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returns.

Mary Girsch-Bock • Aug. 17, 2020



No one can disagree that preparing taxes requires a lot of documents. In years past, you could always tell when it was tax season by the number of documents on an accountant's desk. Those documents would need to be organized, scanned, and used in preparing a client's return. Once the return had been completed, the organized documents then had to be filed away for future access.

The good news is that tax document automation programs can help to reduce many of these time-consuming tasks. They offer time-saving features such as automated scanning, document organization and document management capability. In many

cases, these applications can also significantly reduce or even eliminate the amount

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For instance, tax document organization applications can take a large stack of work papers and organize them into a single digital binder, which includes bookmarks and labels for all relevant documents, while also standardizing the documents in each binder that's created.

Some of the applications offer the ability to auto-populate tax returns, reducing or eliminating the need for time-consuming data entry. Most of the applications are able to recognize common tax source documents such as W-2s, 1099s, K-1s, and brokerage statements, and are able to review data for accuracy.

The tax document automation products reviewed in this issue vary, with some better suited to larger firms, while others work better for smaller firms processing fewer returns. Some of the applications are part of a specific tax preparation software, while others are designed as stand-alone applications that can integrate with other tax preparation products.

The products reviewed in this issue include:

- [1040SCAN by SurePrep](#)
- [GruntWorx, LLC](#)
- [Lacerte and ProSeries Scan and Import](#)
- [Thomson Reuters – Source Document Processing](#)
- [Wolters Kluwer – CCH, ProSystem fx Scan](#)

	Cloud-based Accessibility	Uses OCR Technology	Organizes Scanned Documents Automatically	Imports Common Tax Forms	Imports Brokerage Statements	Auto-Verification Available	Auto-Population of Forms in Tax Software	Creates Digital Binder	Ability to Edit Binder	Data Review Option Available	Integrates with Tax Preparation Software	Support and Training Options	2020 OVERALL RATING
CCH PROSYSTEM FX SCAN	X	X	X	X	X		X	X	X	X	X	X	★ 4.75
GRUNTWORX	X	X	X	X	X	X	X	X	X	X	X	X	★ 5
INTUIT LACERTE/PROSERIES SCAN & IMPORT		X		X	X		X	X	X	X	X	X	★ 4.25
SUREPREP 1040 SCAN	X	X	X	X*	X*	X	X	X	X	X	X	X	★ 5
THOMSON REUTERS SOURCE DOCUMENT PROCESSING	X	X		X	X		X	X	X	X	X**	X	★ 4.5

* DONE THROUGH TAX CADEY
** ONLY THOMSON REUTERS APPLICATIONS

(Click to enlarge chart.)

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well. So, spend a few minutes reading the reviews, download a few demos to try out for yourself, and maybe come tax season, you can leave the office on time.

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