Mary Girsch-Bock • Jun. 18, 2020

ATX – Wolters Kluwer

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

From the 2020 reviews of professional tax preparation systems.

ATX from Wolters Kluwer is a tax compliance application that is best suited for small to mid-sized accounting firms that typically process uncomplicated returns. 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.

ATX is designed to be deployed as an on-premise application, with Windows 8.1+ required for installation. Users can also opt to have the application hosted on a cloud server for anytime/anywhere system access.

What's New

made, including the consolidation of schedules. Going forward, ATX will not be supported on Windows 7 operating system.

Product Features

ATX offers easy system navigation, with users able to access clients, return type, and e-file status, as well as application features such as the Return Manager, Rollover Manager, E-File Manager, and Bank Manager. In addition, the toolbar at the top of the screen offers direct access to CCH iFirm, as well as the Client Portal.

ATX allows users to enter data directly on the tax forms, or they can use an Interview feature that guides users through a series of questions and includes the ability to input answers into the appropriate area as interview questions are answered. The Interview feature is a great option for those new to the application. All form entry screens mirror the actual tax form being completed, and users are able to process up to three forms simultaneously using the Page, Worksheet, and Form tabs that are available in the application. Users also have access to all IRS form instructions and relevant schedules, with line-by-line help offered in the application as well.

ATX supports more than 6,000 forms. Standard forms include 1040, 1041, 1120, 1120S, and 1065, with schedules included. State and local forms are included as are sales and use tax returns.

ATX plans support multiple preparers, and users can access the CCH iFirm Client Portal directly from the ATX toolbar at the top of the screen. The portal allows users to manage client documents, upload completed returns for clients, and clients can upload source documents as needed. Users are also notified when a document has been uploaded or downloaded from the portal.

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

errors and omissions. For firms looking to reduce paper usage, ATX Total Tax Office

U.S. Master Tax Guide, Basic CodeConnect for easy navigation through Internal Revenue Code, and a client letter toolkit.

Users can also access product help from within the application, and MyATX Solution Center offers access to the product knowledgebase, an educational library, a video center, as well as a Getting Started Guide. Users can also access FAQs as well as the informational ATX Blog, which is now available in the News Feed. ATX also offers telephone and email support, with support included in the cost of the application.

ATX is a good solution for small to mid-sized accounting firms that process a high number of returns and also need access to a wide variety of forms and schedules. ATX currently offers five packages which include ATX Pay-Per-Return, which costs $597 per year, a 1040 Package, which costs $799 per year, the MAX Package, which costs $1,880 per year, and the Total Tax Office and ATX Advantage, with pricing available directly from ATX. A variety of add-on applications are also available from ATX, all priced separately.

2020 Rating: 4.75 Stars

Strengths:

- Good integration with other CCH applications
- Scalable, with five plans available
- Easy, intuitive system navigation
- QuickBooks Online integration

Potential Limitations:

- Limited tax planning

- No mobile app