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Advanced Workflow and Traditional Workflow. In general, smaller firms would be best served using a "traditional workflow" system, which are designed for more typical ...

Isaac M. O'Bannon • Apr. 23, 2016

Tax professionals face a unique challenge not faced by any other profession. Each year, a handful of people who know less about taxes get together to decide on whether to totally rewrite the rules on how tax professionals do their jobs. Yes, we're talking about Congress and the president. This year, however, instead of adding a few thousand pages of tax code, creating new taxes for millions of Americans, or adding a few band-aids to the system, they actually applied a little common sense.

Regardless of your personal and professional feelings toward the IRS and the tax code, most income tax professionals probably gave a little sigh of relief when Congress passed the PATH Act (Protecting Americans from Tax Hikes). That's because, again regardless of what you think of the name of the law, or the job performance of either Congress or the president, the PATH Act finally made more than 20 "tax extenders" permanent, instead of just slapping on temporary one year extensions to these tax credits and deductions. (Read more about what the PATH Act did at www.cpapracticeadvisor.com/12151947.)

All of these changes aside, tax professionals simply can't know every detail of the U.S. Tax Code, so they rely on tax compliance systems that offer not only the tools and resources to prepare hundreds or more returns for their clients, but also have research options that help them stay on top of these tax changes.

2016 Reviews of Professional Tax Compliance Systems

Advanced Workflow Systems

[Intuit – Lacerte Tax](#)

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typical workflow processes. The “advanced workflow” systems are generally for firms with more complex workflow processes, such as the need for several tax specialists or departments to work on a single complex return, firms with multiple locations, or those with clients who have inter-related or multi-tiered partnerships.

Traditional Workflow Systems

[CCH SFS – ATX](#)

[CCH SFS – TaxWise](#)

[Drake Software – Drake Tax](#)

[Intuit ProSeries Tax](#)

[Intuit Tax Online](#)

[TaxAct Professional](#)

Related Products:

[BNA Form 706 Preparer & Form 709 Preparer](#)

Follow the links above to see how each professional tax system fared in this year's review.

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