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Internet solution, and tax practitioners can process an unlimited number of returns for a fixed monthly cost. The system is designed for high volume tax processing and intended as a standalone product. New for the current release are improvements to the electronic filing functionality and the addition of year-over-year comparative reports.

Steven M. Phelan • Apr. 21, 2014



Agile Tax is in its sophomore year as a tax solution. The program was built as an Internet solution, and tax practitioners can process an unlimited number of returns for a fixed monthly cost. The system is designed for high volume tax processing and intended as a standalone product. New for the current release are improvements to the electronic filing functionality and the addition of year-over-year comparative reports.

Core Product Functions/Features: 4.5 Stars

Agile Tax is an Internet-based solution and is accessible through any browser currently supporting Microsoft Silverlight technology. Upon accessing the software, users are directed to a dashboard divided into four easy-to-interpret components. The most recent client files accessed by the user are displayed along with a list of

commonly used program links. All product updates are displayed on the dashboard

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All federal and state returns are supported for individuals, while business, trust and non-profit returns are a little more limited on state supported filings. Currently, city and local returns are limited but will be added over the 2014 summer months.

Agile Tax is driven through forms data entry with a focus on the tax form itself or the actual source form documents. Most worksheet input screens mirror exactly what the source documents look like to create consistency in the data entry process. A list of all forms and source documents are prominently displayed as a folder navigation structure on the left part of the screen. Users also have the option to search for forms by form number, keyword or tax topic.

When users enter a ZIP code, the city and state fields are automatically populated. Enhancements have been made in the current release to include an employer identification database. As users enter data within the client file, many of the demographic fields are automatically populated. Currently this feature is isolated to each client file and is not available firm-wide, but it might still reduce the amount of data entry needed in some returns.

All individual returns go through an electronic filing check as the return is prepared. This diagnostic check helps prevent errors before the return is submitted for final filing. Any user accessing the client file after it has been electronically filed, will be prompted to prevent changes to the return. The return can also be marked as final to prevent any changes without a correct password. Upon acceptance of the electronically filed return, a notification email is automatically generated and sent to clients.

Integration: 3.25 Stars

Microsoft Excel is currently the only integration point supported inside Agile Tax. Users can import fixed asset and capital gain information, though the import will

need to be mapped. Newly added for the current release is the ability to group fixed

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Paperless Workflow: 4 Stars

Each tax form field within Agile Tax displays an arrow directing users to the correct data worksheet input screen. The data worksheet input screens also have an arrow directing users back to the correct form. This design greatly enhances the usability of the solution, especially for those switching to Agile Tax and for seasonal workers who may not be familiar with the product.

As data is entered throughout the return, diagnostics are generated in real time. If a form or data input screen is incomplete, a notification is generated next to the form link in the navigation tree. If there are multiple activities, such as multiple Schedule C's or multiple rental properties, the alerts are only generated for the activity that is incomplete. Clicking on the notification directs users to the diagnostic listing that details critical, information and electronic filing diagnostics.

Multiple browser windows may be used to display the printed return, dashboard, diagnostic alerts and portal information. Currently, users are unable to simultaneously view workpapers and return forms. This is a programing limitation that is under review for future releases.

Data input on each screen is color coded. General data entry is displayed as black text, data linked to worksheet input screens is displayed in blue, while any override information is displayed in red. Field notes are available but are informational only and cannot be assigned to a preparer or reviewer.

Remote Capabilities: 4.5 Stars

Agile Tax is a fully Internet based solution and offers all the amenities that accompany most SaaS solutions. All software updates are delivered automatically in the background and generally require no user intervention. Agile Tax is also fully

scalable to complement firms with multiple users. One unique aspect about the

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For a small monthly fee, the repository can easily be turned into a client portal. Activating the portal automatically generates an email to the client with directions for setting up user login information. Once activated, clients can view a list or download all uploaded return and workpaper information. Clients also have the opportunity to securely upload documents directly to the tax preparer. All information stored in the online repository may be downloaded to a local machine or server at any time.

Summary & Pricing

Agile Tax is an Internet-based tax solution intended as a standalone product for high volume tax professionals. Through the cloud, professionals can maintain the portability that is rapidly becoming commonplace. With a simple interface and pricing structure, sole practitioners and small firms are offered a flexible tax preparation solution. Pricing starts at \$100 per month for unlimited 1040 processing and includes all federal, state, e-filing and firm document storage for 1 preparer. Additional preparers may be added at \$50 per month with no minimum term commitments. Client portals may be activated at \$10 per month for 100 client portals. Per-return pricing is also available.

BEST FIRM FIT

Sole practitioners and small firms with a focus on high volume tax production

STRENGTHS

- Simple interface and pricing structure
- Online document storage included
- Easy scalability for seasonal workers

POTENTIAL WEAKNESSES

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