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Steven M. Phelan • Apr. 21, 2014



CCH Access Tax is the newly rebranded Software as a Service (SaaS) solution from CCH. This wholly cloud-based solution is based on the latest Internet technologies

and provides end users with a modern and updated interface. CCH Access Tax is

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landing screen that shows a list of the most recently accessed returns. A variety of filters are provided on the left part of the screen to easily find specific returns. Custom filters may also be set up based on predetermined filter settings.

The CCH Access Tax interface is similar to recent versions of Microsoft Office. Navigation across the top of the screen is achieved through a ribbon interface that changes slightly based on where the user is within the program. Multiple dashboard options are provided with the system, but these largely focus as shortcuts to other areas within the system. Preparers and reviewers may also communicate through these dashboards with direct links to client files.

A new interface option was added mid-year 2013 that allows users to see all worksheets and forms on one screen as opposed to the traditional folder tree structure. Each worksheet or form that has data for the current or prior year appears as a blue link.

Major enhancements for the current year release center around the addition of multiple electronic filing options. A lot of email automation has been added to inform both the preparer and client of acceptance of electronically filed returns. Reminder emails may also be sent to prompt clients to send in the required electronic filing signature sheets. Newly added is the ability to send quarterly estimated tax payments from within the system.

Prior to completion of the return, a comprehensive diagnostic system is provided that includes information, caution and electronic filing diagnostics. Each diagnostic is detailed and many provide direct links to the underlying worksheet or form to correct any problems. Any overrides in the return are consolidated into one easily accessed area.

CCH Axxess Tax can be used across multiple monitors and allows the form and

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database. Each of these products share data with each other to help reduce data entry. Many of the CCH desktop solutions are also fully integrated with CCH Axxess Tax. Third party vendors can also achieve integration through the Open Integration Platform provided by CCH. This platform allows third party vendors and internal IT staff to develop integration points as required.

Microsoft Office is deeply integrated, and a differentiator for CCH Axxess Tax is the extensive use of Microsoft Word as the letter generation engine. By using Microsoft Word, the learning curve is drastically reduced for end users and firm templates can be set up that include specific fonts and logo placement. Use of these templates can assist with document consistency across the organization.

Microsoft Excel may be used for importing and exporting data. On many of the worksheet input screens, an option is provided to export a preformatted template to Microsoft Excel. The end user simply populates the template as appropriate and imports the template back into the software. This drastically reduces the need for manual data entry and these templates may oftentimes double as a workpaper.

Direct links to IntelliConnect and other CCH online research solutions are provided through a right click menu option. As users navigate through the system, the research options change to mirror the screens the user is currently viewing. This reduces the amount of keyword searches that would ordinarily be required. Users will need a valid login to access these separately offered research solutions.

Paperless Workflow: 4.75 Stars

CCH Axxess Tax has a large number of built-in return review elements. Prior year numbers are displayed on each data entry worksheet screen. This reduces the need to have the prior year return open and assists the user with where to enter data. After

all data is entered into the return, reviewers may double-click from the return output

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Reviewers have up to three tickmark options which are available on both the date entry worksheets and the on-screen tax return forms. Each tickmark is delineated by a red, blue or green color scheme to easily see who has approved or reviewed the return.

Remote Capabilities: 4.75 Stars

Anytime, anywhere access is at the core of the CCH Axxess Tax capabilities. The solution is wholly Internet based and may be accessed through a variety of sources. With the newly released mobile application, users can access the solutions through Android and Apple devices in addition to the desktop interface. The apps are free, but will require user login information for access.

CCH Axxess Tax data is stored in a Tier 4 data center to help ensure all firm data is adequately protected. Several additional security measures are also implemented including advanced data encryption techniques. By designing the software and the data center environment to support a high level of security, firm data access can be controlled and limited to firm employees and other authorized individuals.

Because this is a cloud based solution, Internet speed is an important consideration. Though the solution does not require a specific speed or setup to work, practitioners should ensure that speed and bandwidth needs are adequate. This is especially true for firms with multiple users simultaneously accessing the solution through the same Internet connection.

Summary & Pricing

CCH Axxess Tax is a cloud-based tax preparation, compliance and firm management solution. Built on the latest .NET technology, CCH Axxess Tax is part of a cloud suite offering, but still maintains integration points from traditional desktop solutions.

The product is fully scalable to meet the needs of firms of any size and client

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require worker mobility

STRENGTHS

- Integration with MS Word for letter generation
- Multiple access options via desktop and mobile devices
- Integration platform available to bridge in third-party applications and data

POTENTIAL WEAKNESSES

- Without Internet connection the product will not properly function

2014 Overall Rating: 4.75 Stars

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