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SurePrep — 1040SCAN Pro; 1040SCAN Organize

800-805-8582

www.sureprep.com

Best Fit: Professional firms seeking an automated workpaper solution, who have complex clients, or clients who often have large numbers of source documents, and where there may be multiple professionals involved in preparation, review and final sign-off.

Strengths

- The SPbinder tool has strong features for organizing and annotating PDFs, Word documents, Excel files and Outlook emails
- Multiple options for firms with varying client complexity, allowing them to use 1040SCAN ORGANIZE, 1040SCAN TRADES or 1040SCAN PRO, as necessary
- System allows firm customization to fit its workflow practices
- Fastest turnaround time compared to web-based systems for creating automated PDF workpapers (last tax season, it averaged under 25 minutes)

Potential Limitations

- Multiple options and extensive workflow features are positives, but may require additional time to grow familiar with
- The organized PDF workpapers the system creates are in a proprietary format that does not allow modified using other PDF editing applications, but users can also create a traditional PDF.

SurePrep pretty much invented the space known as tax workflow automation when 10 years ago they started offering tax professionals scan and organize solutions. Since then, the company has expanded its offerings to include automatic population

features that work with many popular professional tax systems, as well as U.S.-based

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Core Product Functions/Features: 5 Stars

The 1040SCAN system is web-based, allowing users to access the core OCR and data from virtually anywhere and relieving the firm from maintaining system files. SurePrep offers four products in the tax workpaper, workflow and automation area. SPbinder is the core electronic binder and workflow utility, and is designed for organizing electronic workpapers and managing tax preparation processes within a firm. Its features enable creation of annotations, multiple levels of sign-offs, and dynamic workpaper referencing and linking. SPbinder allows users to simply drag and drop files to be organized, and users can have different pages of an Excel spreadsheet placed into different areas of organized file. The system also cross references workpapers with hyperlinks, and offers additional functions not available in Adobe Acrobat. The end products are a set of bookmarked PDF workpapers containing the source documents.

The 1040SCAN ORGANIZE system uses optical character recognition technology to identify the type of forms that have been uploaded by the user, and then uses that to bookmark and organize standard tax documents. The 1040SCAN PRO product is the auto-populate system, allowing the extraction of specific field data from client source documents into supported professional tax systems, and includes tools to ensure accuracy and prevent duplication.

The 1040SCAN TRADES system is focused on finding and extracting capital gain and loss details from client brokerage statements, and then posting them to an Excel spreadsheet and to Schedule D of supported tax software. 1040SCAN TRADES can recognize and extract capital gain and loss detail from more than 325 recognized brokerage statements. The Review Wizard provides a method for verification of the details before populating the data into a client return.

Paperless Workflow: 4.75 Stars

The interface for data-entry and verification is built into the 1040SCAN application,

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that client for future years. Once a client's source documents have been uploaded by the firm, processed by 1040SCAN, and then received back at the firm, users can either create an SPbinder for the engagement or create a bookmarked PDF document.

Integration: 4.5 Stars

1040SCAN PRO can find and extract client data from forms, then populate that data into client the appropriate forms and schedules of a client return in GoSystem Tax, Global *fx*, Lacerte, ProSystem *fx* Tax and UltraTax CS. The 1040SCAN TRADES system also integrates with these tax systems, as well as any other that can import Schedule D transactions from an Excel file. The 1040SCAN ORGANIZE system, which creates the organized, bookmarked PDF workpapers, can be used alongside any tax program.

Help/Support/Training: 4.75 Stars

The initial installation and setup functions are somewhat involved, but necessary to get the full benefit of the integration between the firm's tax system and SurePrep. The program includes step-by-step guides for all of the processes, including tutorials and screenshots for common functions, and options for setting firm preferences for workflow.

SurePrep's website includes a support resource center where users can access webinars, whitepapers, CPE-eligible training and the company's blog. Several training videos are also on the website, giving how-tos on system functions. The company offers optional workflow and implementation consultations. Technical support is included with system pricing.

Summary & Pricing

SurePrep offers several different options for firms, which can help them use workflow solutions as they might best apply to their practice. The core components,

particularly the SPbinder and PDF output functions are comprehensive and flexible,

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and includes the SPbinder and ORGANIZE programs. The comprehensive 1040SCAN PRO system, which includes the other three, costs \$30 per engagement. SurePrep offers discounted rates to firms that make early-season or multi-year purchase commitments.

2013 Overall Rating: 4.75 Stars

Software • Technology

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