



## ProSystem fx<sup>®</sup> Tax

The next generation of intelligent tax workflow, preparation, and compliance software

The next generation of ProSystem fx<sup>®</sup> Tax is here!

A complete tax preparation, compliance, and delivery solution with dynamic information flow and integrated research capabilities, ProSystem fx Tax will transform the way you perform your tax work.

### Working Smarter, Not Harder, is Now Possible

With the next generation of ProSystem fx Tax, you'll work faster AND smarter — and whenever and wherever you'd like. The ProSystem fx Tax platform is completely new, built with Microsoft<sup>®</sup>'s .NET 3.5 Framework, and available as a SaaS (Software as a Service) deployment that is hosted on CCH servers.

This new Web-optimized version of ProSystem fx Tax is easy to access, use and update. No time-consuming implementations or transitions to new versions. New enhancements are available immediately and seamlessly.

Many of the features and functionality that make ProSystem fx Tax top of the line have been enhanced and improved, with each change based on intensive client-centered research. No matter what tax preparation software you're using, with the next generation of Tax you'll be delivering high-quality service to your clients in significantly fewer hours.

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### Interconnecting Products Give You Unparalleled Power

Thanks to seamless integration with the other ProSystem fx products, ProSystem fx Tax provides you with a complete tax preparation and delivery system plus a whole lot more.

All next generation ProSystem fx applications will integrate with a common client database, so you'll have a single point of access for set up and administration of multiple ProSystem fx applications. A shared dashboard provides information in one convenient place. You'll also gain significant portability and collaboration features because the software is designed to be deployed online.



The Dashboard — shared by the ProSystem fx next generation applications — provides quick visibility to work in progress and easy access to other applications, including your Outlook<sup>®</sup> calendar and email inbox.

## Reducing Time-Consuming Steps Drives Down Associated Costs

The dynamic processes used by ProSystem fx Tax for managing the flow of returns and moving them through the review cycle will streamline any firm's current tax preparation work.

Many of the time-consuming steps in the tax preparation workflow will improve dramatically with the next generation of ProSystem fx Tax.

Imagine the productivity gains of reducing:

- The overall cycle time — from gathering client information to moving a return through preparation, to creating, calculating, and delivering an accurate tax return.
- The time spent reviewing and clearing diagnostics, and communicating with others on the team regarding issues and status.
- The need to re-enter data that already exists in other applications.
- The time it takes to trace the input data to ensure everything was included and is in the right area, and then to understand the calculation.
- The time required to assemble all the forms in the right order, with the right correspondence.

Once you have ProSystem fx Tax in place, accuracy will go up, reviewing time will go down, and client re-work will decrease significantly.

## Intelligent Direction Every Step of the Way

Get ready for more help than you ever thought possible, as the program guides you through the entire return process in the most fluid and productive way possible — from client planning and preparation to final sign-off and delivery, for each and every client, simple to complex.

Many firms have resorted to manual checklists, homemade tools, and manual review processes to ensure that all aspects of the return are addressed properly, all documentation is complete, and all relevant information has been transferred to countless forms. ProSystem fx Tax does this automatically — recommending items that need review or information that may be missing, and flowing information to all relevant schedules and forms. It continually monitors data relationships to ensure accuracy and completeness.

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## Well-Designed Features Professionals Will Truly Appreciate

With the next generation of ProSystem fx Tax, you'll benefit from:

- New look and feel.** Having the same familiar user interface as Microsoft® Office 2007 translates into ease of use. Helpful tooltips provide instant information about the function of a particular icon. You can drag and drop your most-used tools into the Quick Access Toolbar.
- Customized views that are transparent to the way you work.** Customize what information about returns is displayed with enhanced Return Manager functionality. Choose the information to include and change views on the fly. Use quick filters and groupings to arrange returns in the desired order.
- Practical tools for on-screen review.** Increase the efficiency of your on-screen reviews with features that include tick marks and diagnostic sign-offs.
- Robust diagnostics.** The application alerts you to incomplete returns or steps, changes that need to be reviewed, conflicts that need to be resolved, and more.
- Dynamic preparer notes.** A fully integrated preparer notes system allows preparers to create and respond to an array of note types with powerful features that help you assign, review, and batch purge — with a click.
- Routing Sheet.** If you are also using ProSystem fx Workstream, you can click on the icon and update the routing sheet. You always know where things are in the process.
- Expert guidance.** Contextual help, examples, and practice points — as well as real-time links to content on CCH's IntelliConnect® — help provide the information needed to efficiently research topics, answer questions and manage the return preparation process.
- Instant Notification.** Integration with the Suite dashboard gives immediate notification to the partner when a return needs their attention, eliminating the time returns are waiting for the next step in the cycle. By clicking on the note in the dashboard, the return is launched and a partner is taken directly to the specific field within the return and form needing their attention.
- The best of high-tech and high-touch for client communications.** Create professional correspondence that you build from templates and edit in Microsoft® Word. Then, save to libraries and easily reuse the content in any return. You'll have complete control over your correspondence.
- Streamlined, sophisticated printing options.** Create custom print sets for everything to be printed with a return, for every return type. Send a job to multiple destinations, insert objects and add watermarks.
- Numerous return distribution possibilities.** Tax returns can be sent to CCH's e-file system, printed to a printer, archived in ProSystem fx® Document, or published in ProSystem fx® Portal for clients to access.

Detailed tooltips describe each option, saving time and increasing efficiency.

An intuitive navigation pane helps you move around the return and switch between Worksheet View and Government Forms.

Four different kinds of notes help you communicate more effectively throughout the process. Retention rules determine which notes are purged, saved or carried forward when the return is rolled forward.

The screenshot shows the 'Basic Data' section of the software, including fields for Home state (NY), Filing status (Single), and Taxpayer information (Alice Jones, SSN 455-40-4000). Below this is a 'Notes' table with columns for Note Type, Subject, and Retention rules.

Note Type	Subject	Cleared	Cleared By	Cleared Date	Retention	Requires R
Missing item (2 items)						
Itemized Deductions IS	2008:1040C/V1	Open	Hall, Aimee	9/18/2009 4:02	Shred	True
Note to next year (1 item)						
Preparer (1 item)						
Review (1 item)						

## Smooth Access to Tax Guidance and a Familiar Interface Add Value Every Day

If tax content and guidance doesn't work well within a tax solution, valuable efficiency is lost, and risk and frustration increase.

ProSystem fx Tax is fully integrated with CCH's IntelliConnect®, the most powerful research platform available that gives you unprecedented access to the industry's best content, and TaxScripts™ TaxPro, the powerful tool that creates Disclosure Authorizations (DA) and IRS transcript requests in seconds, helping to ensure optimal efficiency and productivity on all returns.

Because the next generation of ProSystem fx Tax leverages the familiar technology, menus and functionality of Microsoft® Office applications, training and orientation are much simpler. CCH offers a wide range of training options for applications, methodologies and best practices that support consistency across the Suite.

Through its integrated system of intelligent tax workflow and preparation software, superior reference materials, exceptional tax guidance and outstanding training programs, CCH provides a one-stop shop that allows firms to thrive in this demanding industry.



All of the next generation ProSystem fx applications share a common database, with a single point of access for set up and administration.

For more information on ProSystem fx Tax call 1-800-PFX-9998 (1-800-739-9998) or visit [CCHGroup.com](http://CCHGroup.com)

*The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at [CCHGroup.com/Tax](http://CCHGroup.com/Tax). If you plan to use multiple ProSystem fx Suite products within the same system, call 1-800-PFX-9998 (1-800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.*

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