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Wolters Kluwer

### **CCH ProSystem *fx* Scan and AutoFlow Technology**

**Wolters Kluwer**

<http://TaxNA.WoltersKluwer.com>

**1-800-739-9998**

**From the August 2019 reviews of tax document automation systems.**

CCH ProSystem *fx* Scan and AutoFlow Technology is a good fit for professional accounting and CPA firms that currently use other CCH applications such as CCH ProSystem *fx* Tax and CCH Axxess Tax. CCH ProSystem *fx* Scan creates digital files, with users able to annotate, bookmark, and merge multiple files. AutoFlow Technology provides easy data extracting from source documents directly into IRS 1040 and 1041 forms. CCH ProSystem *fx* Scan can be used as a stand-alone application, though functionality is substantially increased when used with other CCH applications.

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CCH ProSystem *fx* Scan uses advanced technology and OCR capability to read data properly when creating the PDF file. This allows the application to recognize the type of document and place it in the correct order, with all PDFs arranged in the same order for consistency across the firm, creating a single, organized, and bookmarked PDF file. Users can also use the AutoFlow Technology feature, which easily extracts data from scanned source documents in order to populate client 1040 and 1041 forms in order to reduce data entry. Firms can also extract detailed Gain and Loss statement data from brokerage firms directly to a preconfigured spreadsheet, where information can be reconciled and the appropriate gain or loss amount statement created, which can be attached to any return as a separate PDF. The product includes a document validation process that allows users to quickly review all scanned documents for accuracy. Once they've been checked, users can choose to populate the tax forms.

For added convenience, PDFlyer, a plug-in for Adobe Acrobat, provides additional PDF editing tools such as the ability to rearrange file pages, merge PDFs, and can utilize up to five monitors simultaneously.

### **Paperless Workflow: 4.75 Stars**

CCH ProSystem *fx* Scan will easily convert stacks of documents into a single organized bookmarked PDF file. Minimal preparation is required for scanning, allowing support personnel to handle the scanning process. PDFlyer offers more document flexibility, allowing users to annotate any PDF created. During the scanning process, CCH ProSystem *fx* Scan will also clean up the scanned documents, while identifying and extracting the necessary data from the documents and importing it into 1040/1041 forms. The AutoFlow feature allows users to easily review extracted data prior to populating the necessary tax forms. Once the data is reviewed, it can be imported directly into the client tax return, eliminating the need for manual data entry.

Gain and Loss statement data can also be extracted to a preconfigured spreadsheet

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ProSystem *fx* PDFlyer can also be used with any PDF file, whether it's created by CCH ProSystem *fx* Scan or not.

### **Help/Support/Training: 5 Stars**

Wolters Kluwer maintains a comprehensive knowledgebase for all of their products, where users can type in a search term, review articles, access help files, and view product videos. Users can also access the support center, where they can open a support case, chat with a product expert, or ask the community. Toll-free telephone support is also available during regular business hours, with all support costs included in the price of the product.

### **Summary & Pricing**

Now available as a SaaS application, CCH ProSystem *fx* Scan offers easy integration with other CCH ProSystem *fx* applications as well as integration with CCH Axcess applications; offering easy source document organization, while also creating a bookmarked file that includes annotation and pagination options. When used in conjunction with AutoFlow Technology, which is part of the application, firms can easily auto-populate both 1040 and 1041 forms with the relevant scanned data. CCH ProSystem *fx* Scan pricing varies, depending on deployment option and whether firms choose to utilize the AutoFlow technology, which is currently priced separately.

### **2019 Overall Rating: 4.75 Stars**

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