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Intuit Lacerte and ProSeries Scan and Import

<https://proconnect.intuit.com/proseries/>

<https://proconnect.intuit.com/lacerte/>

From the August 2019 reviews of tax document automation systems.

Scan and Import is offered in both Intuit Lacerte and ProSeries products. Designed to work within the application itself, Scan and Import cannot be used as a stand-alone application, and does not integrate with other tax applications. Links to the product are included in both Lacerte and ProSeries, so users can begin to use the application at any time.

Core Product Functions/Features: 4.5 Stars

Scan and Import access is available from the Lacerte/ProSeries drop down menu by clicking on the Import feature. From the Tax Import feature, users can choose to import data from scanned PDFs as well as from online accounts. The import feature

is available at no cost to any firm using the Professional edition of either application

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available that enables users to review imported data prior to populating the 1040 form. Users can choose to use the per-form option or purchase an unlimited license.

Paperless Workflow: 4.25 Stars

Users can scan source documents into a PDF or use Lacerte or ProSeries Document Management Systems in order to create the PDF in the best format. Once the PDF is created, users can choose the file and click send to submit to Tax Scan and Import. Most PDF's submitted are completed in less than 20 minutes, though larger files may take longer. Once a file has been sent for processing, users can view the status of the file. When the file has been processed, a Ready to Import link will be visible next to the submitted file that notifies users that the file is complete and ready to import. Mentioned earlier, all imported data can be reviewed for accuracy, with users clicking on the Mark Form Data as Reviewed box to indicated the file has been checked.

When used with other Lacerte or ProSeries features such as the Document Management feature and the Client Manager feature, users can reduce the need to sift through stacks of papers. A variety of forms are supported in Scan and Import including brokerage statements, W-2s, 1099s, and Schedule K-1, with users able to download both W-2s and 1099s directly from financial institutions.

Integration: 4.25 Stars

Tax Scan and Import integrates with both Lacerte and ProSeries tax applications including the document management module, the client organizer, and the tax folders. The product also integrates with numerous financial institutions, Intuit Payroll, ADP Payroll, and also integrates with SmartVault and Document Management System, along with Intuit Link, which allows clients to easily share source documents in a secure manner.

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Summary & Pricing

Tax and Scan, available in both ProSeries and Lacerte Intuit is best suited for small to mid-sized accounting and CPA firms. The product offers scanning, importing, and binder creation, as well as easy importing of important year-end tax documents from a variety of financial institutions and applications. The form import feature is included at no additional charge for that currently have a Fast Path license and use the professional version of either Lacerte or ProSeries. The scan and import functions are priced separately, with users able to pay on a per-return basis at \$10.00 per created form, or purchase the unlimited license, which currently runs \$1,733.

2019 Overall Rating: 4.5 Stars

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