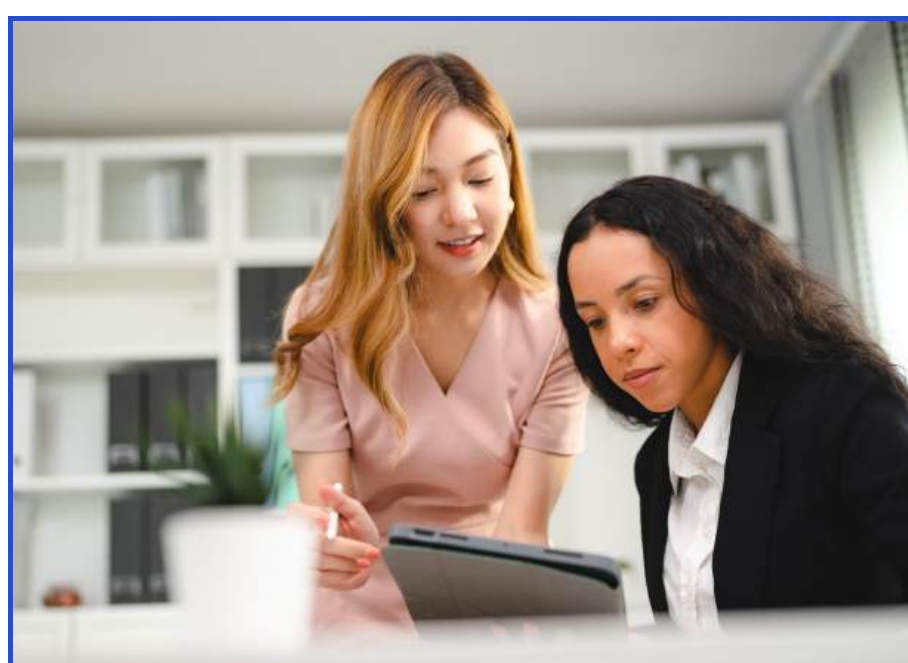


5

Things to Automate in Your Tax Workflow

1. Where Automation Does Its Best Work

Data import carries prior-year client information into new returns without re-entry. Electronic signatures replace the print-sign-scan routine. Automatic updates keep forms and rates current; each saves minutes individually and adds up across a full season.



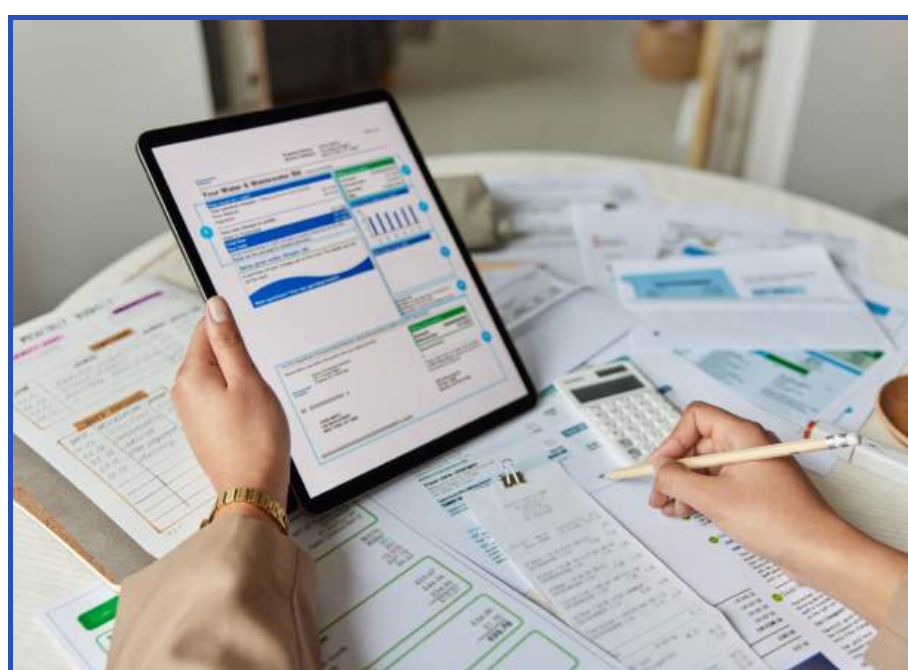
2. Let Your Software Flag Issues Before You Do

Diagnostics scan for calculation errors, missing fields, and e-filing issues before submission. The software flags the problem, and you determine the cause and resolution. That division keeps reviews fast without skipping the judgment calls software can't make.



3. Document Import and What Still Needs Your Eyes

OCR and import tools bring figures into returns faster than manual entry, but software can't verify them against the original document. Checking the W-2, 1099-B, and K-1 against source documents remains part of the process regardless of how the data is entered.



4. Complex Credits and Multi-State Returns

Software handles multi-state allocation and credit calculations, but the relevant facts must come first. Confirming move dates, checking reciprocity agreements, and evaluating whether a credit applies requires knowing the client's situation over the numbers.

5. Build the Workflow That Uses Both Well

Automation handles repetitive work, diagnostics catch errors, and document import shortens entry. What remains is verification and judgment, confirming the facts, evaluating the client's situation, and making the calls that numbers alone cannot answer.



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