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Best Firm Fit: CCH Axcess Tax is generally best-suited to mid-sized and larger full-

- Offers extensive integration within the suite with solutions for document and practice management, workflow optimization and client collaboration portals.
- Open Integration Platform extends integration options to additional third-party software
- Customizable user interface offers ease-of-use and streamlined data entry

CCH Axcess offers a comprehensive, cloud-based suite of professional accounting and tax systems that utilize a singular database and can enhance firm productivity across multiple engagement types, and help firms standardize their workflow processes. CCH Axcess Tax is the professional compliance system within the suite, with the ability to prepare all U.S. tax returns at the state and federal level, and most municipal returns.

Core Product Functions/Features: 5 Stars

CCH Axcess Tax includes modules for preparation of forms 1040, 1041, 1065, 1120, 1120s, 706, 709 and 5500, as well as their state counterparts, with electronic filing of all returns that are accepted in that format. The system can support any number of users within a firm, based on licensing of the cloud-based program. The system can also be used for preparing prior-year returns, and utilities offer the ability to roll return data forward.

The primary user interface for CCH Axcess Tax is centered around the dashboard, which offers at-a-glance overviews and access to client information, email, calendar items and notifications, and which can be customized to user preferences. User options are also determined by the security logins and roles determined by firm management, with staff only allowed access to returns for which they have been assigned. The system also offers a client return management screen that includes filtering and search options, and shows details on return status, e-file acceptance status, and which staff member is responsible for the engagement.

Additional customization functions allow firms and users to create custom batch sets

for all forms that the IRS and states accept electronically.

For the latest tax year, new features included the CCH My1040Data tool, an online client tax organizer that guides them through the process of entering tax data and documents, which the firm then uses to prepare the return. The organizers offer flexible data entry, while tools also make it easier to file extensions. Additional new features include enhanced e-filing options, amortization reporting, new forms, schedules, workflow features and compliance updates.

Integration Options: 4.75 Stars

Through the suite of CCH Axcess products and professional Wolters Kluwer solutions, firms can benefit from extensive integration options. CCH Axcess uses a singular database across all applications, eliminating data conflicts and reducing entry, while return data flows to associated programs. Within the tax compliance system, data also flows directly to inter-related returns, such as parent-child and pass-through income from K-1s.

The program directly integrates with the optional CCH Axcess Document for document management and storage, while the optional CCH Axcess Portal can be used to securely collaborate with clients, allowing them to send source documents and other materials, while the firm offers anytime access to a client's returns or reporting. Firms can utilize the CCH IntelliConnect research platform, which includes comprehensive primary source tax information at the federal and state level, as well as in-depth analysis and guidance. The Open Integration Platform offers additional integration options with third-party software.

Paperless Workflow: 4.75 Stars

Firms using CCH Axcess can enhance their paperless workflow options via the CCH

collaboration tools for sharing client documents securely, while the CCH eSign system provides support for electronic signatures on tax forms, 8879, engagement letters, W-9s and other documents.

Remote Capabilities: 5 Stars

As a cloud-based system, CCH Axcess offers all of the benefits of remote access via laptops and tablets and eliminates the need to maintain system upgrades. Free mobile apps are also available for Apple and Android users that offers access to client management functions, document management and time entry. The system is automatically updated by the vendor during non-peak hours, and all data is backed up on secure systems.

Help/Support – 5 Stars

The cloud-based CCH Axcess Suite offers a wide variety of online assistance features, including in-return functions such as line-by-line help and form instructions. Additional tools include an online Answers Database, FAQs, guides, online self-study courses, CPA management, webinars and other training options. Phone and web-based chat support are included in system pricing.

Summary & Pricing

CCH Axcess Tax offers an exceptional cloud-based, professional tax compliance solution with modules for all taxing entities, and strong integration with practice management, document management, collaboration and workflow-enhancing utilities. The system is available in several subscription models, with pricing starting at $3,700 per year.

2016 Overall Rating: 5 Stars

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