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Mary Girsch-Bock • Aug. 18, 2017



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management, document management and time entry functions.

CCH Axcess Tax offers an intuitive user interface that resembles Microsoft Office, making it easy for new users to feel comfortable using the program. The Dashboard interface offers easy customization capability, offering access to all client information, email, along with calendar items and notifications, and can be customized to suit user needs, while also working to expedite the data entry process. The product also offers the ability to create batch sets for all prepared returns. The addition of tax organizers offers more flexible data entry options, including the ability to guide users through the process of entering tax information.

CCH Axcess Tax offers the ability to prepare all major U.S. tax returns, including federal, state, and where relevant, many local/municipal returns. CCH Axcess Tax supports 1040, 1041, 1065, 1120, 1120S, 706, 709 and 5500 returns, along with any related state tax forms as required. Users can process prior-year returns, and can easily roll forward prior year information as desired.

CCH Axcess Tax offers electronic filing for supported forms including all states that accept electronic returns. The program also provides users with the status of each e-filed form.

CCH Axcess Portal provides firms with the ability to share source documents and statements, while also providing clients with on-demand access to financial data and relevant files. Teach Portal is password protected for additional security, and once a client is set up in the system, they are free to handle their own login and password information. All types of documents can be shared via CCH Axcess Portal, including Microsoft Word and Excel files, PDF's and even QuickBooks files. The CCH eSign system offers the capability to sign documents including tax returns, engagement letters and other documents electronically.

Paperless workflow options are robust in CCH Axcess Tax when using it in

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decreasing the amount of paper generated, the amount of data entry necessary, and the ease in which documents are shared with colleagues and clients. This seamless integration includes the CCH Axcess Portal, mentioned earlier, that provides both clients and firms with a secure way to share documents. CCH ProSystem *fx* Scan, mentioned earlier, provides firms with the ability to get a handle on piles of source documents by scanning them into an organized PDF file that can be accessed when the documents are needed. The AutoFlow Technology feature simplifies the process even further by allowing users to quickly populate tax forms with the information on the scanned documents.

CCH Axcess Tax also integrates with CCH IntelliConnect, which is a web-based tax and accounting research platform that offers an extensive amount of tax libraries, tax news, related journals, and business and financial planning resources. The product is cloud-based, and can be accessed from a mobile device as well. Integration with CCH Axcess Workstream offers firms excellent project management capability with the ability to track deadlines, digital route sheets to ensure that documents are routed on a timely basis, and automatic alerts and notifications.

CCH Axcess and all related applications offer excellent help functionality throughout the application as well as a variety of useful online resources such as a video library, a searchable knowledgebase, product guides and reference tools, and access to product support options which include chat support as well as telephone support. All support is included in the price of the product.

CCH Axcess Tax offers users an incredible array of features and functionality – offering seamless integration with practice management, document management, numerous paperless workflow options all designed to simplify everything from initial client contact to final billing, along with everything in-between. For pricing information, please call 1-800-739-9998.

# 2017 Rating: 5 Stars

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