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(866) 676-9674

Accountants.intuit.com/tax/online

From the [May 2013 review](#) of Professional Tax Preparation systems.

Best Firm Fit

- Startup firms who are either short on cash or unsure how many returns they expect to prepare.
- Firms who need built-in online collaboration or work with part-time preparers in remote locations.

Strengths

- ITO has no “per user” charges for additional preparers and no additional fees for state returns or e-filing.
- No installation or updates, as product runs completely in a web browser
- Mobile app for checking filing status and client information (iOS and Android)
- Data files are backed up by Intuit (the maker of Lacerte and ProSeries) and the primary data files are not stored on the remote computer
- QuickBooks ProAdvisor program members receive five free 1040's and 10% off of all ITO tax return bundles

Potential Limitations

- The product does not have integrations with any document management systems or small business accounting applications.

- Intuit does not offer a plan with an unlimited number of returns, and high-volume

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for federal and all states. This application has evolved significantly over the last few years, and the user interface is easier to navigate than earlier versions. For tax year 2012, ITO supports bank products from Refund Advantage, including electronic refund checks and electronic refund deposit.

ITO uses a forms-based input approach, although users can view tax forms on the screen and enter override amounts if desired. Common individual calculations are supported, including AMT, non-resident returns, MFJ vs. MFS, household employment taxes, and carryovers. Integrations to other applications are limited, and the application lacks tools for tax planning, K-1 import/export, and linkage of parent/child for Kiddie tax. Users cannot import data from QuickBooks

The product is supported on both Windows and MacOS. Intuit recommends that users have a dual core processor, 2 GB or more of RAM, Windows XP, Vista, or 7, or MacOS 10.1 or higher, as well as a 1.5 Mbps or faster internet connection. Users can access the application using Safari, Firefox, Chrome, or Internet Explorer 8, and must have the Adobe Flash Player installed.

Intuit offers a mobile application for iOS and Android which allows users to view summary client information and check e-file status. Users can also dial taxpayers from their mobile phone directly from within the application using the numbers stored in the client's ITO profile. There are no additional charges (beyond the base price) for access by multiple users, mobile access, state returns, or electronic filing.

Preparers and reviewers can assign a status to a return within the application, make notes, search for clients, and copy or rename the return if necessary. The application has a comprehensive diagnostics feature included, and users can review input sheets or forms using their web browser.

Support is available on discussion boards, via chat, and via telephone. The company has a robust knowledge base, including a getting started guide, videos, and tutorials.

Telephone support during tax season is from 6:00 AM to 6:00 PM PT on weekdays,

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Intuit’s ProAdvisor program receive five free ITO returns, and receive a discount when purchasing additional returns.

2013 Ratings:

Intuit Tax Online	
Core Product Functions/Features	4.5
Paperless Workflow	3.5
Integration	3.0
Help/Support	4.75
Overall Rating	4.0

Software

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