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Mary Girsch-Bock • Aug. 18, 2017



## CCH ProSystem *fx* Tax

### Wolters Kluwer

CCH ProSystem *fx* Tax is part of the comprehensive CCH ProSystem *fx* Suite of products from Wolters Kluwer Tax & Accounting. The product is well suited for accounting firms of all sizes, and is best utilized in an environment where other Wolters Kluwer applications are utilized.

From the **2017 Review of Professional Tax Preparation Systems**.

CCH ProSystem *fx* Tax offers a traditional desktop/network installation. For those interested in the application, but desire 24/7 online access, the product is available in a cloud-based platform — CCH Axxess Tax – which is also reviewed in this issue. Though mobile apps are not available to access the application, users can check the status of returns using a mobile device.

CCH ProSystem *fx* Tax contains a fully customizable user interface screen that offers access to all client engagements, including status and any pending activity. Data entry fields are easily navigated, with data entry following the format of the form

that is being utilized. Calculations are performed automatically, and navigational

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returns and other confidential data, so accountants can send returns and related files electronically to their clients for review, with the client able to upload new or edited files as needed. CCH Axcess Portal supports a variety of file types and sizes, and offers search capability, where users can search for documents using file type, title, creator or keyword search terms.

Using CCH ProSystem *fx* Scan, users can quickly scan large quantities of source documents, with CCH ProSystem *fx* Scan automatically identifying each document to determine what it is. Next, the scanned documents are organized into a single, bookmarked PDF document that accountants can quickly access. Better still, AutoFlow Technology, ~~included in the application~~ an application add-on, can extract data from both 1040 and 1041 source documents and import it directly into the client's tax return.

CCH Axcess Document offers additional paperless workflow solutions, offering electronic document management capability, storing all types of documents for future access. All files are stored in a single, searchable database with version control ensuring that the most recent version of the document is accessed at all times.

Though CCH ProSystem *fx* Tax can be used as a stand-alone application, the ability of the solution to integrate with other CCH ProSystem *fx* Suite software can be beneficial to firms using other Wolters Kluwer products. Along with seamless integration with CCH ProSystem *fx* Scan and CCH applications such as CCH Axcess Document and CCH Axcess Portal, CCH ProSystem *fx* Tax also integrates with CCH ProSystem *fx* Practice Management, CCH ProSystem *fx* Planning and CCH ProSystem *fx* Engagement. It's also integrated with numerous CCH Axcess applications such as CCH Axcess Workstream, designed to manage all work deliverables, and CCH IntelliConnect, a research platform that works as a central information resource application. Integration with third-party applications such as Microsoft Office, QuickBooks, and other accounting applications is available as well. The end result is

a completely integrated system that offers tax planning, tax preparation, practice

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additional research capabilities as well. In addition to these resources, CCH ProSystem *fx* Tax, like all Wolters Kluwer applications, offers a multitude of online resources such as a searchable knowledgebase, FAQs, various user guides, a user forum, and access to various training options. Both telephone and chat support are available, with the cost of support included in product pricing.

CCH ProSystem *fx* Tax is a comprehensive program designed to provide users with excellent tax preparation capability, as well as seamless integration with numerous CCH ProSystem *fx* Suite and CCH Axxess products designed to reduce workload and paper, as well as increase productivity. Pricing is available by calling 1-800-739-9998.

## 2017 Rating – 4.75 Stars

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