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returns through an online platform that can be accessed from PCs, Macs, and ...

Mary Girsch-Bock • Jun. 18, 2020

ProConnect Tax Online – Intuit

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

From the 2020 reviews of professional tax preparation systems.

ProConnect Tax Online is best suited for smaller firms that process fewer 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

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PDF Organizer offered in ProConnect is now part of Link, and tax preparers can cut down on paper by allowing their clients to sign forms electronically using the e-Signature feature (powered by DocuSign, for an extra charge).

In addition, the 2019 tax year version contains navigational enhancements and improved loading times for all pages. For those seeking additional help and support enhancements, the 2019 version of ProConnect Tax Online now includes Point-of-Need Guidance for answers to frequently asked questions, as well as enhanced help features located inside the application, allowing users to search for answers without leaving their workflow. Also new is the option to create a tax plan using prior year returns, creating up to three tax scenarios per year, as well as the ability to make multi-year comparisons.

Product Features

A vertical menu to the left of the screen offers quick access to all product features, and the Tax Returns screen provides a nice overview of all returns sorted however you like, with the status of each return included in the overview.

Along with an intuitive user interface, ProConnect Tax Online offers a variety of user tools to streamline system navigation and form preparation including a search option, a split view, where tax forms can be viewed on a separate screen while you are entering data, and some fields on tax forms include a jump to input option for quick data entry. For firms that process a high number of returns, a batch processing option can be used to quickly carry over prior year data to the current tax year.

ProConnect Tax Online supports more than 5,700 forms and schedules for forms 1040, 1120, 1120S, 1065, 1041, 990, and 709 as well as major forms for all states. ProConnect Tax Online offers more than 18,000 automated calculations and 20,000 diagnostics that can be easily accessed when preparing forms. ProConnect supports

e-filing for both federal and state forms, and the e-file dashboard provides a quick

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ProConnect Tax Online offers seamless integration with QuickBooks Online Accountant, making it easy to share data between the two applications.

Users can also import financial documents such as W-2's, K-1 forms, and Schedule D data using data scan or a mobile device. Forms available include 1099-INT, 1099-DIV, 1098, 1098-T, 1099-T, 1099-R, 1099-MISC now available.

ProConnect Tax Online includes product help and support options, with users able to request help without leaving the screen on which they are working. New users will appreciate the product tour offered on the Welcome screen, and the How-To's offers tips and training options available for all ProConnect users. The Easy Start Checklist helps guides new users through the product setup process, and users can contact support via telephone or chat, with all support included in the price of the application.

Pricing is based on volume. Contact Intuit directly for the pricing program that best suits your firm. Note that interested parties can download ProConnect Tax Online at no cost, only paying when forms are printed, downloaded, or filed.

2020 Rating – 4.25 Stars

Strengths:

- Intuitive user interface
- Integrates with QuickBooks Accountant
- Cloud-based
- Mobile functionality

Potential Limitations:

- Onscreen support is inferior to that found in other Intuit tax products

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