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Mary Girsch-Bock • Jun. 18, 2020



Wolters Kluwer

CCH ProSystem *fx* Tax – Wolters Kluwer

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

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

CCH ProSystem *fx* Tax from Wolters Kluwer is part of the CCH ProSystem *fx* suite. Well-suited for accounting firms of any size, CCH ProSystem *fx* Tax offers both on-premise and online deployment and offers a long list of tax modules including Individual, Partnership, Corporation, Employee Benefit Plan, Fiduciary, Estate and Gift, Exempt Organization, Electronic Filing, Productivity Software, and Data Conversion Services. Interested firms have the option to bundle the modules together, or purchase only the modules needed. CCH ProSystem *fx* Tax does not currently offer a mobile app to be used in conjunction with the application.

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Product Features

For those handling administrative tasks within the application, the Office Manager offers easy setup and management of firm information, as well as the creation and management of office groups, staff, and other CCH ProSystem *fx* applications.

CCH ProSystem *fx* Tax supports multiple screens and offers easy access to system features from the Open Return screen. The screen includes the Client/Return List, a Search Panel, and a Toolbar for easy access to other features including recently accessed returns. The toolbar in CCH ProSystem *fx* Tax is completely customizable, with users able to add, remove, or rearrange buttons and tabs as desired.

CCH ProSystem *fx* Tax includes numerous features designed to reduce the amount of data entry needed including the AutoText Descriptions and AutoComplete. Worksheet preferences can also be set to determine how and when specific worksheets are displayed.

CCH ProSystem *fx* Tax supports thousands of forms and schedules, including 1040, 1041, 1065, 1120, 1120S, 990, and 5500 forms along with all relevant state forms. E-filing is supported for all federal and state forms, with easy check status available to check e-filing status from a mobile device. CCH ProSystem *fx* includes excellent diagnostic capability, with all omissions and errors flagged as well as a return review feature that allows users to view any related notes, overrides, and tax estimates for each return.

CCH ProSystem *fx* Tax does not include a portal in the application, but users can opt to use the CCH Axxess Portal in order to share and exchange files safely and securely with clients.

If used with CCH ProSystem *fx* Scan, the tax application can easily extract data from source documents directly into 1040 returns, and those using CCH ProSystem *fx*

Document will be able to easily manage and store all completed returns and related

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CCH ProSystem *fx* Tax is an all-inclusive application, with all modules integrating seamlessly. The application can be used as a stand-alone tax preparation application or with other CCH ProSystem *fx* or CCH Axcess applications such as CCH ProSystem *fx* Document and Scan, CCH ProSystem *fx* Planning and Practice Management, CCH Axcess Workstream, CCH KnowledgeConnect, and CCH IntelliConnect for even greater functionality.

Wolters Kluwer offers numerous support options for all of its applications, with users able to search for and access the application(s) they need support for. Included in the completely searchable knowledgebase is access to product updates and enhancements as well as product release notes.

A video library is available as is a variety of product-specific articles and guides. Support options available for CCH ProSystem *fx* Tax include telephone, email and chat support. Users also have access to an active user community, where they can share questions and concerns with other users. In addition, Wolters Kluwer offers various training options as well as product conversion services.

Pricing for CCH ProSystem *fx* Tax is dependent on modules purchased, deployment method, and number of users, with those interested able to obtain a quote directly from Wolters Kluwer.

2020 Rating – 5 Stars

Strengths:

- Excellent integration with other CCH applications
- Customizable user interface
- Excellent workflow when combined with other CCH products

Potential Limitations:

- Limited integration with other third-party applications

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