the Sept. 2008 Feature on *Scan/Fill/Populate Systems*

Copanion is a new entry into the space, having debuted GruntWorx last fall. The fully web-based workflow management system provides scanning, identification
and bookmarking of all client documents into a set of digital workpapers that enables users to quickly jump to any document when reviewing a return or performing
other tasks. The system also allows the addition of tickmarks and notes from multiple users, allowing firms to keep much of their traditional processes intact. In its first year (TY2007), professional users at firms ranging from the Big 4 to small practices processed more than 350,000 client documents using the system.

In time for next tax season, Copanion is adding automatic tax return population features to the Pro version of GruntWorx, making it one of the few products on the market that is not from a tax software vendor and that integrates with multiple systems. For the 2008 tax season, GruntWorx Pro will automatically export data from scanned tax documents into GoSystem Tax RS. Support for additional
tax preparation software packages will be determined and announced later in the 2008 tax year.

Among the more notable features of GruntWorx are several patent-pending technological
aspects, including biometric recognition of forms. This feature in particular, which is similar to the technique used by law enforcement for analyzing fingerprints,

gives the system the ability to recognize the most minute differences between

improves the quality of scanned input. All of this processing power gives the system extraordinary accuracy, but requires significant infrastructure, which Copanion maintains at its secure facilities.

The actual user process is very simple, and the initial functions take only three steps:

1. Select a client,
2. Scan client documents or add documents from previously scanned PDF files, and
3. Upload the data through the secure GruntWorx system.

GruntWorx then processes the files and identifies, classifies, sorts and compiles the bookmarked PDF workpapers. When processing is complete (usually in one or two hours), the program notifies the user, who then securely downloads the PDF. Tax professionals can use the bookmarked PDF to quickly find and enter tax data in any tax software. GruntWorx Pro provides the additional capability to extract data from the scanned tax documents and automatically populate the data in tax preparation software. The extracted data can be verified for accuracy against the scanned source documents in the bookmarked PDF.

All data is secure, remains in the United States and is never accessible to outside eyes, making the system fully compliant with IRC 7216. Pricing for the scan & organize function is very affordable at $1 to $2 per client based on volume, regardless of the actual number of documents and pages scanned. Pricing for GruntWorx Pro for GoSystem Tax RS will have a list price of $50 per return. "Automatic population of client data can save significant administrative time, but there are many challenges that must be overcome to develop a reliable system," said Ed Jennings, Copanion's vice president of sales and marketing.

"There can be thousands of variations of even the most basic forms, depending

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