Mary Girsch-Bock • Aug. 18, 2017

ATX Tax

Wolters Kluwer Small Firm Services

ATX from Wolters Kluwer Tax & Accounting is well suited for smaller firms and sole practitioners that process non-complicated tax returns for individuals and clients. ATX also offers both tax law research and practice management integration to create a comprehensive, fully integrated suite of tax and accounting applications.

From the 2017 Review of Professional Tax Preparation Systems.

Designed to be installed on a local workstation or server, ATX does not offer remote access, though third-party hosting options are available for firms that desire the ability to access the product from remote locations.

Available in five different packages, ATX offers Pay-Per-Return, 1040, MAX, Total Tax

The latest version of ATX offers enhanced security including more stringent requirements for passwords. The product also features enhanced integration with CCH iFirm, and new electronic filing packages have been added for eight states.

ATX supports over 7,000 compliance forms, including 1040, 1040 NR, 1041, 1120, 1120s, and 1065 as well as specialty forms such as 706, 709, 990, and 5500, including federal, state, and local forms. The program also supports sales and use tax returns as well. Users can e-file returns directly from the data entry screen with ATX able to e-file both federal and state 1040, federal 1120, 1120s, 1065, 1041, 990, and 5500, as well as numerous state returns where applicable.

Integration with PortalSafe from eFileCabinet allows users to securely share confidential documents with clients and co-workers. All files are completely encrypted for security, and users control client access to any documents available on the portal, and users are notified via email when a document has been accessed or uploaded by a client. PortalSafe also allows uses to print PDF files from ATX directly into PortalSafe.

PaperlessPlus offers encrypted document management capability, so users can easily store tax returns, letters, reports, emails, PDFs, and images, along with any scanned documents. Rapidly store tax returns from ATX or TaxWise along with emails, letters, reports, PDFs, images, photos, and any scanned documents. Integration with PortalSafe, mentioned earlier, allows users to securely share documents with clients, or users can send password protected documents to clients via email. Electronic signature capability for PDFs is also available in ATX.

The Central Office Manager offers firm administrators the ability to quickly simplify multiple office setup; managing all locations from a single website. Users can manage details like pricing and programs for each office with default templates available in

the system. Emails, software updates and other new data can also be managed from a

access to the most recent version of any form accessed.

ATX offers users traditional help functionality, with line-specific help options available throughout. Access for form instructions are also available from form data entry screens. An online support center is also available; providing access to various tools and resources including an online community of users, as well as access to product webinars, FAQ's, blogs, and knowledge library and access to product updates. ATX offers both telephone and web support, with support pricing including the cost of the subscription.

ATX offers a solid tax compliance solution, and offers excellent access to a variety of tax research applications. ATX is available in five editions; ATX Pay-Per-Return, which is $529, 1040 Package, which is $669, MAX Package, which is $1,579, Total Tax Office, which is $2,289, and Advantage, which is $3,759, with the MAX, Total Tax Office, and Advantage options also offering unlimited e-filing, payroll tax compliance and tax research.

2017 Rating: 4.5 Stars