Mary Girsch-Bock • Jun. 11, 2019

ATX

Wolters Kluwer

https://taxna.wolterskluwer.com/professional-tax-software/atx

From the 2019 reviews of professional tax preparation systems.

ATX from Wolters Kluwer is a tax compliance application that is well suited for small to mid-sized accounting firms that typically file fairly uncomplicated returns. ATX also offers excellent tax law research capability that integrates with the core tax preparation system and can be accessed from a desktop/server environment or from a mobile device. ATX currently offers multiple tax packages including Pay-Per-Return, 1040, MAX, Total Tax Office, and Advantage editions; with each package offering a variety of features and functionality.

Designed as an on-premise application, ATX can be installed on a stand-alone

Integration with the CCH iFirm Portal allows users and clients to upload and download documents from any device including smart phones and tablets.

ATX offers user-friendly navigation, with users having access to the Return Manager, Rollover Manager, E-File Manager, and Bank Manager from the main screen. ATX offers an interview tool that guides users though the form preparation process, with the form entry screen mirroring the form itself for easy navigation. Users can process up to three returns simultaneously, easily navigating between returns when necessary. IRS form instructions and schedules are easily access at any time, and line-by-line help is available as well.

More than 7,000 forms are available in ATX, with users able to view the complete list of available forms and schedules from the ATX website. Standard forms for individuals include 1040, 1040 NR, 1041, with all corresponding schedules included as well. Corporate, Partnership, and Fiduciary forms are available as are all state and local forms. The product also supports both sales and use tax returns as well as complete e-filing for both federal and state forms including 1040, federal 1120, 1120s, 1065, 1041, 990, and 5500, along with state returns, where required.

ATX supports multiple preparers, and CPA firms can also choose to add additional users if necessary. ATX does not include a portal, but does offer complete integration with the CCH iFirm Portal, which allows clients and firms to share confidential documents securely. Users can easily log into ATX to view any documents that have been uploaded or downloaded, with the portal home page completely customizable in order to reflect firm branding. System users can also choose to be notified via email when a file has been uploaded or downloaded to the portal.

ATX offers complete e-filing capability through the E-File Manager, which organizes and tracks the status of all e-filed returns. ATX Total Tax Office also includes

PaperlessPLUS, designed to improve workflow and allows users to easily manage

Along with access to online tax guides and other diagnostic resources, users can visit the My ATX Solution Center to access the product knowledgebase, educational library, video center, and a getting started guide. Users can also download any system enhancements or updates from the Solution Center as well, with FAQs, the ATX blog, and a robust online community available as well. ATX offers both telephone and web/email support, with all support included in the price of the product.

ATX is an on-premise application that is a good solution for small to mid-sized accounting firms that process a high number of returns and need access to a large variety of forms and schedules. ATX currently offers five packages which include ATX Pay-Per-Return, which is $569; a 1040 Package costing $759; the MAX Package at $1,789; Total Tax Office, which is $2,599; and Advantage, which is $4,269. Various add-on applications are also available from ATX as well, with all priced separately.

2019 Rating: 4.75 Stars