Stars

In addition to the document management and collaboration features available in PaperlessPlus and PortalSafe, ATX users can add a variety of accounting and research tools into their practice, with integration with client data from the tax system, where appropriate. The Client Accounting Suite offers small business accounting features complete with GL, AP, AR, financial statements and trial balance, with the directly exportable into the client's tax return.

Other add-ons, which can be bundled with the tax program, include payroll, W-2 and 1099 preparation, and payroll compliance reporting. Through the CCH iFirm offering, which also integrates with ATX, users can also benefit from trial balance, a practice management system, client portals and a system designed for managing seasonal practices. Unlimited e-filing is included with the program, and various bank product options are available. Schedule D transactions can be imported common brokerage statement formats.

Help/Support – 4.5 Stars

ATX includes a traditional built-in help utility with line-specific help and access to instructions and the online support center, which includes an online community, webinars, FAQs, news, blogs, IRS Quick Alerts, a knowledge library and other resources. Phone and web-based support is included with system pricing.

Summary & Pricing

ATX offers a comprehensive small practice tax solution that includes support for all forms, plus has options for accounting, payroll and other professional products. Several bundles are available starting as low as \$639 for the 1040 package. Pricing for a 3-user ATX Max package, with unlimited e-filing and support for all returns, plus research, payroll compliance and other features, costs \$1,459. Per return pricing options are also available.

2016 Overall Rating: 4.5 Stars

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