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Mary Girsch-Bock • Jun. 18, 2020



Wolters Kluwer

CCH Axxess Tax – Wolters Kluwer

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

From the [2020 reviews of professional tax preparation systems](#).

CCH Axxess Tax from Wolters Kluwer is best suited for small to mid-sized accounting firms, but is also suitable for use in corporate tax departments. CCH Axxess Tax is designed for more complex tax returns, and offers complete cloud accessibility, with a mobile app available for both iOS and Android devices. For those who prefer on-premise deployment, CCH recommends CCH ProSystem *fx* Tax.

What's New

The majority of this year's updates in CCH Axxess Tax revolve around electronic filing updates for specific states. In addition, the batch extension program can now process

multiple extensions using the Batch Manager function. New federal and state forms

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feature has added some enhancements.

Product Features

CCH Axcess Tax includes an easily navigated user interface, using a ribbon style tool bar that will be familiar to Microsoft Office users. The Quick Access toolbar can be customized to suit the needs of any firm, and the dashboard offers quick access to all related projects, tasks, and related client documents. In addition, the enhanced Return Manager allows users to easily customize the on-screen display to only show needed features. Users will also receive instant notifications when a return needs attention.

CCH Axcess Tax users can create organizers for current and new clients, making it easy to collect all the necessary tax information. Users can print and mail or email the tax organizers to clients, or upload them to the client portal, where they can be accessed by the clients at their convenience. In addition, clients can upload all requested tax documents to the CCH Axcess Portal.

CCH Axcess offers five different return types: Individual, Corporation, Partnership, Fiduciary, Employee Plans and Non-Profit, and uses color-coded data entry to make it easy to identify each particular return type. CCH Axcess also supports multiple screens, so tax preparers can easily view multiple screens simultaneously when preparing a return.

CCH Axcess Tax offers complete e-filing capability for all supported forms, including federal, state, and local returns. Users can easily check the status of all e-filed returns, viewing alerts and rejections.

CCH Axcess Tax uses autoflow technology which provides automatic identification and import of all client files directly into the tax return being prepared. Digital tax

workflow is also available in CCH Axcess Tax, automating the entire tax preparation

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management and due date tracking capability; CCH Axcess Practice, which offers complete time and billing capability; and CCH Axcess Portal. CCH Axcess Tax also integrates with CCH IntelliConnect, a web-based application from Wolters Kluwer that offers complete tax research capability without the need to leave CCH Axcess Tax, and CCH ProSystem *fx* applications including CCH ProSystem *fx* Scan, CCH ProSystem *fx* Practice Management, and CCH ProSystem *fx* Document. In addition, CCH Axcess Tax offers complete integration with Microsoft Word, allowing users to customize client correspondence directly in the application.

CCH Axcess offers numerous help and support options. A searchable knowledgebase is available, and users can easily download product enhancements or updates from the website. In addition, CCH Axcess offers product guides, user videos and a community user forum. All registered users have access to telephone support, with email and chat support options available as well.

CCH Axcess Tax is a good fit for small to mid-sized accounting firms that are looking for a cloud-based application that also includes excellent integration with both CCH Axcess and CCH ProSystem *fx* applications. CCH Axcess is available via subscription, with pricing based on number of users, returns, and applications purchased. Contact Wolters Kluwer directly for a demo or quote.

2020 Rating: 5 Stars

Strengths:

- Excellent integration with other CCH applications
- Streamlined data entry available
- Easy system navigation
- Extensive tax research tools available within the application

Potential Limitations:

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