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Features integrate to import client tax returns in many professional tax systems, and the company ...

Isaac M. O'Bannon • Nov. 16, 2015



From the **2015 Review of Tax Document Automation Systems**.

Best Fit: Tax firms with complex clients who want a comprehensive system that will handle large volumes of clients and tax documents, providing a digital PDF workbook that is editable and offers additional features. The system also offers excellent tools for multi-preparer returns, with preparation, review and final sign-off steps.

Strengths

- The program includes a variety of options for firms clients of any complexity, with 1040SCAN ORGANIZE, 1040SCAN TRADES and 1040SCAN PRO offering a wide choice of tools and capabilities
- Firms have the option of auto-population of tax returns (GoSystem Tax, Global fx, Lacerte, ProSystem fx Tax and UltraTax CS)
- The SPbinder tool is exceptionally function, organizing and annotating PDFs, Word documents, Excel files and Outlook emails
- SurePrep includes many firm customization options for workflow practices
- Fast turnaround time from scanned-in documents to complete PDF workpapers

Potential Limitations

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the company offers U.S.-based tax return outsourcing (with credentialed CPAs performing review functions in their California offices). This allows firms to ramp up their tax clients without having to increase staff or overhead.

Core Product Functions/Features: 5 Stars

There are four tax workflow modules available through the SurePrep system, The secure, web-based 1040SCAN system is the core, providing a system for users to scan in client documents, which are then compiled by the 1040SCAN ORGANIZE SYSTEM into digital client tax PDF workpapers that are bookmarked and organized in standard return order.

The system uses optical character recognition (OCR) to identify the client documents. With the addition of 1040SCAN PRO, the system can also extract the data from each line of forms that have been scanned in, and the data can be routed into client tax returns in GoSystem Tax, Global *fx*, Lacerte, ProSystem *fx* Tax, and UltraTax CS. Data verification tools help ensure accuracy. The primary 1040SCAN interface for data-entry and verification uses input screens in a similar format as the source document. Alternatively, firms can import data straight to their tax system and review data within that system.

The digitized return is then prepared and reviewed within SurePrep's paperless workpaper system SPbinder, which includes the ability to annotate and edit the PDFs, create links between documents, drag and drop reordering of documents, has sign-off sheets, can help identify missing client documents and helps standardize workflow.

SurePrep also offers a system designed for managing client brokerage statements, extracting sale and capital gains information onto an Excel spreadsheet and, when

verified, into a client's Schedule D. The system recognizes brokerage statements from

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maximize tax engagement efficiency. SPbinder stores a client's source documents and workpapers and allows reorganization, pagination, bookmarking, interactive linking, and annotation of PDF and Excel files.

Integration: 4.5 Stars

The system creates both a proprietary format for client workpapers as well as Adobe PDF documents, but with SPbinder, users can have advanced editing functions without needing an Adobe Acrobat license. The 1040SCAN system can extract data from client source documents and populate the information into client tax returns in GoSystem Tax, Global *fx*, Lacerte, ProSystem *fx* Tax and UltraTax CS. A full list of forms that 1040SCAN can recognize and extract data from is at <http://corp.sureprep.com/faq/> (Document Coverage List).

Help/Support/Training: 4.75 Stars

The program offers extensive workflow organization features, particularly when using SPbinder, which may require some assistance during initial setup. The company offers implementation and function guides, as well as tutorials, screenshots and demo videos. Online help resources include a resource center with webinars, whitepapers, videos, how-tos, and CPE-eligible training options. Support is included with system pricing.

Summary

SurePrep is comprehensive and offers several different options for tax season, letting firms use as much or as little of the options as they need. The system can handle the most complex returns, and includes enhanced practice workflow features that help to further streamline tax preparation, review and sign-off processes. It includes integration with GoSystem Tax, Global *fx*, Lacerte, ProSystem *fx* Tax and UltraTax CS for automatic population of client tax forms.

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