character recognition (OCR) functions for identifying scanned-in tax forms and extracting data from the forms. It can be used as an integrated part of CCH's ProSystem fx Suite …

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From the 2015 Review of Tax Document Automation Systems.

Best Fit: Professional accounting firms who want to automate their tax workflow within the ProSystem *fx* and CCH Axcess Suite of tax and accounting programs.

Strengths

- AutoFlow Technology feature facilitates validation of data
- Fast and accurate optical character recognition (OCR)
- Good options for user customization with annotation and bookmark features
- Options for annotating, managing bookmarks and repaginating PDF documents
- Dual screen review interface offers view of forms and source documents

Potential Limitations

- The AutoFlow feature (for populating tax returns) only imports data into Wolters Kluwer's CCH tax products, although the OCR functions can be used regardless of tax program.

- The program is geared toward firms with a moderate or large volume of individual

ProSystem fx Tax, Global fx, and CCH Axcess Tax. CCH ProSystem *fx* Scan and AutoFlow Technology can be installed on a firm's computers or servers, or used as a cloud-based system hosted on Wolters Kluwer servers.

Core Product Functions/Features: 4.75 Stars

As previously noted, there are two primary components of the system. CCH ProSystem *fx* Scan processes scanned-in client documents and uses optical character recognition (OCR) to create bookmarked PDF copies of those client documents. It can recognize a broad array of tax-related materials, including W-2s, K-1s, 1098s, 1099s, and brokerage statements. Even when documents are scanned in any order, the system recognizes the forms and places them into the digital workpapers in proper engagement order.

Optional AutoFlow Technology functionality takes the tax automation process a step further, pulling data from the scanned source documents, offering a review process, then populating a client's tax return within CCH ProSystem *fx* Tax, Global *fx*, or CCH Axcess Tax. The system uses an optional validation process for review and then populates the client's tax return with the data.

The digital workpapers created by Scan can be further edited using PDFlyer, an additional add-on utility that gives users the ability to annotate, markup, and review the bookmarked PDF documents. Users can also merge and append the PDF tax binder when if clients later provide additional tax documents.

Paperless Workflow: 4.5 Stars

The initial process starts with scanning in the client documents, best done with a multi-sheet feed scanner. The OCR system automatically identifies the form (W-2, 1099, K-1, etc), arranges them into 1040 tax return order, then pulls relevant data

from the forms, including SSN/TIN. SSN/TINs found in the sourced documents are

creates a list of missing and skipped forms, and shows any invalid fields.

Integration: 4.5 Stars

CCH ProSystem *fx* Scan directly integrates with the tax, workflow management, and document managementsystems in the CCH ProSystem *fx* Suite and cloud-based CCH Axcess Suite. The tax form auto-population features in AutoFlow work with both the traditional CCH ProSystem *fx* Tax and Access Tax. PDF tax workpapers may be automatically routed to CCH ProSystem *fx* Document or CCH Axcess Document.

Help/Support/Training: 4.5 Stars

CCH ProSystem *fx* Scan and AutoFlow Technology both come with comprehensive user guides and implementation instructions. Web-based and live, on-site user training is available to optimize use of the systems, while implementation consulting is also offered. Online self-help features include the CCH Support Knowledgebase, documentation, news, online chat and phone support.

Summary & Pricing

CCH ProSystem *fx* Scan offers excellent firm management and review options, with highly accurate OCR capabilities, and is available in both firm-hosted and SaaS versions. Digital PDF workpapers include annotation, bookmarking and pagination options. Pricing for CCH ProSystem *fx* Scan varies, starting around $5,250 for the firm-hosted version with unlimited use. CCH ProSystem *fx* Scan (SaaS) starts at $675 annually based on the number of client files processed. AutoFlow Technology costs $14 per client return (which includes all documents associated with a return). The Scan (SaaS) version is sold in bundled quantities.

2015 Overall Rating: 4.5 Stars

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