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Mary Girsch-Bock • Aug. 27, 2018



ATX – Wolters Kluwer Tax & Accounting

<https://taxna.wolterskluwer.com/professional-tax-software/atx>

From the 2018 reviews of professional tax preparation systems.

ATX from Wolters Kluwer Tax & Accounting is a tax compliance application best suited for small firms that file simple to complex returns. ATX also offers extensive tax law research capability that is designed to integrate with the core system. ATX currently offers five different packages; Pay-Per-Return, 1040, MAX, Total Tax Office, and Advantage editions; with each package offering a variety of features and functionality.

ATX is an on-premise application that can be installed on a local workstation or

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both users and clients to upload and download data from the portal using any device, including smart phones and tablets.

ATX offers an intuitive, forms based user interface, with a variety of tools and resources available to utilize during the data entry process. The product also includes an interview tool that works to guide users through a series of relevant questions in order to complete the required tax form. The ATX form entry screen mirrors the form being prepared, so data input is straightforward, and users can access and even process up to three forms simultaneously, navigating between forms using Page, Worksheet and Form tabs found at the bottom of the data entry screen. IRS form instructions and schedules can also be quickly accessed during the data entry process. ATX also offers line-by-line help functionality, so users will always have access to the latest information for data fields.

ATX currently supports more than 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, with all federal, state, and local forms supported. ATX also supports both sales and use tax returns as well. E-filing is quick and convenient, and can be completed directly from the data entry screen, with users able to e-file both federal and state 1040, federal 1120, 1120s, 1065, 1041, 990, and 5500, along with state returns, where required.

Integration with CCH iFirm Portal allows users to easily share documents with colleagues and with clients. Users are able to log into the system and view when documents were uploaded or downloaded, and the portal home page can be customized to reflect firm branding and messaging. Users can also opt to both send and receive an email when files are uploaded or downloaded if desired.

For firms looking to reduce piles of paperwork, PaperlessPlus offers encrypted document management capability, with the ability to store all tax returns, client

correspondence and source documents, as well as emails and PDFs. Scanned

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ATX offers line-by-line help for all forms being processed in the application. Users can also access complete form instructions directly from the data entry screen. For additional help, users can visit the My ATX Solution Center for quick access to resources such as the searchable knowledgebase, education library, a user guide, and the download center, where any product updates and enhancements can be downloaded. FAQs, the ATX blog, and access to the ATX community are also available from the Solution Center. ATX offers both telephone and web/email support, with support included in the cost of the subscription.

ATX is a good solution for smaller firms looking for an on premise application that offers QuickBooks Online integration. ATX offers a wide variety of packages to choose from, including ATX Pay-Per-Return, which is \$549; the 1040 Package, which is \$699; the MAX Package, which is \$1,649; the Total Tax Office, which is \$2,399; and Advantage, which is \$3,949. Various tax research packages and product add-ons are also available and are priced separately.

2018 Rating: 4.75 Stars

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