that can be used as a stand-alone system or as part of a broad suite of professional tax, engagement and firm management tools and resources. The desktop-based system can be ins

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From the 2016 Reviews of Professional Tax Preparation Systems.

Best Firm Fit: Full service accounting firms with clients that range from very complex corporate and organizational returns, to simple individual returns. The program also includes workflow tools that streamline multi-preparer collaboration processes and review.

Highlights

- The tax compliance system is part of a comprehensive suite of integrated accounting and practice management products
- Well-designed interface offers intuitive navigation and drill-down access to related forms, schedules, worksheets, state forms and inter-related returns
- Strong diagnostic tools that find omissions and inconsistencies, tracks overrides
- Centralized return management overview offers details on return status from initial client interview, through preparation, review and electronic filing
- Optional add-ons for advanced practice management, tax planning

CCH ProSystem *fx* Tax is a professional tax preparation and management program

and state annual income reporting returns: 1040, 1041, 1065, 1120, 1120s, 990, and 5500, plus estate and gift tax returns.

CCH ProSystem *fx* has a user-customizable home screen that lists all client engagements the user has access to and shows return status and pending actions. The client selection list also offers search and filter options. Security features limiting the roles and activities users can perform. The system's preparation processes are user-friendly and also innovative, with a sliding data entry format design, with data entry fields that follow the structure of the form being worked on. Forms offer automatic calculation, with data routed to appropriate form lines and supporting schedules and worksheets. The program includes thousands of state, federal and local forms, with most available for e-filing.

The newest features added to CCH ProSystem *fx* Tax include the My1040 Data utility, which offers a web-based tax organizer firms can send to clients that simplifies the gathering of tax information for individual clients. The organizer was designed with input from clients and firms with the goal of providing an easy-to-use system with flexible data input methods and status tracking functions. For the 2015 tax year, enhancements were also made to e-filing functions, amortization reporting, drill-down capabilities and for filing extensions.

An email feature offers automated notifications to preparers and clients when electronically processed returns are accepted by the IRS. A reminder tool also sends emails to clients alerting them to tasks such as missing data or final sign-offs.

Integration Options: 4.75 Stars

As noted previously, the CCH ProSystem *fx* Tax program can be used independently, but firm's realize greater efficiencies when it is used as a part of the comprehensive CCH ProSystem *fx* Suite, which includes programs for tax planning, tax document

automation (scan, organize and populate), engagement, document and practice

system can import data from QuickBooks and other business accounting systems. The CCH ProSystem *fx* Suite offers some integration with Microsoft Office programs.

Paperless Workflow: 4.75 Stars

With the ProSystem *fx* Scan utility, firm administrative staff can scan client source documents, which are then automatically sorted into proper engagement order and converted into a comprehensive set of PDF workpapers for individual and fiduciary returns that are organized and bookmarked. After review, the data can then be imported into a client's return (using the optional AutoFlow system), eliminating a good amount of manual data entry and time spent pulling data from the documents.

Additional paperless workflow options are also available in CCH Axcess Document that integrates with CCH ProSystem *fx* Tax, with automated retention functions and digital file backup. CCH Portal offers client collaboration tools for sharing client documents securely, while the CCH eSign system provides support for electronic signatures on tax forms, engagement letters, W-9s and other documents.

Remote Capabilities: 4.75 Stars

Firms can implement CCH ProSystem *fx* Tax as a remotely accessible hosted application using CCH Global *fx*. This provides firms with the same interface, workflow and utilities as the installed version. Users access the system via their browser.

Help/Support – 4.75 Stars

Users of the CCH ProSystem *fx* program can access line and form-specific help and instructions as they make their way through data entry forms, and also have direct access to research and guidance if used in conjunction with the CCH IntelliConnect research platform. The system also offers a traditional program help utility, while

online resources include a Knowledge Base, FAQs, data analysis tool, various guides

supported, with packages starting at about $3,700. A "Pay As You Process" option is also available.

2016 Overall Rating: 4.75 Stars

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