

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

*From the [April/May 2008 Review](#)
of Tax Compliance Suites*

As professional tax practices have moved toward paperless workflow processes, many have faced the challenge of retaining and managing their client workpapers in this new, digital environment. While some have resorted to workarounds that actually result in more work and data entry, an increasing number are finding SurePrep's DreamWorkpapers. With a centralized digital folder of all client documents and forms, DreamWorkpapers gives tax professionals a fully cross-referenced and indexed set of workpapers that speed the process of drilling down to source documents from leadsheets when reconciling return data, thereby streamlining the review process.

DreamWorkpapers is available to professional firms using SurePrep's preparation assistance services that enable firms to dramatically reduce preparation time, take on more clients, reduce time spent in the office, provide better client service and spend more time growing their practice without searching for hard-to-find experienced staff. SurePrep's staff of tax professionals handles the data entry for the returns the firm wants them to handle, then provides the firm with the DreamWorkpapers, which are essentially electronic binders that include all associated returns and documents, fully bookmarked and cross-linked for review. The services are provided in either a full outsource method, which includes total return preparation and provides the full DreamWorkpapers, or in a basic version, through which SurePrep's professionals manage only about 70 percent of the return preparation process, including entry of data from all common source documents.

The data from DreamWorkpapers is easily transferred into the firm's professional

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

processes and increasing the productivity of tax and accounting firms, including 1040SCAN, a system that uses optical character recognition technology to enable tax preparers to scan client source documents and have the data automatically flow to the correct forms and worksheets. 1040SCAN also provides an organized, bookmarked and referenced PDF of all of the source documents. Through its software applications and its on-shore and off-shore outsourcing services, SurePrep helped tax firms prepare more than 100,000 returns last year, enabling the practices to streamline their workflow processes. This, in turn, lets them handle more returns in less time, provide clients with excellent service and improves the work-life balance of the professionals at the firm. In short, SurePrep helps professionals work smarter, not harder.

Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved