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**Isaac M. O'Bannon** • Nov. 16, 2015



From the **2015 Review of Tax Document Automation** Systems.

## Best Fit

Tax professionals who use either ProSeries or Lacerte who want to automate tax workflow processes by creating paperless PDF workpapers and importing tax data from scanned in client documents, as well as from financial institutions.

## Strengths

- A two-stage optical character recognition function increases data reliability

Tax Scan and Import is a module for firms using the ProSeries and Lacerte tax preparation systems, offering the ability to scan in client documents, with the system then using optical character recognition (OCR) to determine which forms were scanned, and then pulling the appropriate client data from each. Following an accuracy check, the system can then automatically input the data into a client's return.

The Tax Scan and Import module has a unique feature compared to the other systems in this review, in that it includes integration with dozens of financial institutions and payroll service providers. This speeds up the process of obtaining client source documents, and also helps improve data accuracy, since no scanning of paper documents is required.

**Core Product Functions/Features: 4.5 Stars**

Tax San and Import is a cloud-based service that users access via links in Lacerte and ProSeries. The system opens up via user-friendly screens that guide the user through the process of selecting a client, then scanning and importing the client's documents. The features are automatically available if a firm decides to try the system during tax season, with instant access and no program downloads or installation processes.

The Import function (from financial institutions) is available at no additional cost to firms with a Fast Path license, which is the bundle firms get, with efile fees, network access, and other services included. The Scan feature can be used on a per-return basis or via prepaid bundles. When working with the tax system (ProSeries or Lacerte), users can access previously scanned in documents and those that have been imported from financial institutions. The system includes built-in security with use bank-level encryption on all client data. No client logins or identifying data is stored in the program.

**Paperless Workflow: 4.25 Stars**

Tax Scan can read data from most common IRS forms, as well as from consolidated brokerage statements. The system includes a Transaction Data Reviewer feature to ensure and edit documents in Microsoft Excel format prior to importing it into a client's return in ProSeries or Lacerte. Users can view source documents and the data sheet on a side-by-side screen, along with proforma information from the prior year, if available. Within the client tax return, data that has been imported is highlighted in green to make it easy to verify.

### Integration: 4.5 Stars

Tax Import directly integrates with Lacerte and ProSeries, and the document management systems for each, it does not integrate with other tax systems. The financial institution integration and data import function streamlines data entry and accuracy. The program uses Excel spreadsheets for data review.

### Help/Support/Training: 4.5 Stars

User help functions are accessed through the tax system (ProSeries or Lacerte). Online support is available through the Intuit Resource Center, which offers how-tos, short videos, FAQs, user documentation and an online user community. Phone and web-based live support is included with the tax programs. Via Intuit's website, users have given the system a 4.6 out of 5 star rating.

## Summary & Pricing

ProSeries and Lacerte Scan and Import streamlines tax data entry two ways: By allowing users to scan in client documents, which are then processed into PDF tax workpapers with bookmarks and links; and via the financial institution import functions, which can pull W-2 and 1099 information instantly via secure integration.

The system can be used on a per-return basis or firms can purchase multiple usage for

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