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Mary Girsch-Bock • Aug. 27, 2018



CCH ProSystem *fx* Tax

Wolters Kluwer Tax & Accounting

<https://taxna.wolterskluwer.com/professional-tax-software/prosystem-fx>

From the 2018 reviews of professional tax preparation systems.

CCH ProSystem *fx* Tax from Wolters Kluwer Tax & Accounting is part of the CCH ProSystem *fx* Suite. Designed as an on-premise solution, CCH ProSystem *fx* Tax can be installed on desktop and network systems. Well-suited for accounting firms of all sizes, CCH ProSystem *fx* offers optimum value when used with other CCH ProSystem *fx* applications.

CCH ProSystem *fx* Tax allows users to use interview forms or worksheets when entering tax data. The interview forms provide easy data entry by mirroring the form being utilized, with a convenient Zoom feature available to enlarge forms if necessary. All available worksheets are categorized in a drop-down menu for easy access, with users able to hide sections of the worksheet if desired. Users can search for a return by client or by specific criteria, or by accessing the client return list. Users can also customize the Tax Preparation Toolbar to better suit their needs by adding,

removing or rearranging buttons, inserting separators, or resetting the default

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CCH ProSystem *fx* Tax offers a complete diagnostic system, which scans all prepared forms for inconsistencies or missing data. Navigation panels and pop-up menus are also available to guide users through each return.

Integration with the CCH Axxess Portal provides firms and their clients with the ability to share source documents, completed tax returns, and other data confidentially. The portal supports a variety of file types and sizes and also offers excellent search capability using file type, keyword, or creator search terms.

A variety of CCH ProSystem *fx* applications are available to facilitate a paperless workflow, including CCH ProSystem *fx* Document, which offers complete document management capability that easily stores all workpapers electronically for easy access from within the system. Prepared returns can be linked to clients in Document, and users can easily print completed returns directly into Document as needed. Document is completely searchable, and utilizes version control, so users will always know that they are accessing the most recent version of any document stored. And those using CCH ProSystem *fx* Scan can process a large number of documents, with all scanned documents automatically identified and organized in a bookmarked PDF document.

CCH ProSystem *fx* Tax can be used as a stand-alone application, but firms will really benefit from the level of integration the application has with other CCH ProSystem *fx* and CCH Axxess applications including CCH ProSystem *fx* Document and Scan, mentioned earlier, as well as CCH ProSystem *fx* Planning and Practice Management, as well as CCH Axxess Workstream, CCH KnowledgeConnect, and CCH IntelliConnect; Wolters Kluwer Tax & Accounting's research platform that is designed to be a central information resource for accounting professionals. This seamless integration results in complete tax and practice management capability, with document management and tax research capabilities included.

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application.

CCH ProSystem *fx* Tax is a comprehensive tax compliance application suitable for firms of all sizes. Though the product can be used as a stand-alone application, when used with other CCH ProSystem *fx* or CCH Axcess applications, users are presented with complete tax and practice management capability. Pricing for CCH ProSystem *fx* Tax varies depending on number of users and modules purchased, with pricing available directly from Wolters Kluwer Tax & Accounting upon request.

2018 Rating: 4.75 Stars

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