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**Mary Girsch-Bock** • Jun. 11, 2019



### **CCH ProSystem *fx* Tax**

**Wolters Kluwer**

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

From the 2019 reviews of professional tax preparation systems.

CCH ProSystem *fx* Tax from Wolters Kluwer is part of the CCH ProSystem *fx* Suite, and is well suited for accounting firms of any size. CCH ProSystem *fx* Tax is available as an on-premise solution and is scalable, offering a long list of modules including Individual, Partnership, Corporation, Employee Benefit Plan, Fiduciary, Estate and Gift, Exempt Organization, Electronic Filing, Productivity Software, and Data Conversion Services, with firms able to bundle all of the modules for a complete solution, or purchase only the modules needed.

CCH ProSystem *fx* Tax uses worksheets and interview forms for entering tax data, with the interview forms mirroring the form itself for easy navigation. A zoom feature is also available to enlarge forms if desired. All worksheets available in CCH ProSystem *fx* Tax can be accessed directly from the drop-down menu at the top of the main screen. Users can search for a specific client in the application or access a client

from the client list. There is also a Tax Preparation Toolbar available that is

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through each return smoothly. There is also a return review system available that allows users to view tickmarks, notes, overrides, and estimates.

If a client portal is desired, CCH ProSystem *fx* Tax integrates with CCH Axxess Portal to provide complete sharing of source documents, completed tax returns, and other confidential data. The portal supports a variety of file types, and users can easily search the portal by file type or by entering a key word or phrase to locate a particular document.

Using CCH ProSystem *fx* Scan along with CCH ProSystem *fx* Tax allows users to easily extract data from source documents and import it into 1040/1041 returns. Those firms using CCH ProSystem *fx* Document can easily store all completed returns and related workpapers electronically for easy future access. Users can also print returns directly into CCH ProSystem *fx* Document directly, avoiding the need to scan documents. Users can easily link all prepared returns to a specific client, and the version control feature ensures that users are accessing the most recent version of any stored document.

CCH ProSystem *fx* Tax is an all-inclusive application, with all modules (mentioned earlier) designed to completely integrate. Though CCH ProSystem *fx* Tax can be used as a stand-alone application, firms will find the product can offer much more when coupled with other CCH ProSystem *fx* or CCH Axxess applications such as CCH My1040Data, designed to make it easier for clients to submit their personal data and tax information, while eliminating the need for clients to answer questions that do not apply to them. As mentioned, CCH ProSystem *fx* Tax also integrates with other CCH ProSystem *fx* applications such as CCH ProSystem *fx* Document and CCH ProSystem *fx* Scan, as well as CCH ProSystem *fx* Planning and Practice Management, CCH Axxess Workstream, CCH KnowledgeConnect, and CCH AnswerConnect, resulting in complete tax and practice management capability.

Wolters Kluwer offers complete product support for all of their solutions, with users

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ProSystem *fx* Tax pricing depending on modules purchased and number of users. For more information, call 1-800-739-9998, option 1 followed by option 2.

## 2019 Rating – 5 Stars

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