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**PRODUCT & SERVICE GUIDE**

# 2019 Review of ProConnect Tax Online from Intuit

ProConnect Tax Online is best suited for smaller firms that process less than 300 tax forms per year. ProConnect Tax Online supports both individual and business returns through an online platform that can be accessed from PCs, Macs, and smart phones

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**Mary Girsch-Bock** • Jun. 11, 2019



## **ProConnect Tax Online**

**Intuit**

<https://proconnect.intuit.com/tax-online>

From the 2019 reviews of professional tax preparation systems.

ProConnect Tax Online is best suited for smaller firms that process less than 300 tax forms per year. ProConnect Tax Online supports both individual and business returns through an online platform that can be accessed from PCs, Macs, and smart phones and tablets.

ProConnect Tax Online offers an intuitive user interface with a variety of features and functions designed to streamline the tax preparation process, including a split view screen, which allows users to view data entry fields and tax forms side by side. Also available is a summary view, which allows users to view a summary of current and prior year taxes for each client. For those carrying over tax return data from previous years, the Batch Processing feature can save time and data entry by allowing users to pull data from multiple returns simultaneously. In addition, ProConnect Tax

Online users can make multi-year comparisons for all returns, and build up to three years of case scenarios as needed.

ProConnect Tax Online supports more than 5,600 forms and schedules for forms 1040, 1120, 1120S, 1065, 1041, 990, and 709. ProConnect Tax Online's data entry fields mirror the tax form currently being processed, with the product offering more than 18,000 automated calculations and 21,000 diagnostics to help ensure both speed and accuracy. E-filing is supported for both federal and state forms, and the e-file dashboard, mentioned earlier, provides users with a quick overview of the status of all e-filed returns including current filing status as well as form rejections.

Intuit Link included with ProConnect Tax Online, works as a portal, allowing firms and clients to easily share documents and other financial data. Users simply invite clients to sign up for Link, which is available at no cost. Once signed up, clients can upload documents directly to the portal. Users can also request documents from clients via Link, which offers the ability to track the status of requested documents. Using Link, users can also create a default tax organizer for their firm, along with a custom engagement letter for each client, along with a document checklist. Link also integrates with eSignature from DocuSign, allowing clients to electronically sign confidential documents such as the 8879 form. The product also contains an auto-reminder feature which will remind clients periodically if the form is not signed and returned promptly.

Integration with QuickBooks Online Accountant allows users to share data between applications. The product also integrates with third-party applications such as e-Signature, mentioned earlier and Pay-by-Refund, which allows clients to pay tax preparation fees directly from their refund.

Users can also import financial documents such as W-2's, K-1 forms, and Schedule D data directly from Excel into the application with the ability to import documents such as 1099-INT, 1099-DIV, 1098, 1099-T, 1099-R, and 1099-B expected in the near future. Users can also choose to import data using a scanner or mobile device, or simply download the data from the appropriate provider.

ProConnect Tax Online offers numerous support options and resources for users including access to the Easy Start option, which guides new users through initial application setup and data conversion. A searchable knowledgebase is available, and users can access the Getting Started option that provides numerous resources for new system users. Alerts and Trending Topics are also available, as are top FAQs. Users

can contact support via telephone or chat, with all support included in the cost of the product.

Pro-Connect Tax Online is best suited for smaller firms that process less than 300 forms annually. Pricing strategies are different for individual returns and business returns, and firms should be aware that ProConnect Tax Online uses a per-return pricing strategy which can quickly become expensive for those processing a high number of returns.

Pricing includes federal, state, multi-state, and municipal e-filing, with pricing per return. For 1040 filing, 1-9 returns are \$44.98 each; 10-49 returns are \$39.98 each; and 50-99 returns \$34.98 each, with special pricing available for more than 100 returns. Business return pricing is currently \$56.23 each for 1-9 returns; \$49.73 each for 10-49 returns, and \$43.73 each for 50-99 returns, with special pricing available for more than 100 returns. Business pricing includes preparation of forms 1041, 1065, 1120, 1120S, 990, and 709. Those interested can download ProConnect Tax Online at no cost, only paying when forms are filed.

## **2019 Rating – 4.25 Stars**

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