returns through an anytime, anywhere platform. New for the current release is a streamlined interface and a new mobile app that may be downloaded by clients.

Steven M. Phelan • Apr. 21, 2014

Intuit Tax Online is an Internet-based tax solution with a fixed, all-inclusive pricing structure. Intuit Tax Online provides a streamlined interface to process simple returns through an anytime, anywhere platform. New for the current release is a streamlined interface and a new mobile app that may be downloaded by clients.

Core Product Functions/Features: 4 Stars

Inuit Tax Online is offered in two products tiers – Intuit Tax Online Pro and Intuit Tax Online Plus. There is no difference in product functionality between the two, but Intuit Tax Online Plus includes some Microsoft Excel import features, more firm

branding customization and lower per-return pricing, but increased return

workspaces. The input return workspace lists out all the data input worksheet options, the check return workspace shows the federal and state form view of the return along with any diagnostic information and the file return workspace allows users to check for electronic filing diagnostics and print the return for archive and/or review.

The recently reprogrammed interface coincides with the newly released QuickBooks Online interface. There are a number of streamlined design elements that are shared between the two. Both products may be accessed through a single login combination.

For now, Intuit Tax Online is open for testing for all users. All that is required to access the software is a free login account. Users are able to input, calculate and review the return, but are unable to print or electronically file without purchasing the return or a bundle of returns.

Intuit Tax Online is not full featured just yet, but does support over 5,600 form filings. Most individual federal and state returns are represented. Recently added is the ability to process complete 990 federal tax returns for non-profits. Tax return types not currently supported are 706, 709 and 5500.

A unique feature included in Intuit Tax Online is the ability to invite other users, either inside or outside the firm, and attach them to the firm. No additional costs are incurred and a firm may have as many users as they need. Firms should be cautioned, however, that users cannot be limited to specific returns and few audit trails are currently in place.

Integration: 3.25 Stars

Intuit Tax Online currently only integrates through QuickBooks Online Accountant client files and throug3.5++4.5h a limited Microsoft Excel import function. The

QuickBooks Online Accountant client files can be directly imported into Intuit Tax

future year enhancements.

Paperless Workflow: 3.5 Stars

As an Internet-based solution, Intuit Tax Online supports multiple tabs, but the management of this is left up to the user. Data input worksheets and the end result tax forms may be simultaneously viewed, however the user must manually separate the tabs and move to the appropriate monitors.

Diagnostics are provided within the system and are broken down into critical diagnostics and suggestions, which are simple information diagnostics. Electronic filing diagnostics are done prior to electronically filing the return and may not be run until all critical diagnostics are cleared. Most diagnostics are dynamically linked to the underlying data input worksheets and tax forms.

Printing returns is currently centered on PDF files. Upon completion of the return, reviewers may preview the return in PDF. A current limitation is the inability to only view or print certain pages within the return. The Intuit Tax Online programming team is currently working to add this function later in the year.

Remote Capabilities: 4.5 Stars

Intuit Tax Online is only offered as an Internet-based solution and offers all the amenities that typically accompany most SaaS solutions. All data is backed up daily across multiple servers and bank-level encryption maintained by Intuit is currently implemented to keep data secure. All software updates and feature additions are added in the background and generally require no user intervention.

Access to the software is traditionally done through the desktop browser and all modern Internet browsers are currently supported. Intuit also offers a mobile application for Android and Apple devices which provides access to client tax return

summary information, electronic filing status and securely communicate with

Intuit Tax Online is intended for sole-practitioners, but is scalable to small local firms with up to around 10 employees. Intuit Tax Online is a good fit for sole-practitioners and small firms looking for an all-inclusive pricing model and true anytime, anywhere access. Pricing is structured in bundles of returns and 50 1040 returns may be processed for $499, which includes all federal and state compliance filings as well as electronic filing fees. Returns may be purchased individually as well. Additional detailed pricing for business returns and all bundles is listed on the Intuit Tax Online product webpage.

BEST FIRM FIT

Sole-practitioners and small firms looking for fixed product pricing and the ability to process simple returns through an anytime, anywhere platform

STRENGTHS

- Multiple options to access solution, desktop and mobile
- Can process and review return without payment, but cannot print or file
- No limit to the number of users inside the firm

POTENTIAL WEAKNESSES

- Integration points are currently limited
- No available onscreen help
- No available data trail to determine source of numbers on returns
- Printing the return is currently all or none, but an update is coming to remedy this

2014 Overall Rating: 3.75 Stars

Income Tax • Software

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