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Document Automation

GruntWorx is now offered in Organize and Pro versions, with both options providing automated document identification, workpaper organization, data extraction and review processes. As a web-based system, GruntWorx is used for scanning in client documents and uploading them through a secure portal. The backend of the program then does all of the identification and organization work, and notifies users when the resulting files are ready.

Regardless of the order in which documents are scanned, GruntWorx products organize them consistently into bookmarked and linked PDF workpapers, coversheet and summary of return data that users can import into many tax programs and client data organizers. GruntWorx Pro adds the benefit of direct integration with Thomson Reuters' GoSystem RS, and Copanion anticipates adding integration with additional tax systems in the near future.

One of the key advantages to the web-based GruntWorx system is that it continually gets smarter and faster as a tax season progresses. Since the program is housed on Copanion's secure U.S. servers, it learns from forms that have been scanned by other users. So even if a form is obscure, if it has been scanned by even one other professional at another firm, it will be almost instantly recognized by the program when a different user scans the same form. GruntWorx Pro won a 2009 Innovation Award and the original GruntWorx received one in 2008.

Forms Identified: Virtually all versions of forms 1099, 1098, W-2, K-1, 2439, SSA, etc., as well as combined brokerage statements, the company noted, from all brokers.

Organized PDF Workpaper Compilation: Yes

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