

# ProSystem fx® i-Mask

Maintain the security of your sensitive client information.

ProSystem fx® i-Mask is a Microsoft® Windows®-based application that helps you mask/redact confidential data from documents such as tax returns, W-2s, 1099s, broker statements, health claims, market research forms, and more. It lets you protect your clients' Social Security numbers and other defined fields such as Tax ID numbers in order to stay in compliance with IRS Regulation 7216. Masking confidential data with ProSystem fx i-Mask is simple, convenient, and effective.

## Optimal Security and Accuracy

CCH® has mastered the intricate details required to deliver an efficient, accurate, and secure solution for you. Make your compliance hassle-free:

- Effortlessly verify any content the application determines to be questionable.
- Easily locate masked data with an asterisk feature that highlights the masking.
- Clearly identify and read printed/typewritten data with i-Mask's powerful OCR technology.
- Conveniently launch ProSystem fx i-Mask right from your desktop — no Internet connection is required.
- Quickly create either a PDF or TIFF file with the masked SSN after the verification is complete. Launch ProSystem fx i-Mask right from your desktop — no Internet connection is required.

## Masking Sensitive Data is Easy

With the advancement of technology, data privacy has become an increasingly significant issue worldwide. However, using ProSystem fx i-Mask is an effortless and effective way to ensure that sensitive information remains secure. With ProSystem fx i-Mask, you can customize which information you want to mask, including:

- Federal Tax ID
- Telephone Number
- Name, Address, and ZIP Code
- Email ID
- Date of Birth
- Website URL
- Credit Card Number
- Social Security Number

You can even manually mask areas on a form that aren't identified by the system.

**1040 U.S. Individual Income Tax Return 2009**

Label: Taxpayer Smith  
 Home address: 123 Any Street, Anytown, AZ 55555  
 Social Security Number: 555-99-9999  
 Exemptions: Taxpayer Daughter (444-11-1111) daughter

**1040 U.S. Individual Income Tax Return 2009**

Label: Taxpayer Smith  
 Home address: \*\*\*\*\*  
 Social Security Number: \*\*\*\*\*  
 Exemptions: Taxpayer Daughter (\*\*\*\*\*), daughter

Ensure the security of your sensitive client information with ProSystem fx i-Mask.

Here are some of the ways ProSystem fx i-Mask ensures your client data security compliance:

- ProSystem fx i-Mask intelligently locates fields with sensitive client data and masks them automatically. There is no need to have templates created or to program for input document variations.
- ProSystem fx i-Mask has the ability to auto-detect the input file format (PDF or TIFF) and begin data masking without additional file classification and/or conversion. There is no need for additional plug-ins or new configuration settings, even when tax return documents are non-searchable PDFs.
- Take advantage of ProSystem fx i-Mask accuracy and the need for minimal manual intervention. ProSystem fx i-Mask displays a color-coded accuracy/confidence level. You can choose either manual verification for every masked field, or only fields where the confidence level falls below a predetermined level.
- ProSystem fx i-Mask automatically recognizes data to be masked in the federal tax return forms and detects different representations of this data, irrespective of its location in the same document. For instance, the SSN data represented in different formats such as 123-45-6789, 123.45.6789, etc., in a tax return document, is automatically detected and masked.
- The user interface lets you navigate between documents, navigate page-to-page within a document, or choose to navigate only between target/suspect fields in a document.
- You can also preview the complete document and re-validate the masked fields before finalizing. Or, choose to skip the previews and continue with the process.
- ProSystem fx i-Mask file output is a nonreversible process to rule out any possibility of data breach through manipulation of the masked output file.



## A Strong Partnership You Can Count On

ProSystem fx i-Mask is specially designed for safe outsourcing of sensitive, unstructured documents. Safe information-sharing is ensured by masking sensitive data first, fully protecting it before it leaves your firm's secure production environment.

You can also leverage your trusted partnership with CCH by using ProSystem fx® Outsource.

We'll coordinate the outsourcing workflow process for you, leaving you more time to serve your clients and build your practice. And, CCH can help you comply with IRS regulation 7216 via onshore services, or by leveraging ProSystem fx i-Mask to mask sensitive data if you elect to use offshore services.

To ensure the highest quality tax preparation service, our vendor maintains:

- A fully trained staff experienced with ProSystem fx® Tax.
- Extensive and ongoing training on all the latest federal and state tax laws and codes.
- A high-level final review process.
- The same comprehensive non-disclosure agreements you have with CCH, a Wolters Kluwer business.

## Training and Consulting Options to Fit Your Needs

CCH also offers valuable training, consulting and CPE to keep you ahead of the curve. From live training and consulting, to on-demand online learning, CCH provides the tools that everyone, from new hires to seasoned pros, needs to strengthen their abilities. Visit [CCHGroup.com/Training](http://CCHGroup.com/Training) to learn more.

For more information on  
ProSystem fx® i-Mask  
call 800-PFX-9998 (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/iMask](http://CCHGroup.com/iMask). If you plan to use multiple ProSystem fx Suite products within the same system, call 800-PFX-9998 (800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.*

*All trademarks and copyrights are property of their respective owners.*

Join us on     at [CCHGroup.com/Social](http://CCHGroup.com/Social)



**CCH**

a Wolters Kluwer business

800-PFX-9998 (800-739-9998)  
[CCHGroup.com](http://CCHGroup.com)