SurePrep®

SurePrep 1040SCANSurePrep

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From the August 2019 reviews of tax document automation systems.

SurePrep 1040SCAN is a good fit for those using other SurePrep applications. The product also works well with third-party accounting applications such as CCH Axcess Tax, CCH ProSystem *fx* Tax, GoSystem Tax RS, CCH Global *fx*, Lacerte, and UltraTax CS. All SurePrep applications are web-based for easy accessibility. x1040SCAN is available in four versions; 1040SCAN Organize, 1040SCAN Pro, 1040SCANverify, and 1040SCANverify+.

Core Product Functions/Features: 5 Stars

1040SCAN Organize offers document bookmarking and source document organization into a standardized workpaper index that follows the order of a client tax return. 1040SCAN Pro offers the same bookmarking and organization capability, but also includes data export to third party tax applications, populating the tax form with the exported data. The product also now offers auto-verification for native PDFs, using OCR technology to compares the traditional OCR with the native PDF text layer, verifying matching documents with 100 percent accuracy, without the need for human verification. 1040SCANverify offers a combination of software and service, which verifies source document data prior to exporting the data to tax

software. Finally, 1040SCANverify+ which can manually bookmark and organize

being exported. Users can submit a job at any time, and add additional documents at a later date. SurePrep offers quick processing time of scanned documents, with an estimated turnaround time of 30 minutes for a 50-page document.

Paperless Workflow: 5 Stars

When used with other SurePrep applications such as SPbinder and Tax Caddy, users can retrieve client source documents from Tax Caddy, then simply scan them using 1040SCAN. All standard documents are verified prior to exporting, and any PDF document scanned is automatically verified.

Integration: 4.75 Stars

1040SCAN offers solid integration capability with other SurePrep applications such as Tax Caddy and SPbinder. Tax Caddy works to gather all of the necessary source documents from clients, while SPbinder is considered the workpaper system and can manage a variety of workpaper types including PDFs, Microsoft Excel spreadsheets, Word document, and client email correspondence. SPbinder also offers a variety of other features including sign-off tracking, which allows users to review the entire set of workpapers. Both tickmarks and annotations are supported in all file types, and users can open items and review notes as desired. SPbinder is included with all versions of 1040SCAN, but can also be purchased as a standalone application. All 1040SCAN versions also integrate with a variety of third-party tax preparation software including CCH Axcess Tax, CCH ProSystem fx Tax, GoSystems RS Tax, CCH Global fx, Lacerte, and UltraTax CS. The application will also export data to just about tax software product. SurePrep also offers tax return preparation outsourcing through their Outsource application, with on staff tax preparers using the same applications listed above to prepare tax returns.

Help/Support/Training: 4.75 Stars

SurePrep offers unlimited client support via email, phone, and chat, with all support

1040SCAN from SurePrep is available in four versions; 1040SCAN Organize, 1040SCAN Pro, 1040SCANverify, and 1040SCANverify+. In addition, all 1040SCAN applications include SPbinder, though SPbinder can be purchased as a stand-alone application as well.

SurePrep offers excellent integration options with popular third-party tax preparation applications as well as solid exporting capability to just about any tax software product on the market.

1040SCAN Pricing is typically based on the number of returns processed, though users should contact SurePrep directly to obtain pricing for 1040SCAN, Tax Caddy, or SPbinder (if purchasing separately). Pricing for Outsource, with both off-shore and on-shore options available, is based on the complexity of the tax return, with pricing obtained directly from SurePrep.

2019 Overall Rating: 5 Stars

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