



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

What do you need to know for the Upcoming Busy Season

- Peter Miele, VP of Sales
- Sarika Arora, Director of Product



Peter Miele

Peter Miele is the Vice President of Sales for SurePrep, LLC and is responsible for leading sales and business development activities across the company. Peter combines comprehensive tax & accounting, paperless workflow and sales knowledge, along with the ability to communicate effectively across all levels of customer management.

Before joining SurePrep in April 2006, Peter was a Tax Manager with the accounting firm Deloitte, where he gained nearly a decade of tax and accounting experience. Peter earned a bachelor's degree in accounting from Seton Hall University in 1998.





Sarika Arora

Sarika Arora is the Director of Product for SurePrep, LLC.

As the head of the Product Department, Sarika is responsible for articulating the product vision and orchestrating the product team to achieve this common goal. Sarika focuses on defining product strategy to meet our client needs, improve their experience and maximize their satisfaction.

Sarika started her career with SurePrep (India) in 2004 preparing U.S. tax returns. She joined SurePrep, LLC in 2009 as a Client Success Manager. Sarika earned her Master's in Accounting and Taxation from the University of Mumbai in 2005.



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

Custom Branding

The screenshot displays the 'Custom Styling' interface for a firm named 'B L'. The interface is divided into a left sidebar with 'Firm Details', 'Custom Styling', and 'Tax Year Manager'. The main area is titled 'Custom Styling' and includes a sub-header 'Brand TaxCaddy with your Firm's own colors'. Below this, there are navigation tabs for 'Overview', 'Documents', and 'Messages'. A preview section shows a 'Secondary Header' with a '+ Button Text' button, a 'Header' with placeholder text, and two 'Toggle Text' buttons. A 'Preview' icon is visible below the preview section. The bottom section contains color selection controls for 'Primary Color' (#4aaaa8), 'Secondary Color' (#125668), 'Header Color' (#125668), and 'Body Font Color' (#313A40). Each color selection includes a color swatch and a text input field. A 'Show Default' button is located at the bottom left, and a 'Save Changes' button is at the bottom right.

Firm Details Custom Styling Brand TaxCaddy with your Firm's own colors

Custom Styling B L Overview Documents Messages

Tax Year Manager

Secondary Header + Button Text

Header
Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Click Me

Toggle Text Toggle Text

Preview

Desktop

Primary Color #4aaaa8
Please use your firm's lighter color here.

Secondary Color #125668
Please use your firm's darker color here.

Header Color #125668
Color for Titles/Headers

Body Font Color #313A40

Show Default Save Changes





Tax Returns Tax Payments

01/01/2019

IRS Messages \$300.00

01/02/2019

City o... LA \$200.00

04/04/2019

State ... Estim... 100.00

Did you know? You can associate messages with your questionnaire by using the message panel on the Questionnaire page. LEARN MORE

Upload Documents: Drag and drop or click to upload documents

Requests from BL & Associates You have 15 pending requests

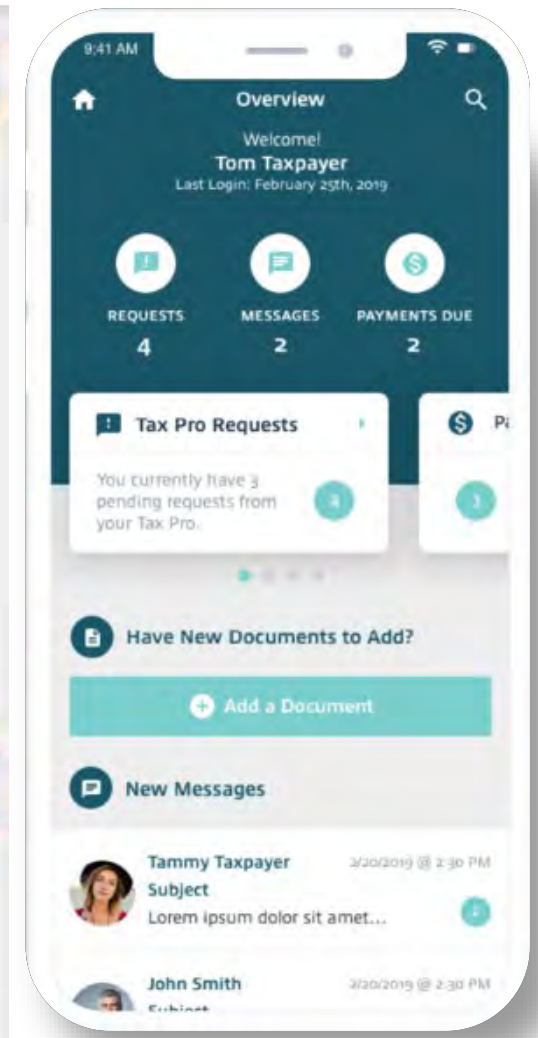
- In Progress - 2018 Que... 28 out of 32 pending 28 of 32 remaining
View - 2018 Tax Return
Review - 2018 Documents (3)
Upload - 2018 W-2 (Wages) - EFG Company 1 out of 3 pending
View new 2018 Messages (2)

Smart Links Add Smart Link

Allow TaxCaddy to safely retrieve your tax documents for you. My Linked Accounts ADD NEW HAVING TROUBLE?

Recent Uploads

- 2018 1099 UBS (0002) 1099s (Banks and Brokerages) - Uploaded on...
W-2 ABC, Inc. (0002) W2 (Income) - Uploaded on 10/06/2019 at 07:1...
1099-MISC (123) 1099-MISC - Uploaded on 10/06/2019 at 07:10 ...
1099-INT 1099-INT - Uploaded on 10/06/2019 at 07:10 AM
View More





Tax Returns

Tax Payments

Tax Year 2018 2019



You don't have a return yet.
Sit tight for now and let your tax professional work their magic.



Announcement

TaxCaddy 2.0 is here! You can now see all your tasks under Tax Pro Requests, manage other users with their permission, and more. Learn more.

LEARN MORE >

Upload Documents:

Drag and drop or click to upload documents

Requests from BL & Co.,133

You have 0 pending requests

There are currently no requests from your tax professional
You may begin uploading documents to tax years using the Upload Documents section above

Smart Links

Add Smart Link

Allow TaxCaddy to safely retrieve your tax documents for you.
Here are some examples of accounts that can be linked today!



US Bank

VIEW MORE



We use industry-standard data encryption to ensure the safety of your personal information.

LEARN MORE >

Recent Uploads

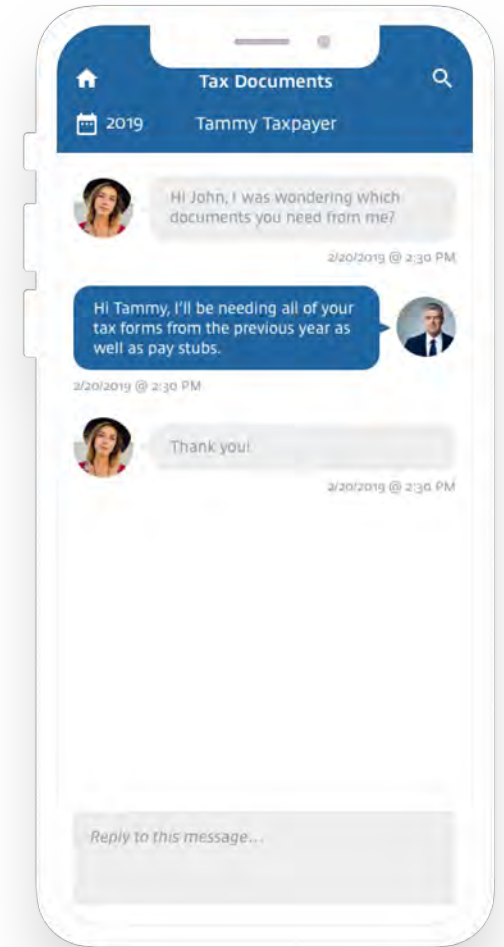
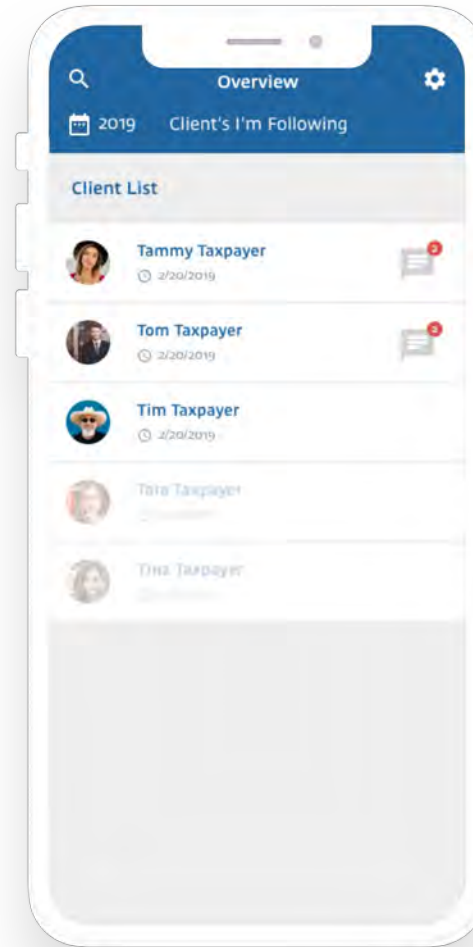
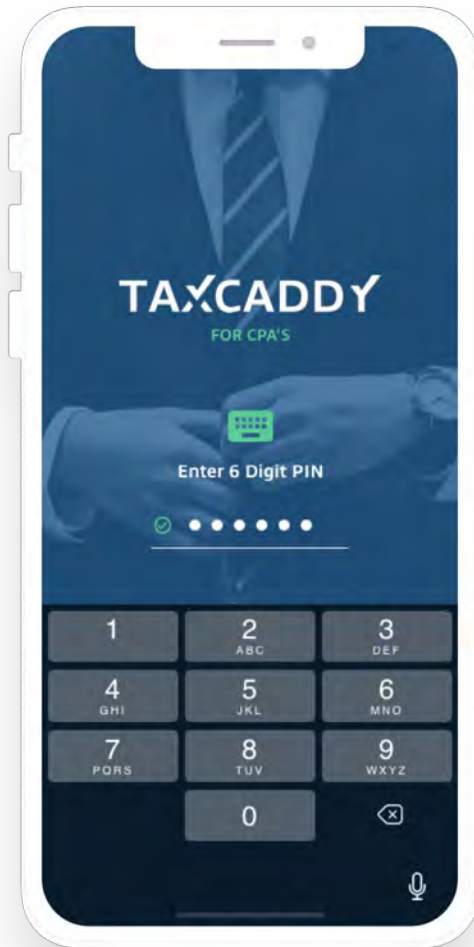
DHG_Presentation
W-2 (Wages) - Uploaded on 06/27/2019 at 10:0...

View More



Tax Professional Mobile App

View and respond to taxpayer messages in TaxCaddy from your mobile device.



TAX TRANSFORMATION
SUMMIT
NOVEMBER 3-5, 2019

[Profile Info](#)[Notifications](#)[Mobile Settings](#)

Mobile Messaging App ?

Set up a mobile device:

Click the button below to begin setting up a mobile device. You will be provided with a QR code, and will then scan the code using your mobile device.

[Initiate Setup](#)

Connected devices:

Device Name	Connection Date	Last Activity	
John's iPhone X	12/12/19	01/13/19	Disconnect
John's iPad	02/13/19	03/25/19	Disconnect
John's Android	11/14/19	02/05/19	Disconnect

Firm Details

Mobile Messaging App

Mobile Device Setup

Use your mobile device to scan the QR code that appears below:



Code will refresh every 30 seconds

Cancel

Jack's iPhone 8S

08/26/19

08/26/19

Amanda's Samsung

08/19/19

08/19/19

Frank's iPhone 8

08/22/19

08/22/19

Reviewer Dashboard

The Reviewer Dashboard will serve as a high level risk analysis and review tool to sign off and file tax returns more efficiently

The screenshot displays the SurePrep Reviewer Dashboard for 2019 Tax Returns. The main interface is titled "2019 Tax Returns" and includes a search bar for clients. A list of clients is shown, each with a completion percentage and a status indicator. A red arrow points from the "Tom Taxpayer" entry in the list to a detailed checklist for that taxpayer.

Client Name	Binder ID	Client ID	Completion	Status
Tom Taxpayer	8100238	7216B	0% Complete	REVIEW
Jane Seymour	8100238	7216B	0% Complete	WAITING ON DOCUMENTS
Tom Brady	8100238	7216B	70% Complete	IN ERROR
Billy Bob Thornton	8100238	7216B	70% Complete	DELIVERY IN PROCESS
John Wayne	8100238	7216B	0% Complete	REVIEW
George Harrison	8100238	7216B	60% Complete	

The detailed checklist for Tom Taxpayer shows the following items:

- DOCUMENTS: Missing Documents (7)
- TWO YEAR COMPARISON: Change Tracking (3)
- UNRECONCILED VARIANCES: Notable Variances (2)
- SIGN OFF HISTORY: Unreviewed Workpapers (8)
- T/R STAMPS: Unreviewed T/R Stamps (8)
- NOTES: Uncleared Notes (10)
- DELIVERABLES: Prepare Deliverables
- INVOICES: Suggested Invoice: \$5,000

Buttons at the bottom of the checklist include "SP BINDER", "TAXPAYER PROFILE", and "DELIVER".





CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return



Tom Taxpayer's Checklist

0% Complete

DOCUMENTS
Missing Documents 1

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE


DELIVER

 Dashboard





CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return

 Tom Taxpayer's Checklist

0% Complete

-  DOCUMENTS
Missing Documents 2
-  TWO YEAR COMPARISON
Review Changes
-  DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return



Tom Taxpayer's Checklist

0% Complete

DOCUMENTS 2
Missing Documents

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

DOCUMENTS

2 MISSING 2 RECEIVED 2 NEW 2 N/A

Received Documents

Merril Lynch Investment Gr... W-2 (Wages)	\$100,000
Bank of America W-2 (Wages)	\$75,000

MERRIL LYNCH INVESTMENT GROUP

Summary

w-2 Wages

PRIOR YEAR AMOUNT: \$100,000
UPLOADED BY: Administrator, Firm (June 18, 2019 11:25AM)

Notes

1	SUBJECT: Two Year Comparison	TYPE: General	PRIOR YEAR AMOUNT: \$5,000
---	------------------------------	---------------	----------------------------

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

John Smith
Oct 23, 2019 - 4:36 pm
CLEARED: SARA JONES 10/25/19 1:30 PM

2	SUBJECT: Two Year Comparison	TYPE: General	PRIOR YEAR AMOUNT: \$5,000
---	------------------------------	---------------	----------------------------

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

John Smith
Oct 23, 2019 - 4:36 pm

2	SUBJECT: Two Year Comparison	TYPE: General	PRIOR YEAR AMOUNT: \$5,000
---	------------------------------	---------------	----------------------------

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

James Jones
Oct 23, 2019 - 4:36 pm

3	SUBJECT: Two Year Comparison	TYPE: General	PRIOR YEAR AMOUNT: \$5,000
---	------------------------------	---------------	----------------------------

VIEW DOCUMENT

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return



Tom Taxpayer's Checklist

0% Complete

DOCUMENTS 2
Missing Documents

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

DOCUMENTS

2 MISSING 2 RECEIVED 2 NEW 2 N/A

Received Documents

Merril Lynch Investment Gr... \$100,000
W-2 (Wages)

Bank of America \$75,000
W-2 (Wages)

MERRIL LYNCH INVESTMENT GROUP

Summary

w-2 Wages

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Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

John Smith
Oct 23, 2019 - 4:36 pm CLEARED: SARA JONES 10/25/19 1:30 PM

2 SUBJECT: Two Year Comparison TYPE: General PRIOR YEAR AMOUNT: \$5,000

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

John Smith
Oct 23, 2019 - 4:36 pm

2 SUBJECT: Two Year Comparison TYPE: General PRIOR YEAR AMOUNT: \$5,000

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

James Jones
Oct 23, 2019 - 4:36 pm

3 SUBJECT: Two Year Comparison TYPE: General PRIOR YEAR AMOUNT: \$5,000

VIEW DOCUMENT

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return



Tom Taxpayer's Checklist

0% Complete

DOCUMENTS Missing Documents 2

TWO YEAR COMPARISON Review Changes

DELIVERABLES Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

DOCUMENTS

2 MISSING 2 RECEIVED 2 NEW 2 N/A

New Documents

Charles Schwab & Co. \$100,000
W-2 (Wages)

Wells Fargo \$75,000
W-2 (Wages)

CHARLES SCHWAB & CO.

Summary

w-2 Wages

PRIOR YEAR AMOUNT: \$100,000

UPLOADED BY: Administrator, Firm (June 18, 2019 11:25AM)

Notes

1 SUBJECT: Two Year Comparison TYPE: General PRIOR YEAR AMOUNT: \$5,000

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

John Smith Oct 23, 2019 - 4:36 pm CLEARED: SARA JONES 10/25/19 1:30 PM

2 SUBJECT: Two Year Comparison TYPE: General PRIOR YEAR AMOUNT: \$5,000

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

John Smith Oct 23, 2019 - 4:36 pm

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Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

James Jones Oct 23, 2019 - 4:36 pm

3 SUBJECT: Two Year Comparison TYPE: General PRIOR YEAR AMOUNT: \$5,000

VIEW DOCUMENT

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return



Tom Taxpayer's Checklist

0% Complete



DOCUMENTS
Missing Documents



TWO YEAR COMPARISON
Review Changes



DELIVERABLES
Prepare Deliverables

SPBINDER

TAXPAYER PROFILE

DELIVER

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return

Tom Taxpayer's Checklist

0% Complete

DOCUMENTS
Missing Documents

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

TWO YEAR COMPARISON

CATEGORY	2018	2019	% CHANGE
INCOME			
Taxable Interest	\$10,000	\$15,000	50%
Wages	\$115,000	\$130,000	10%
Qualified Dividends	\$5,000	\$6,000	20%
Ordinary Dividends	\$1,000	\$2,000	10%
Social Security Benefits	\$40,000	\$44,000	10%
Schedule D	\$10,000	\$11,000	10%
Schedule E	\$500	\$700	20%
Gifts	\$200	\$240	20%
Contributions	\$10,000	\$12,000	20%
ADJUSTMENTS AND AGI			
Moving Expenses	\$10,000	\$12,000	-20%
Penalty on Withdrawl...	\$10,000	\$12,000	20%
Alimony Paid	\$10,000	\$12,000	20%
ITEMIZED DEDUCTIONS AND EXEMPTIONS			
TAX			
CREDITS AND TAX AFTER NON-REFUNDABLE CREDITS			
OTHER TAXES			

REVIEW ALL

TAXABLE INTEREST

DESCRIPTION	PREVIOUS YEAR	CURRENT YEAR	% CHANGE
Stocks DOW JONES	\$1,000	\$1,800	80%
Mutual Funds ACORNS	\$3,000	\$5,040	68%
Stocks & Bonds TS AMERITRADE	\$2,000	\$1,960	2%
Index Funds S&P 500	\$4,000	\$6,200	55%



CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return



Tom Taxpayer's Checklist

0% Complete

- DOCUMENTS
Missing Documents 0
- TWO YEAR COMPARISON
Review Changes
- DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return

Tom Taxpayer's Checklist

0% Complete

DOCUMENTS
Missing Documents

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

DELIVERABLES



Please fetch deliverables by clicking the button below:

- Tax Returns Filed
- Tax Payment(s)
- E-File Authorization(s)

FETCH DELIVERABLES



CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return



Tom Taxpayer's Checklist

0% Complete

- DOCUMENTS
Missing Documents
- TWO YEAR COMPARISON
Review Changes
- DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

DELIVERABLES



Please fetch deliverables by clicking the button below:

- Tax Returns Filed
- Tax Payment(s)
- E-File Authorization(s)

FETCH DELIVERABLES

APPROVE ALL

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return



Tom Taxpayer's Checklist

0% Complete

DOCUMENTS
Missing Documents

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

DELIVERABLES



Please fetch deliverables by clicking the button below:

Tax Returns Filed

FETCH IN PROGRESS...

Tax Payment(s)

FETCH IN PROGRESS...

E-File Authorization(s)

FETCH IN PROGRESS...

FETCH IN PROGRESS



CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return



Tom Taxpayer's Checklist

0% Complete

DOCUMENTS
Missing Documents

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

DELIVERABLES



Select items to view and approve:

Tax Returns Filed

Federal

Current Year State(s)

California

Arizona

Tax Payment(s)

E-File Authorization(s)

FETCH DELIVERABLES

APPROVE ALL

CLIENT LIST

Tom Taxpayer - 2019 Tax Return

Tom Taxpayer's Checklist

0% Complete

DOCUMENTS
Missing Documents

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

DELIVERABLES

Select items to view and approve:

Tax Returns Filed

Federal

Current Year State(s)
California
Arizona

Tax Payment(s)

E-File Authorization(s)

FETCH DELIVERABLES

APPROVE ALL

FEDERAL TAX RETURN

2018 Federal Tax Return

REMOVE VIEW RETURN

Married filing separate return
 Qualifying widow(er)
 Head of household

Your first name and initial		Last name		Your social security number : : : :	
Standard deduction: <input type="checkbox"/> Someone can claim you as a dependent <input type="checkbox"/> You were born before January 2, 1954 <input type="checkbox"/> You are blind					
Spouse or qualifying person's first name and initial (see inst.)		Last name		Spouse's social security number : : : :	
Standard deduction: <input type="checkbox"/> Someone can claim your spouse as a dependent <input type="checkbox"/> Your spouse was born before January 2, 1954 <input type="checkbox"/> Your spouse is blind <input type="checkbox"/> Your spouse itemizes on a separate return or you were dual-status alien					
Home address (number and street). If you have a P.O. box, see instructions.				Apt. no.	Presidential Election Campaign. <input checked="" type="checkbox"/> if you want \$3 to go to this fund (see inst.) <input type="checkbox"/> You <input type="checkbox"/> Spouse <input type="checkbox"/> Full-year health care coverage (see instructions)
City, town or post office, state, and ZIP code. If you have a foreign address, attach Schedule 6.					
Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> if qualifies for (see inst.):	
(1) First name	Last name			Child tax credit	Credit for other dependents
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
Sign Here Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and accurately reflect all amounts and sources of income I received during the tax year. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.					
Joint return? See instructions. Keep a copy for your records.	Your signature		Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.) <input type="text"/>
	Spouse's signature. If a joint return, both must sign.		Date	Spouse's occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.) <input type="text"/>
Paid Preparers		Print/Type preparer's name	Preparer's signature		PTIN
Firm's name ▶				Firm's EIN ▶	
					Check if: <input type="checkbox"/> 3rd Party Designee <input type="checkbox"/> Self-employed

CLIENT LIST

Tom Taxpayer - 2019 Tax Return

Tom Taxpayer's Checklist

0% Complete

DOCUMENTS
Missing Documents

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

DELIVERABLES

Select items to view and approve:

Tax Returns Filed

Federal

Current Year State(s)
California
Arizona

Tax Payment(s)

E-File Authorization(s)

VIEW DELIVERABLES

APPROVE ALL

STATE TAX RETURN



2018 California Tax Return

REMOVE

VIEW RETURN

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return

Tom Taxpayer's Checklist

0% Complete

- DOCUMENTS
Missing Documents
- TWO YEAR COMPARISON
Review Changes
- DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

DELIVERABLES

Select items to view and approve:

- Tax Returns Filed
- Tax Payment(s)**
- 2018 Form 1040-V
- 2019 Form 1040-ES Voucher 1
- E-File Authorization(s)

VIEW DELIVERABLES

APPROVE ALL

TAX PAYMENT



2018 Form 1040-V

REMOVE

VIEW VOUCHER

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return



Tom Taxpayer's Checklist

0% Complete

DOCUMENTS
Missing Documents

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

DELIVERABLES

Select items to view and approve:

Tax Returns Filed

Tax Payment(s)

E-File Authorization(s)

2018 Federal E-File Authorization

2018 California State E-File Authorization

2018 Arizona State E-File Authorization

VIEW DELIVERABLES

APPROVE ALL

E-FILE AUTHORIZATION



2018 Federal E-File Authorization

REMOVE

VIEW VOUCHER



CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return



Tom Taxpayer's Checklist

0% Complete

DOCUMENTS
Missing Documents

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER

TAXPAYER PROFILE

DELIVER

DELIVERABLES



Select items to view and approve:

Tax Returns Filed

Tax Payment(s)

E-File Authorization(s)

2018 Federal E-File Authorization

2018 California State E-File Authorization

2018 Arizona State E-File Authorization

FETCH DELIVERABLES

APPROVE ALL

E-FILE AUTHORIZATION



2018 Federal E-File Authorization

REMOVE

VIEW VOUCHER

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return



Tom Taxpayer's Checklist

0% Complete

- DOCUMENTS
Missing Documents
- TWO YEAR COMPARISON
Review Changes
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Prepare Deliverables

SPBINDER TAXPAYER PROFILE

DELIVER

DELIVERABLES



Select items to view and approve:

- Tax Returns Filed
- Tax Payment(s)
- E-File Authorization(s)
- 2018 Federal E-File Authorization
- 2018 California State E-File Authorization
- 2018 Arizona State E-File Authorization

FETCH DELIVERABLES

APPROVE ALL

E-FILE AUTHORIZATION



2018 Federal E-File Authorization

REMOVE

VIEW VOUCHER



Tax Year 2017 2018 2019

Phase: Review and File

View Tax Returns

Filing Instructions

Document Name	Requested On
2019 Filing Instructions	10/30/2019 - 12:24 PM

Federal Tax Return

Document Name	Requested On
2019 Federal Tax Return	10/30/2019 - 12:24 PM

State Tax Return

Document Name	Requested On
2019 Arizona Tax Return	10/30/2019 - 12:24 PM
2019 California Tax Return	10/30/2019 - 12:24 PM

Tax Summary

Federal

AGI	Taxable Income
\$ 235,000	\$ 198,000
Effective Tax Rate	Total Tax
23.4 %	\$ 46,332

Amount Owed
\$ 6,200

California

AGI	Taxable Income
\$ 235,000	\$ 198,000
Effective Tax Rate	Total Tax
23.4 %	\$ 46,332

Amount Refunded
\$ 15,300

Arizona

Custom DRL to Include Fillable Organizers

- Enable categories to include fillable PDF templates

The screenshot shows the 'Document Request List' configuration page. The page has a navigation bar with 'Overview' and 'Administrative' tabs. Below the navigation bar are tabs for 'Client Management', 'Templates', 'Document Request List', 'Tax Returns', 'Firm Details', and 'External Connections'. The 'Document Request List' tab is active, showing a dropdown for 'TY2018' and a title 'Document Request List' with a sub-note 'Updated on 10/21/2019 at 02:53 AM by Gaurang Karnik'. There is an 'Add Category' button in the top right.

Below the navigation is a text block: 'Below are the categories that are available when uploading or moving a document. These categories may also appear on taxpayer DRLs. You may add or delete custom categories, but you cannot modify any that we have predefined for you.'

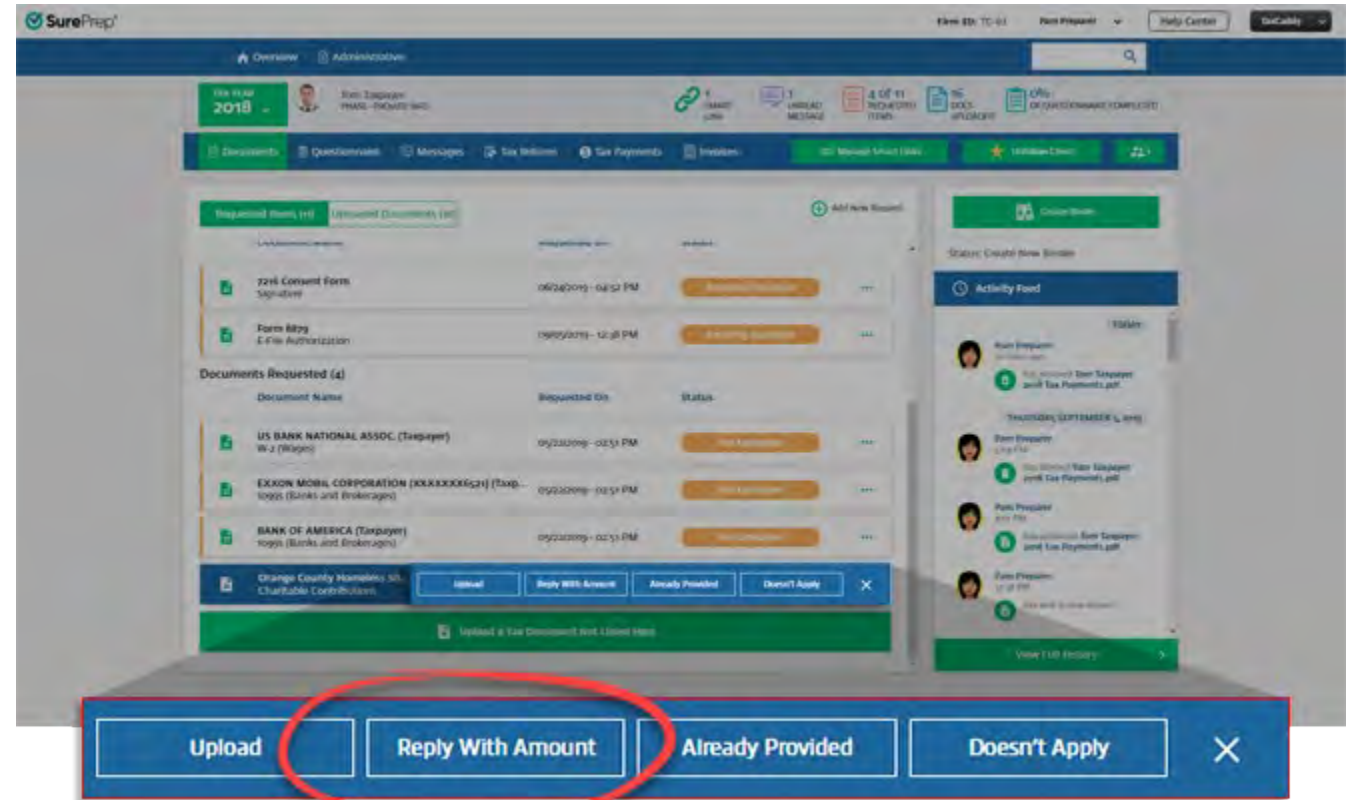
The main content area is divided into three columns:

- PREDEFINED CATEGORIES:** A list of tax forms with 'Yes' and 'No' toggle buttons. The 'Yes' buttons are highlighted in green.
- DISPLAY IN THE SHOW POPULAR TAB IN THE UPLOAD DOCUMENT OR MOVE DOCUMENT MODALS, EVEN IF PROFORMA DATA DOES NOT EXIST:** A column of 'Yes' and 'No' toggle buttons. The 'Yes' buttons are highlighted in green.
- INCLUDE FILLABLE PDF TEMPLATES TO CORRESPONDING ITEMS ON NEWLY CREATED DRLS:** A column of 'Yes' and 'No' toggle buttons. The 'Yes' buttons are highlighted in green. This column is enclosed in an orange border.

Category	Yes	No
W-2 (Wages)	Yes	No
1099s (Banks and Brokerages)	Yes	No
Sch. C (Business Income)	Yes	No
1099-R (Retirement)	Yes	No
Sch. E (Rents and Royalties)	Yes	No
Schedule K-1s	Yes	No
Sch. F (Farm Income)	Yes	No
1099-SSA (Social Security Benefits)	Yes	No
1099-G (Tax Refund)	Yes	No
1099-MISC (Misc. Income)	Yes	No
1099-Q (Qualified Education Payments)	Yes	No
Child Income	Yes	No

Custom DRL to Include Fillable Organizers

- Taxpayers access their fillable organizers from their DRL Request Items



Custom DRL to Include Fillable Organizers

- Taxpayers fill out fillable organizers online
- When available, PY data will populate onto taxpayer fillable organizers

Sch. C (Business Income)
Uploaded on 12/07/2018 at 02:10 PM by priya kamarapu
Letters
Fillable Form

File Home Comment
Hand Select Zoom Typewriter Highlight

Business Income, Cost of Goods Sold and Expenses

Business Name
Principal Business or Profession
Ownership Code
Employer ID Number
Street Address
City, State, ZIP Code
Accounting method: Cash, Accrual
Indicate X if business is fully dispose of in current year
Method of inventory: Cost, Lower cost/market, Other

	2018 Amount	2017 Amount
Health Insurance premiums paid for yourself and your dependent		

Income

	2018 Amount	2017 Amount
Gross Receipts or Sales		
Less Returns and allowances		

Other Income

	2018 Amount	2017 Amount

Download New Template Submit



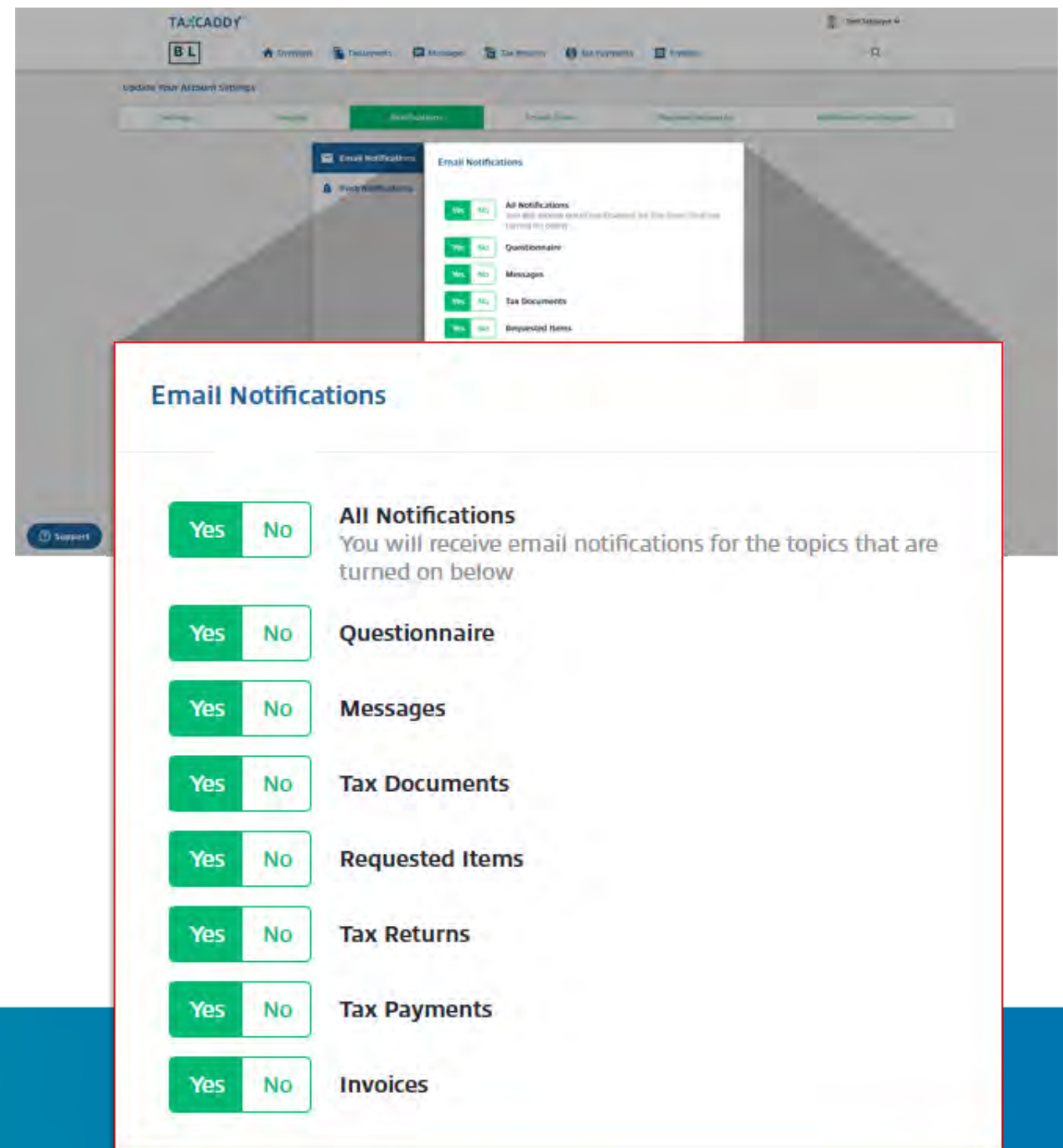
Reset DRL

- Tax professionals will be able to reset any created DRL before sending it to their clients

The screenshot shows the B.L. software interface. At the top right, it displays 'Firm ID: SPT-32' and 'Andre'. The main navigation bar includes 'Overview' and 'Administrative' (highlighted in green). Below this, there are tabs for 'Client Management', 'Templates', 'Document Request List', 'Tax Returns', 'Firm Details', and 'External Connections'. The 'Document Request List' tab is active, showing a 'Tax Year' dropdown set to 'TY2018' and a filter 'I want to manage' set to 'Invite'. It also shows 'Viewing 50 of 424' items. A 'Send Invite to All' button is visible on the right. Below the filters, there is a 'Select All on Page' checkbox and a pagination control showing '1' of 1 pages. The main content area is a table with columns: STATUS, DATE, OFFICE LOCATION, LOCATION RESTRICTION, CLIENT FIRST NAME *, CLIENT LAST NAME *, and CLIENT EMAIL *. The first row of the table has a 'Cancel' button, an 'Edit' button, a 'Delete' button, a 'Disconnect' button, an 'Edit DRL' button, and a 'Reset DRL' button (highlighted with a red border). The subsequent rows show 'Connected' status for three clients.

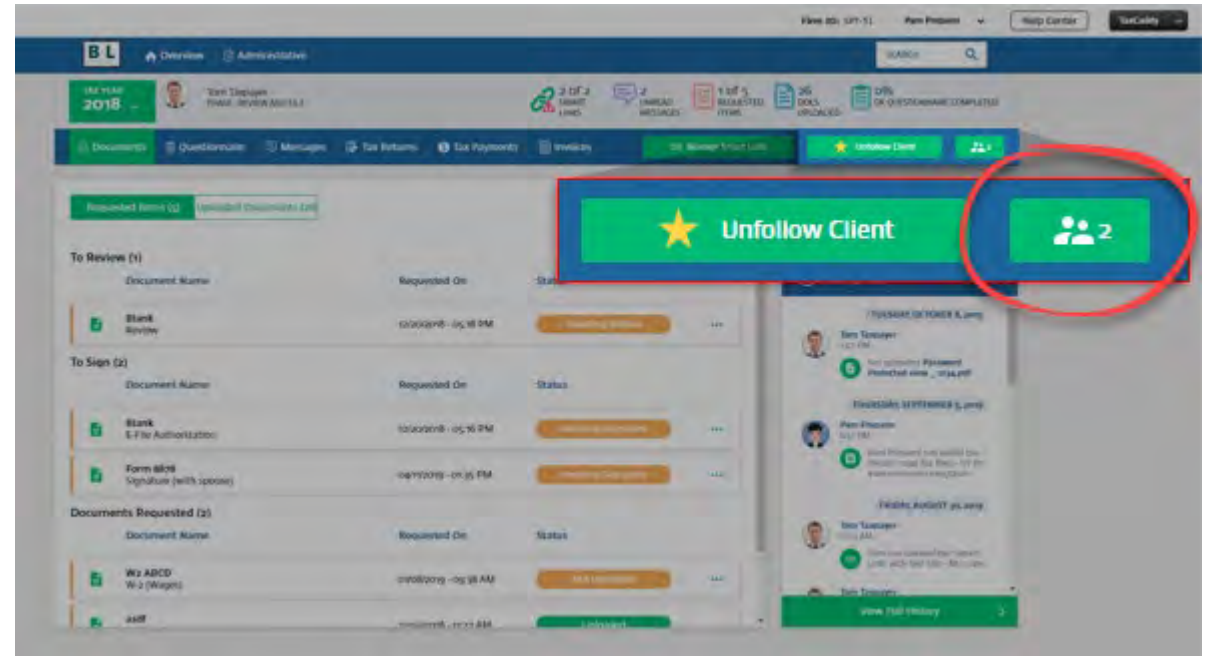
Spouse Notifications

- TaxCaddy spouse users will be able to receive and control the same email notifications the primary account holder has, giving them the ability to more fully take on managing the account



Owner, Followers and Members Stay in Sync

- Owners, followers and assigned members now sync across all tax years. Tax professionals will no longer need to rollover followers and assigned members!



Owner, Followers and Members Stay in Sync

The screenshot shows the BL software interface. A red circle highlights the 'Unfollow Client' button, which features a star icon and a user icon with the number '2'. A red arrow points from this button to the 'Member Engagement Team' dialog box.

The 'Member Engagement Team' dialog box displays the following information:

- Member Engagement Team** (with a close button 'X')
- Profile picture of Pam Preparer
- Pam Preparer**
- Profile picture of Paul Preparer
- PP Paul Preparer**
- +Add Member**
- Done** button

Three screenshots of the BL software interface showing the 'TAX YEAR' dropdown menu for 2017, 2018, and 2019. Red arrows from the 'Member Engagement Team' dialog box point to these screenshots, indicating that the team members are synchronized across different tax years.



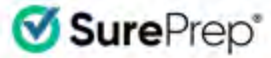
TAX TRANSFORMATION
SUMMIT
NOVEMBER 3-5, 2019

Assigned Members restrictions

- Binder access restrictions have been enhanced to allow firms to select at the domain level whether they would like to allow adding team members at binder level.



Bulk Document Processing



Last Login

USERS

ACCOUNT SETUP

REVIEW WIZARD

TAX RETURN

SPBINDER

BILLING

REPORTS

ENTERPRISE FEATURES

Bulk Document Processing

Automated Workpaper Template

Binder Access Restrictions

7216 Consent

Manage Client Table

Upload documents in bulk and view the successfully uploaded records in the master table.

Please contact your SurePrep Client Success Manager (CSM) or SurePrep Support before using this functionality.

Collapse All

File Upload

[Standard Template Format](#)

Tax Year

List of uploaded files

FILE NAME	FILE SIZE	TAX YEAR
-----------	-----------	----------

Note: Only successfully uploaded files will be updated to the master table.

View Master Table

View No Match Table

Bulk Document Processing

Automated Work

Upload documents in bulk and view the successful
Please contact your SurePrep Client Success Manager

Collapse All

File Upload

Standard Template Format

Tax Year 2018

Browse

List of uploaded files

FILE NAME

Note: Only successfully uploaded files will be up

View Master Table


View No Match Table

Open

Documents

Organize New folder

- Quick access
- Documents
- Downloads
- Pictures
- Sample PDFs
- SurePrep
- TaxCaddy
- Desktop
- gif
- New folder
- ss - v2
- Creative Cloud Fil
- OneDrive



Bulk Documents.pdf

File name: Bulk Documents.pdf

All Files (*.*)

Open Cancel

Improvements to Native PDF Processing

1045SCAN - Verification (EngagementID : 28026, Domain : DCRDetails-01, ClientNumber : TR1-autovrfy-02, Taxsoftware : ProSystem fx, Taxyear : 2017)

Show Page(s) Auto Verified Page: 1 of 47 100% Submit

Auto Verified

Employee's social security number: 200-30-4001

Safe, accurate, FAST! Use **e-file** Visit the IRS website at www.irs.gov/efile

b Employee identification number (EIN): 01-0704050	1 Wages, tips, other compensation: 37506.25	2 Federal income tax withheld: 2216.58
c Employer's name, address, and ZIP code: WHYNOT STOP INC, 532 MAIN STREET, WATERVILLE, ME 25570	3 Social Security wages: 38828.14	4 Social Security tax withheld: 2407.34
	5 Medicare wages and tips: 38828.14	6 Medicare tax withheld: 563.01
	7 Social Security tips: 0.00	8 Allocated tips: 0.00
	9 Verification code: 00	10 Dependent care benefits: 0.00
	11 Nonqualified plans: 0.00	12a See instructions for box 12: 0.00
	13 Statutory employee: <input type="checkbox"/>	12b DD: 23806.24
	Retirement Plan: <input checked="" type="checkbox"/>	13c
	Third party sick pay: <input type="checkbox"/>	
	14 Other: <input type="checkbox"/>	

Corrected W-2 (Form W-2C) Employee's social security number: 200-30-4001 OMB No. 1545-0008

b Employer identification number (EIN): 01-0704050	1 Wages, tips, other compensation: 37,606	2 Federal income tax withheld: 2,217
c Employer's name, address, and ZIP code: WHYNOT STOP INC, 532 MAIN STREET, WATERVILLE, ME 25570	3 Social Security wages: 38,828	4 Social Security tax withheld: 2,407
	5 Medicare wages and tips: 38,828	6 Medicare tax withheld: 563

Mandatory Fields

WHYNOT STOP INC
532 MAIN STREET
WATERVILLE, ME 25570

13 Statutory employee: Retirement Plan: Third party sick pay: 12b DD: 23,806



Two Factor Authentication

- Tax professionals will be able to securely login to FileRoom using Two Factor Authentication

SurePrep | FileRoom

Log In

SPT-51

firmadmin

.....

[Forgot Password?](#) **Log In**

Copyright © 2017 SurePrep, LLC. All rights reserved.

[Click here for support hours](#)

[Click here for SurePrep system status](#)





Additional Security

Two Factor Authentication [?](#)

Please enter the code sent to your email at su*****@gmail.com. This code will expire in 5 minutes.

Attempt 1 of 4



098765

Didn't receive the code? [Resend Code](#)

VERIFY

Don't ask again on this device

[If you no longer have access to this email, please contact your firm's system administrator.](#)

+ CREATE NEW BINDER ▾

▣ COLUMN SETUP

⬇️ DOWNLOAD FILES

🚫 CLEAR FILTER

2018 ▾

Show All Binders ▾

⚠️ 3

📄 EXPORT TO EXCEL

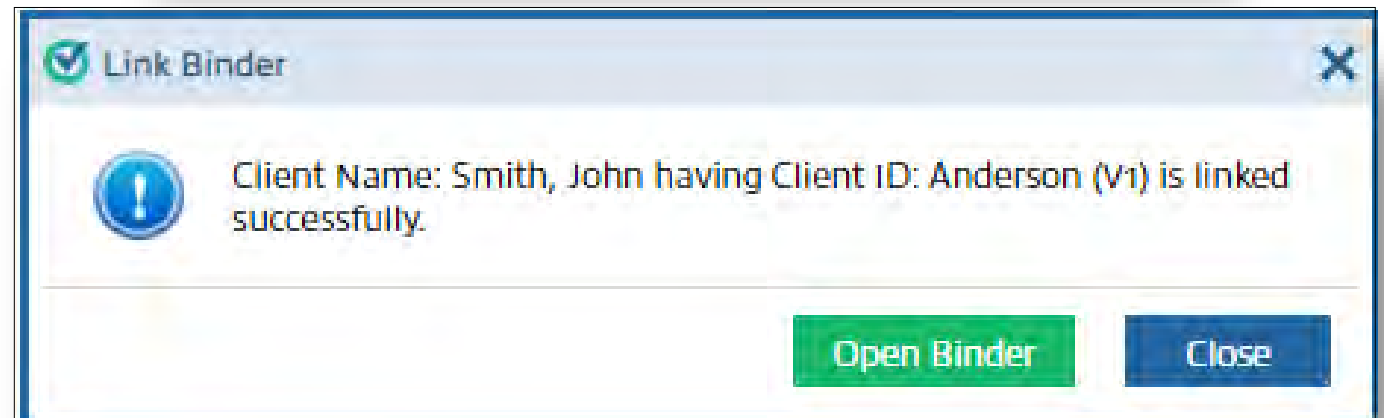
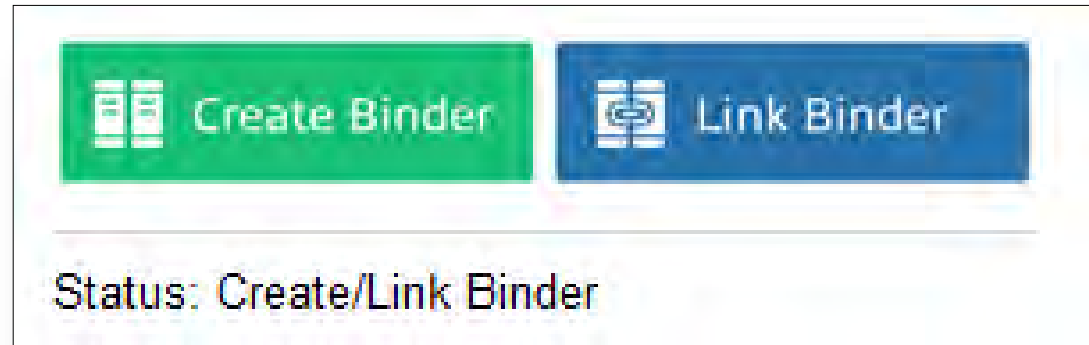
🔍 Search

↑ Status ✕

<input type="checkbox"/>	EDIT	⚠️ ↓	OPTIONS	CLIENT ID	MEMBERS	CLIENT NAME	BINDER ID	STATUS	SERVICE	LEADSHEETS	TAX
Status:											
<input type="checkbox"/>				[REDACTED]	1	[REDACTED]	9687822		1040SCAN PRO	Classic Leadsheets	ProS
<input type="checkbox"/>				[REDACTED]	1	[REDACTED]	9643570		1040SCAN PRO	Classic Leadsheets	ProS
<input type="checkbox"/>				[REDACTED]	1	[REDACTED]	9691960		1040SCAN PRO	Simplified Leadsheets	CCH
<input type="checkbox"/>				[REDACTED]	1	[REDACTED]	9692051		1040SCANverify Onshore	Simplified Leadsheets	CCH
<input type="checkbox"/>				[REDACTED]	1	[REDACTED]	9643589		1040SCAN PRO	Classic Leadsheets	ProS
<input type="checkbox"/>				[REDACTED]	1	[REDACTED]	9588342		1040SCANverify Onshore	Classic Leadsheets	CCH
<input type="checkbox"/>				[REDACTED]	1	[REDACTED]	9415236		1040SCANverify Onshore	Classic Leadsheets	ProS
<input type="checkbox"/>				A2b	1	Anderson, Jack	8033152		1040SCAN PRO	Classic Leadsheets	Lace
<input type="checkbox"/>				Simplified (V1)	1	TAXPAYER, TOM	9705487		1040SCANverify Onshore	Simplified Leadsheets	CCH
Status: In Verification											
<input type="checkbox"/>				[REDACTED]	1	[REDACTED]	9663534	In Verification	1040SCAN PRO	Classic Leadsheets	ProS
<input type="checkbox"/>				[REDACTED]	1	[REDACTED]	9663540	In Verification	1040SCAN PRO	Classic Leadsheets	ProS
<input type="checkbox"/>				[REDACTED]	1	[REDACTED]	9528759	In Verification	1040SCAN PRO	Classic Leadsheets	ProS
<input type="checkbox"/>				[REDACTED]	1	[REDACTED]	9643463	In Verification	1040SCAN PRO	Classic Leadsheets	ProS

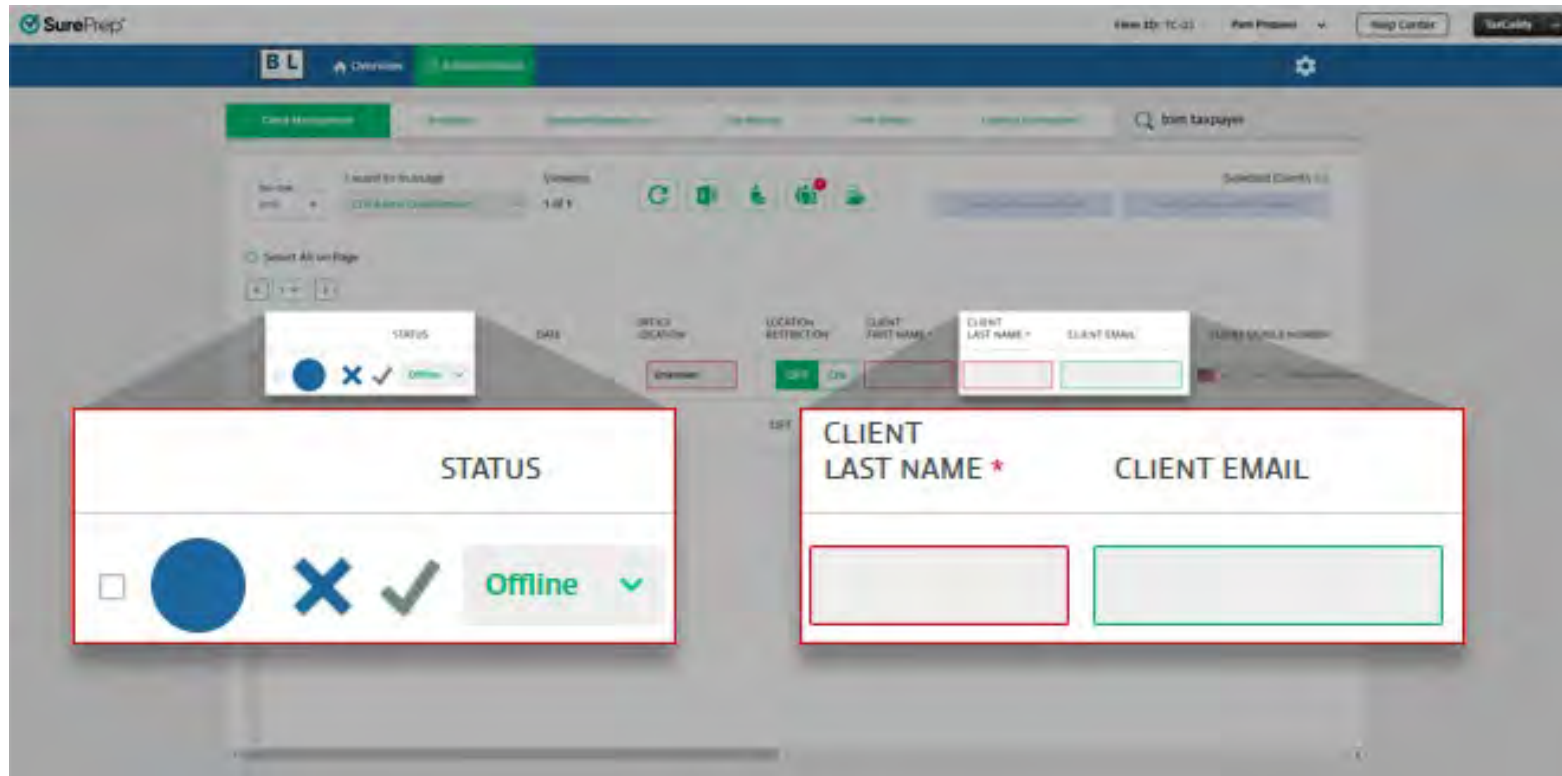
Link TaxCaddy to SPbinder

- Tax professionals will be able to link an existing binder in FileRoom to a newly connected client in TaxCaddy

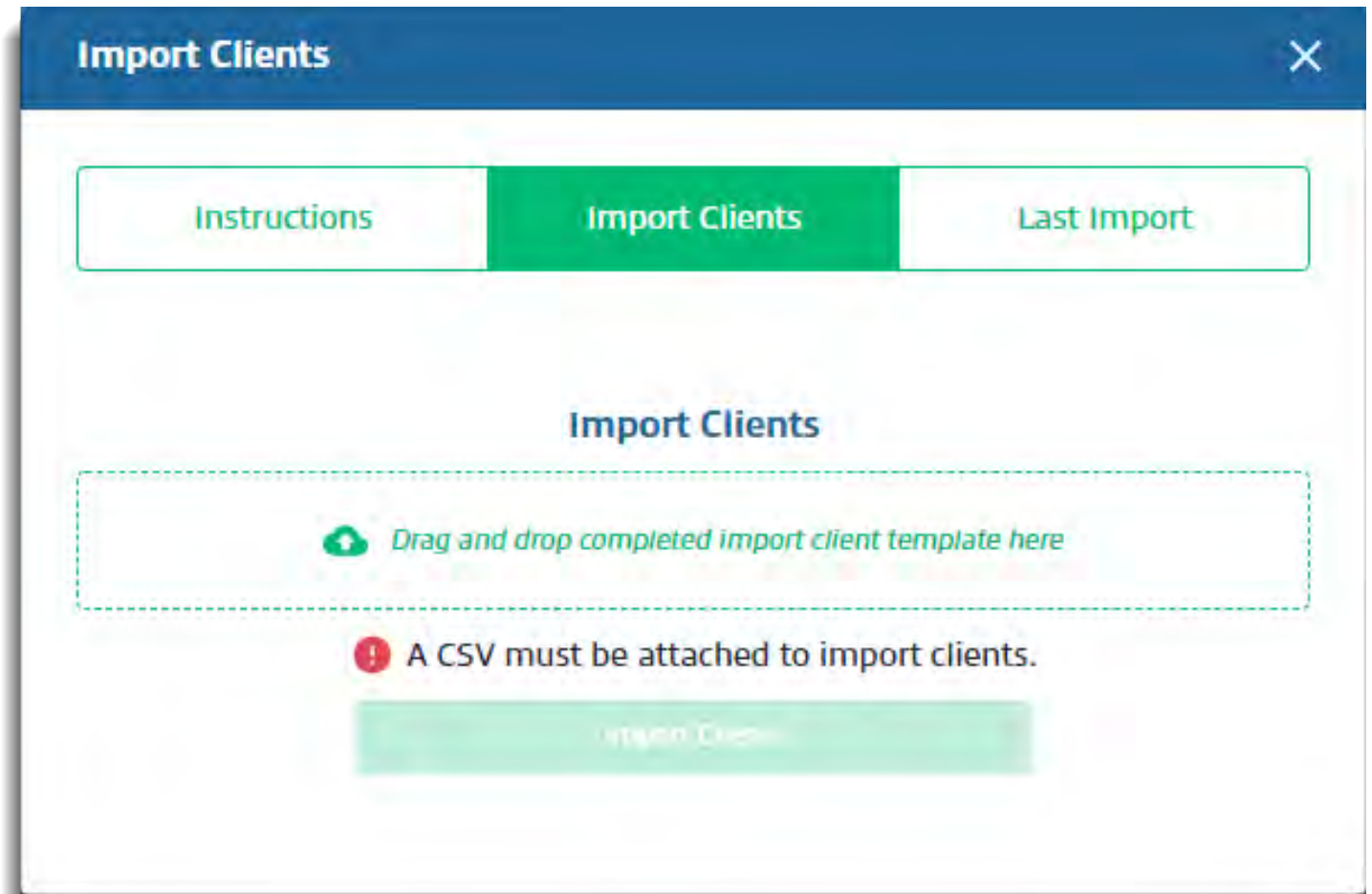


Improvements to Offline Accounts

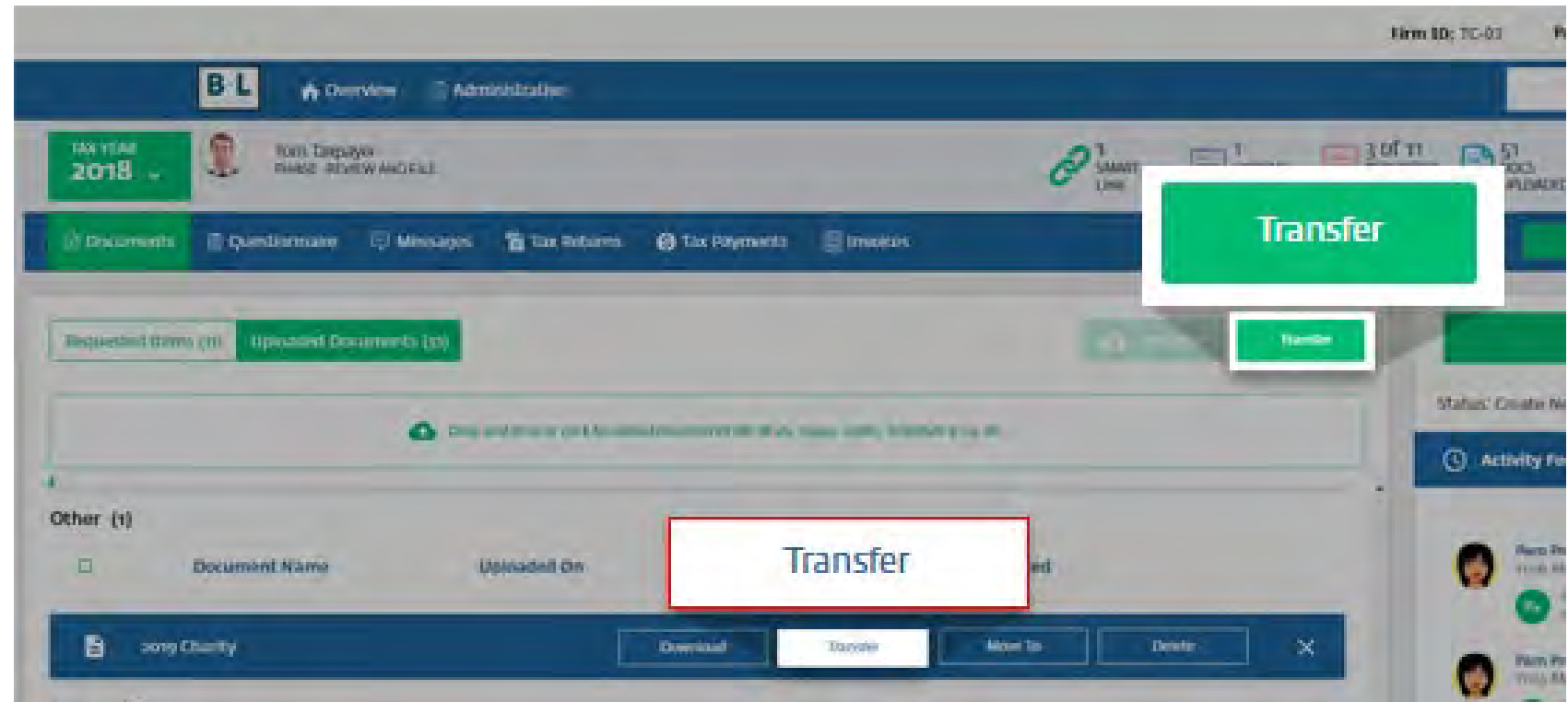
Tax professionals will be able to add offline clients without needing to populate the email field.



- Tax professionals will be able to import offline clients into TaxCaddy in bulk.



- Ability to transfer documents (copy) documents from one TaxCaddy client profile to another – Including between offline and connected clients



SurePrep APIs

- Ability to download PDFs for FileRoom binders
- Bookmark Only
- Ability to create 1041 binders

SurePrep

Q Search

INTRODUCTION

About SurePrep API

Authentication

Errors

HTTP Status Codes

State and City Codes

Versioning

Pagination

Request Limits

Coming Soon

REFERENCE

Authentication

Lookup Methods

Action Methods

INTRODUCTION

About SurePrep API

SurePrep's REST API enables users to integrate with the SurePrep FileRoom to automate and streamline their workflow. This API is organized around REST. We use built-in HTTP features, like HTTP authentication and HTTP verbs, which can be understood by off-the-shelf HTTP clients.

Authentication

Authentication to the API occurs via HTTP Basic Auth. Provide your API username, password and key to obtain an authentication token. You can then use this token to make API calls in a secure manner. All API requests must be made over HTTPS. Calls made over plain HTTP will fail. You must authenticate for all requests. All API requests will route through registered IP's only.

You should get an authentication token in response to your first request.

[GetToken \(POST\)](#)



Sneak Peek

- Full Text Search
- Document Flagging
- Tax Payment Processing



Q & A



Contact Info

Pete Miele

Pete.Miele@SurePrep.com

Sarika Arora

Sarika.Arora@SurePrep.com

www.sureprep.com



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019