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on the number of client returns the professional will process.

Isaac M. O'Bannon • Apr. 23, 2016



From the **2016 Reviews of Professional Tax Preparation Systems**.

Best Firm Fit: Intuit Tax Online is a best fit for very small firms and sole practitioners, offering a cloud-based system that can be used to prepare returns for all taxable entities.

Strengths

- Completely web-based system offers convenience of anytime access and no maintenance
- Intuitive interface and quick startup functions

- Free mobile app enhances system, giving iPhone users access to client

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Intuit Tax Online offers a completely web-based and app-enhanced solution for professional tax compliance. The system is available via per-return pricing level based on the number of client returns the professional will process. The system features unlimited e-filing, fast data entry screens, paperless W-2 and Sch. D import, integrated online invoicing, e-signatures and diagnostics.

Core Product Functions/Features: 4.25 Stars

Intuit Tax Online was designed for online use and opens within a traditional web browser, while many of the functions and client status information are also available via an app. The program opens to the Tax Hub window, which follows the same general design as the current version of QuickBooks Online and offers overviews of all returns by federal form type, with information on which are in progress, transmitted and accepted. Users can also sort or search the master client list.

The system offers a simple navigation menu with options for moving between the tax prep system, client management functions, the E-File Dashboard, chat support and the new Intuit Link tool, which gives firms an automated way to determine what data the firm still needs from clients, alerts the clients, and offers a secure and easy portal for them to send to the firm.

Intuit Tax Online has more than 5,600 forms and can be used to prepare forms 1040, 1041, 1065, 1120, 1120s and 990. The system guides Within returns, data entry fields follow the general structure of the form, and the system offers simple selection lists and buttons for items such as filing status, Box 12 selections, and quick MFJ vs. MFS comparisons. Return data input is divided into sections for general information, payments, income, deductions, credits, taxes, other, state and local and miscellaneous forms. Intuit Tax Online automatically runs diagnostics when the

preparer uses the Check Return feature, and provides suggestions that can help

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Intuit Tax Online offers direct integration with QuickBooks Online Accountant, letting users easily create returns by transferring trial balance information directly from a business' QBO files. Several in-program integrations also speed workflow, including the ability to import W-2 data directly from payroll service providers, a Sch. D import utility, e-signature capabilities, and the option to create PDF copies of client returns.

Paperless Workflow: 4.5 Stars

The new Intuit Link feature offers good client interaction features that can reduce paper-based processes. With the system, preparers can send clients electronic requests for documents and information, making client engagements more digital, and less difficult. After the client gives permission, the system also connects to financial institutions and their payroll provider to sync in their data, which reduces not only manual entry, but also errors. As noted previously, the system also offers e-signature capabilities, while returns can be output to PDF format.

Remote Capabilities: 4.75 Stars

As a completely web-based system, Intuit Tax Online can be used from any desktop, laptop or tablet with full internet access. The companion mobile app (Apple and Android) offers access to data, checking e-file status, and responding to client communications. Intuit maintains the program on its secure servers and all client and return data is automatically backed up.

Help/Support: 4 Stars

The help tools in Intuit Tax Online include FAQs, an online user community, live chat assistance, and a searchable database that includes trending topics, Affordable Care Act information, e-Signature topics and general categories. The system does not

offer direct access to line-by-line form instructions, which would be helpful. Intuit

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per return. For business filings, the cost of prepurchasing 20 returns is \$39.95 per return. These costs include e-filing of federal and all associated states.

2016 Overall Rating: 4.25 Stars

Software • Taxes

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