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Document Automation

With more than four tax seasons behind it, SurePrep is essentially the inventor of automated tax document recognition and electronic workpaper compilation. The company offers 1040SCAN in a variety of versions that let practices determine how much of the compilation, organization and data entry they wish to perform themselves, on a client-by-client basis.

The core features of the 1040SCAN system are in the automatically generated electronic workpapers that it produces from client documents scanned in by a user. These workpapers are provided as an organized, fully bookmarked and linked PDF that allows users to quickly move between documents during return review processes.

The program also provides OCR functions that enable it to identify virtually all federal tax forms, brokerage statements, grantor letters and other items, as well as many state-specific client tax documents. 1040SCAN can then pull the data from these documents and automatically route them to client returns in various tax compliance systems. It is the only tax document automation program that integrates with the client data organizers or returns in multiple professional tax programs, including GoSystem Tax RS, ProSystem *fx* Tax and Lacerte. 1040SCAN received an Innovation Award in 2007.

Forms Identified: All Federal Organizer pages. Virtually all versions of forms W-2, 1099 and 1098, as well as 5498, 8283, Schedule H, K-1 1065, K-1 1120s and K-1 1041. Also, brokerage statements from more than 150 firms, grantor letters and many charitable contribution receipts.

Organized PDF Workpaper Compilation: Yes

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