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## PRODUCT & SERVICE GUIDE

# 2020 Review of CCH ProSystem *fx* Scan with AutoFlow Technology

Mary Girsch-Bock • Aug. 17, 2020

CCH ProSystem *fx* Scan with AutoFlow Technology

Wolters Kluwer

[www.cchgroup.com](http://www.cchgroup.com)

From the 2020 review of Tax Document Automation systems.

CCH ProSystem *fx* Scan with AutoFlow Technology is a good fit for CPA firms and accounting professionals of any size. CCH ProSystem *fx* Scan creates digital files while providing users with the ability to bookmark, annotate, and merge multiple files. CCH ProSystem *fx* Scan also offers easy data extraction with the use of the optional AutoFlow Technology feature that is available separately, with the application offering easy data extraction from all source documents directly into Forms 1040 and 1041. Best when used with other CCH applications, CCH ProSystem *fx* Scan can also be used as a stand-alone application.

CCH ProSystem *fx* Scan is available as a cloud-based SaaS application or as an on-premise application. The application offers a scanner tip sheet for new users to get the best quality scanned documents, and with no preparation necessary, scanning can be delegated to support personnel.

**Core Product Functions/Features: 4.75 Stars**

CCH ProSystem *fx* Scan offers easy extraction of data from numerous tax forms including 1098, 1098-T, 1099-DIV, 1099-G, 1099-INT, 1099-MISC, 1099-R, and W-2. Spending hours organizing source documents is a thing of the past, with CCH ProSystem *fx* Scan using advanced technology along with OCR capability to read all scanned documents for easy organizing; recognizing the type of document scanned and later placing it in the correct order. All PDFs are categorized identically across the firm for consistency, with the end result a single, organized, and completely bookmarked PDF file.

Those using the optional AutoFlow Technology feature will enjoy the benefit of having data extracted directly from source documents that will later populate both Form 1040 and 1041, reducing the amount of data entry required. Users can also extract data from brokerage statements directly into a spreadsheet template, where the data can be reconciled for accuracy, which can be attached to the return as a separate PDF. For those worried about accuracy, CCH ProSystem *fx* Scan includes a complete document validation process that provides users with the ability to review all scanned documents for accuracy prior to completing the import process. Once the review is complete, users can import and populate the tax forms with the scanned data.

### **Paperless Workflow: 4.75 Stars**

CCH ProSystem *fx* Scan easily converts stacks of work papers into a completely organized tax binder, eliminating the need to sort papers individually. Minimal prep time is needed to scan documents, so support personnel can easily handle the entire process. Those using PDFlyer will have access to even more features including the ability to annotate any PDF that is created in the application, automatically clean up any scanned documents, and identify and extract data from the scanned documents directly to Form 1040 or 1041. The Auto-Flow feature allows users to review all data that has been extracted from source documents prior to populating the necessary tax forms. Once review, and corrections, if any, are made, the data can be imported directly into the tax form, eliminating the need for data entry.

### **Integration: 4.75 Stars**

Ideal for those using either CCH Axxess or CCH ProSystem *fx* applications, CCH ProSystem *fx* Scan integrates seamlessly with CCH ProSystem *fx* Tax, CCH Global *fx* and CCH Axxess Tax. In addition, any files created by CCH ProSystem *fx* Scan can be saved to CCH ProSystem *fx* Document or CCH Axxess Document for easy retrieval and

users can use CCH ProSystem *fx* PDFlyer functionality for any standard PDF file, whether created by CCH ProSystem *fx* Scan or not.

### **Help/Support/Training: 5 Stars**

Wolters Kluwer offers users easy access to a comprehensive knowledgebase where they can search for answers to questions, review articles, and view product videos. Wolters Kluwer also includes a support center, which is accessible with a valid password, and allows users to open a support case, start a chat with product support personnel, or pose a question to the user community. Toll-free telephone support is available during regular business hours, with support costs included in the cost of the application.

### **Summary & Pricing**

CCH ProSystem *fx* Scan offers seamless integration with both ProSystem *fx* and CCH Axxess applications. The application offers easy source document management, including a bookmarked file that also provides annotation and pagination options. When used with the AutoFlow Technology feature (priced separately), CCH ProSystem *fx* Scan can auto-populate both Form 1040 and 1041 with scanned data. Pricing for CCH ProSystem *fx* Scan varies depending on whether the application is purchased as an on-premise application or a SaaS application.

### **2020 Overall Rating: 4.75 Stars**

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