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From the 2020 review of Tax Document Automation systems.

SurePrep 1040SCAN is a scanning application that can also be used with SPbinder or TaxCaddy, also from SurePrep, and offers integration with numerous third-party tax preparation applications such as CCH Axcess Tax, CCH ProSystem fx Tax, GoSystem Tax RS, Lacerte, and UltraTax CS. SurePrep 1040SCAN is completely web-based with four plans available: 1040SCAN ORGANIZE, 1040SCAN Pro, 1040SCANverify, and 1040SCANverify+.

Core Product Functions/Features: 5 Stars

All four versions of 1040SCAN include complete TaxCaddy and SPbinder integration, the ability to bookmark and organize documents, and the ability to identify missing source documents. 1040SCAN PRO also includes the new Auto-Verification feature, can export all standard document data to tax software, and prevents duplicate data from being exported. 1040SCANverify offers a combination of scanning software and service, verifying source document data prior to exporting to tax software. Finally, 1040SCANverify+ provides all services included in the other plans along with the ability to identify, analyze, and reference all accepted documents.

1040SCAN auto-verifies native PDFs including those downloaded from financial institutions such as a 1099 or a W-2 from a payroll provider. The auto-verification feature allows these documents to be automatically verified without the need for human verification. Users can easily submit a job for processing at any time with the option to add additional documents to the original job. Processing times can vary once a job has been submitted, with the average processing time for a return with 50 pages of source documents taking around 30 minutes to process, larger returns take a bit longer.

Paperless Workflow: 5 Stars

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as TaxCaddy and SPbinder. TaxCaddy works with existing tax preparation software applications including CCH Axcess Tax, CCH ProSystem fx Tax, GoSystem Tax RS, Lacerte, and UltraTax to create a tailored questionnaire and document request list that is completely mobile. In addition, 1040SCAN integrates with Microsoft Excel and Word, and well as Outlook. The inclusion of SPbinder in all 1040SCAN plans means all users will have access to a set of organized workpapers with a standardized index that is designed to follow the flow of a tax return. SPbinder can also be purchased as a standalone application. Integration options vary from plan to plan. 1040SCAN ORGANIZE does not offer integration with any tax applications; 1040SCAN PRO and 1040SCANverify both integrate with CCH Axcess Tax, CCH ProSystem fx Tax, GoSystem Tax RS, Lacerte, and UltraTax CS, while 1040SCANverify+ is only available for CCH Axcess Tax and GoSystem Tax RS. SurePrep also offers tax return preparation outsourcing through their Outsource application, with both onshore and offshore outsourcing options available, with tax preparers using the same third-party tax preparation applications listed above.

Help/Support/Training: 4.75 Stars

SurePrep customers have access to a variety of product support options, with unlimited email, live chat, telephone, and GoToMeeting support available at no additional cost to current users. SurePrep does require training for all new customers; creating a customized training plan for each new customer. Training consists of an introductory meeting followed by tutorial videos, hands-on exercises, and progress monitoring. In addition, SurePrep offers other user resources, including webinars and videos as well as access to whitepapers.

Summary & Pricing

1040SCAN from SurePrep is currently offered in four versions: 1040SCAN ORGANIZE, which offers source document organization; 1040SCAN PRO, which is a scan and

populate application, that automatically bookmarks, organizes, and exports data

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1040SCAN Pricing is based on the number of returns processed. Those interested in other SurePrep applications such as TaxCaddy, SPbinder, or Outsource should contact SurePrep directly for additional information on each application as well as current pricing.

2020 Overall Rating: 5 Stars

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