



Chelsea Rustek

Tech and Tools: Tax





Our focus today is:

The 1040 side, in particular:

- Organizers
- Client Requests
- Supporting documentation
- Data Source Entry
- Trade Summaries

But how do we get that information?

- Mail
- Email
- Portals
- Texts
- Fax





Client Requests with Portals

Using our portals:

- Automated
- Reminders
- Templates
- No more attachments

Example: Sharefile

Projects > Tax Return


Tax Return

[Open](#) ...

CR [Share](#)


[Home](#) [Tasks](#) [Document requests](#) [Information requests](#) [Files](#) [Comments](#) +

Document requests [View all](#)




No document requests yet

Files [View all](#)



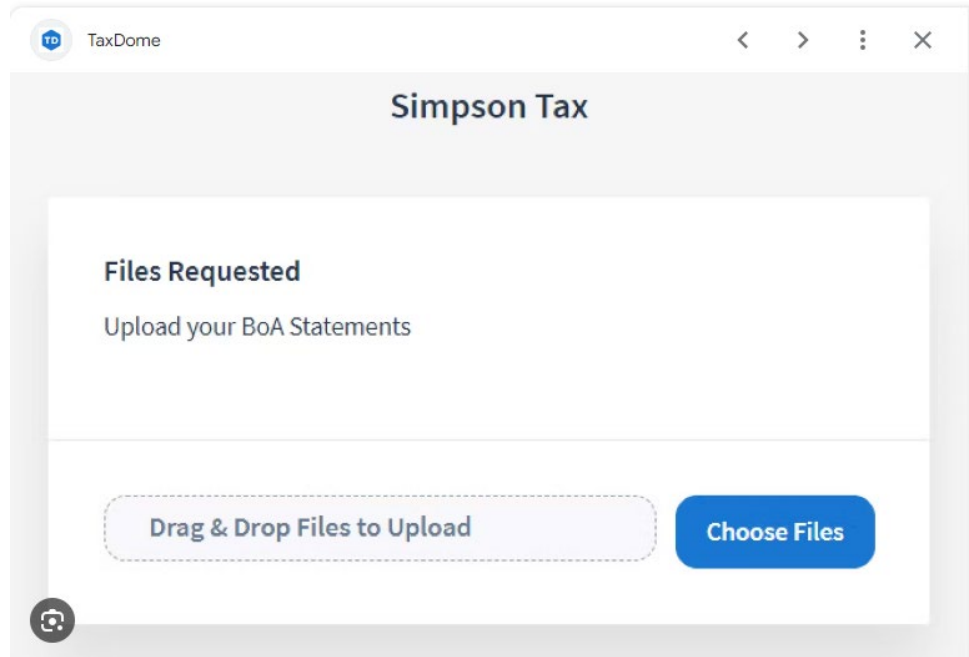
No files yet

Comments [View all](#)

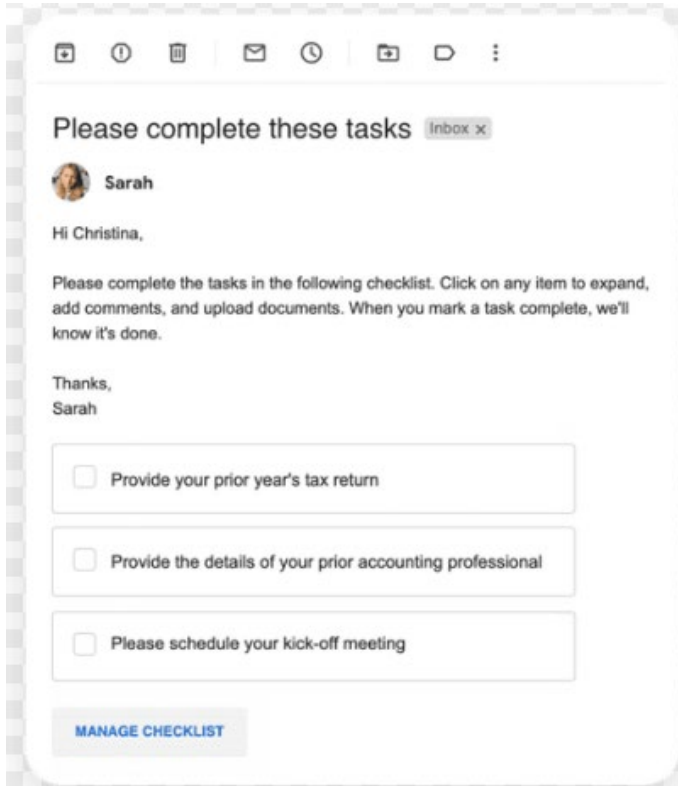


No comments yet

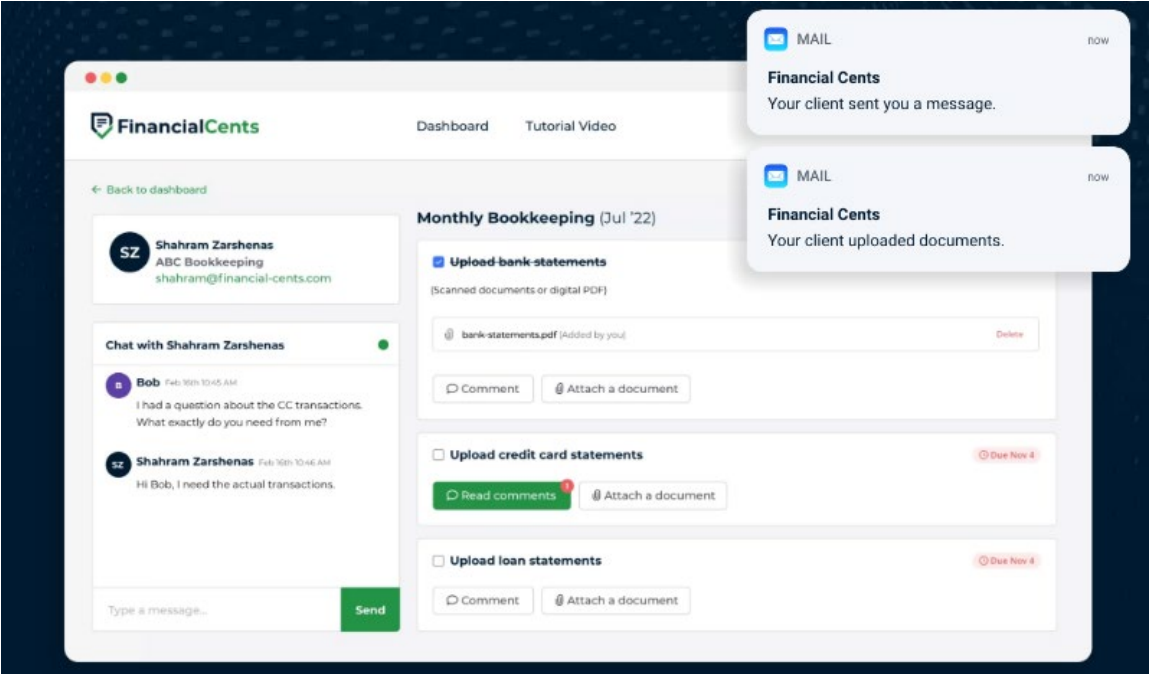
Example: Tax Dome



Example: Karbon



Example: Financial Cents



Bottom Line

Save the time.

Automate it.





Client Requests with Email

Do your clients respond to email better?

What do you do if you use email in conjunction with your portal?

Is there a way to make it easier?

.....maybe!

PhraseExpander Demo

Link to website: <https://www.phraseexpander.com/>



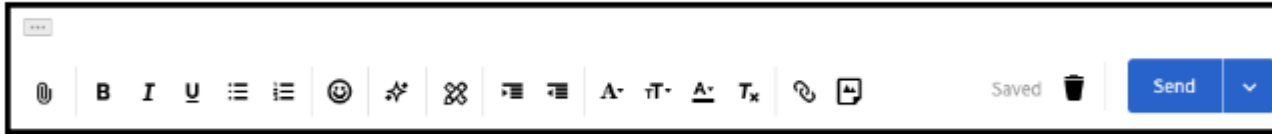
Text Expander

Link to website: <https://textexpander.com/>



AI with Email

Karbon AI email



Chat GPT

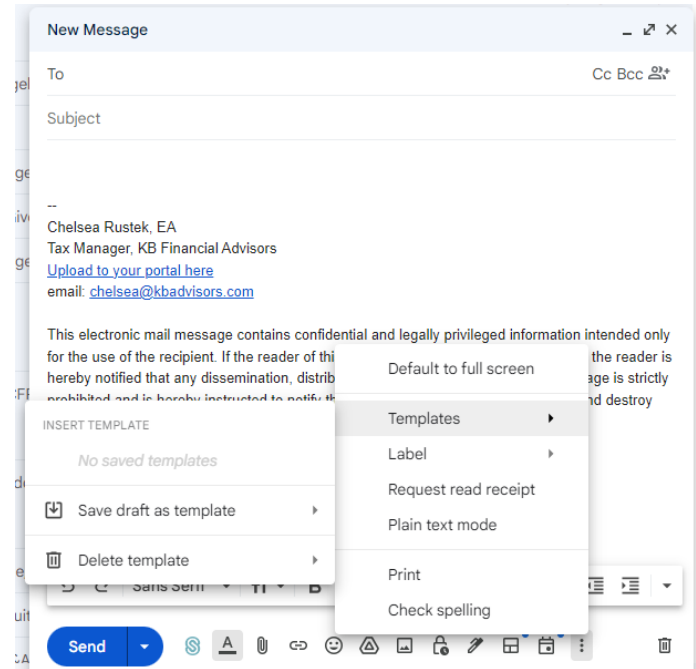


Templates

Turn on templates

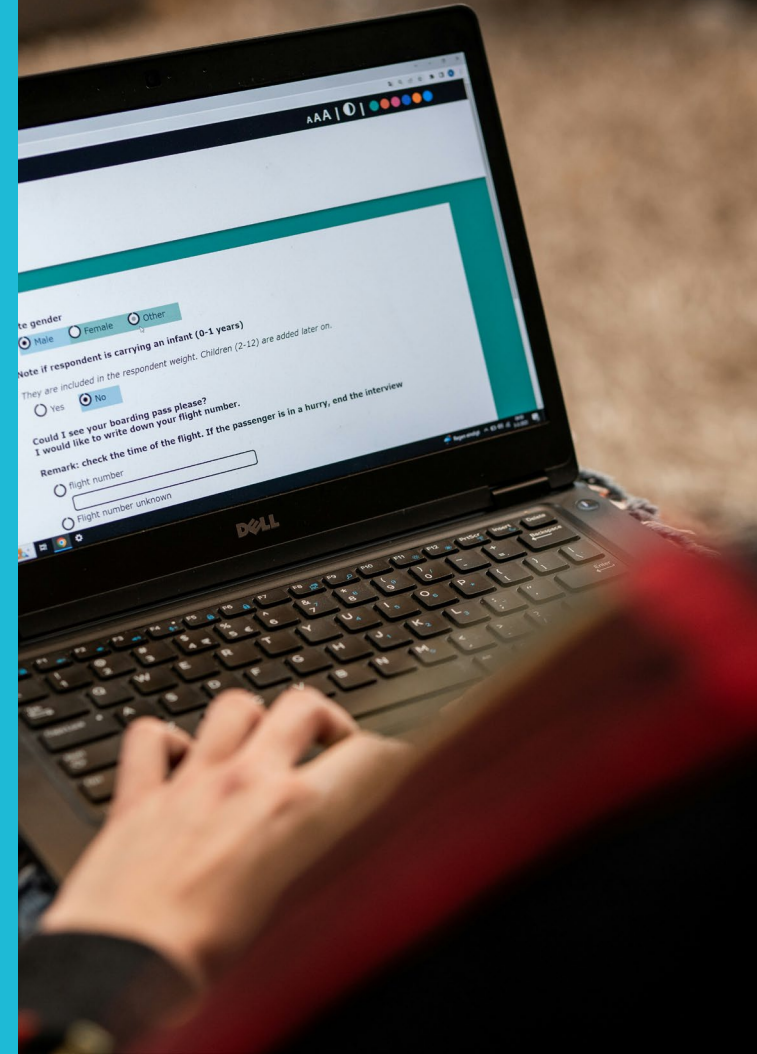
Important: You can only turn on and use message templates from Gmail on your computer.

1. On your computer, open [Gmail](#).
2. At the top right, click Settings **See all settings**.
3. At the top, click **Advanced**.
4. Next to “Templates,” click **Enable**.
5. At the bottom, click **Save Changes**.



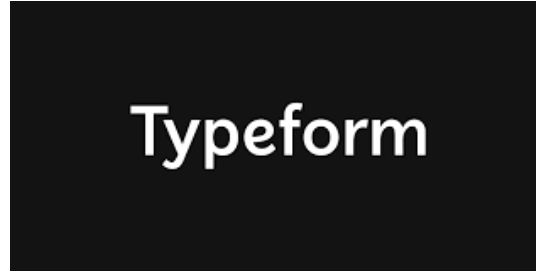
Organizers

- Mailing them?
- Static
- Long
- Painful
- Most include our questionnaire

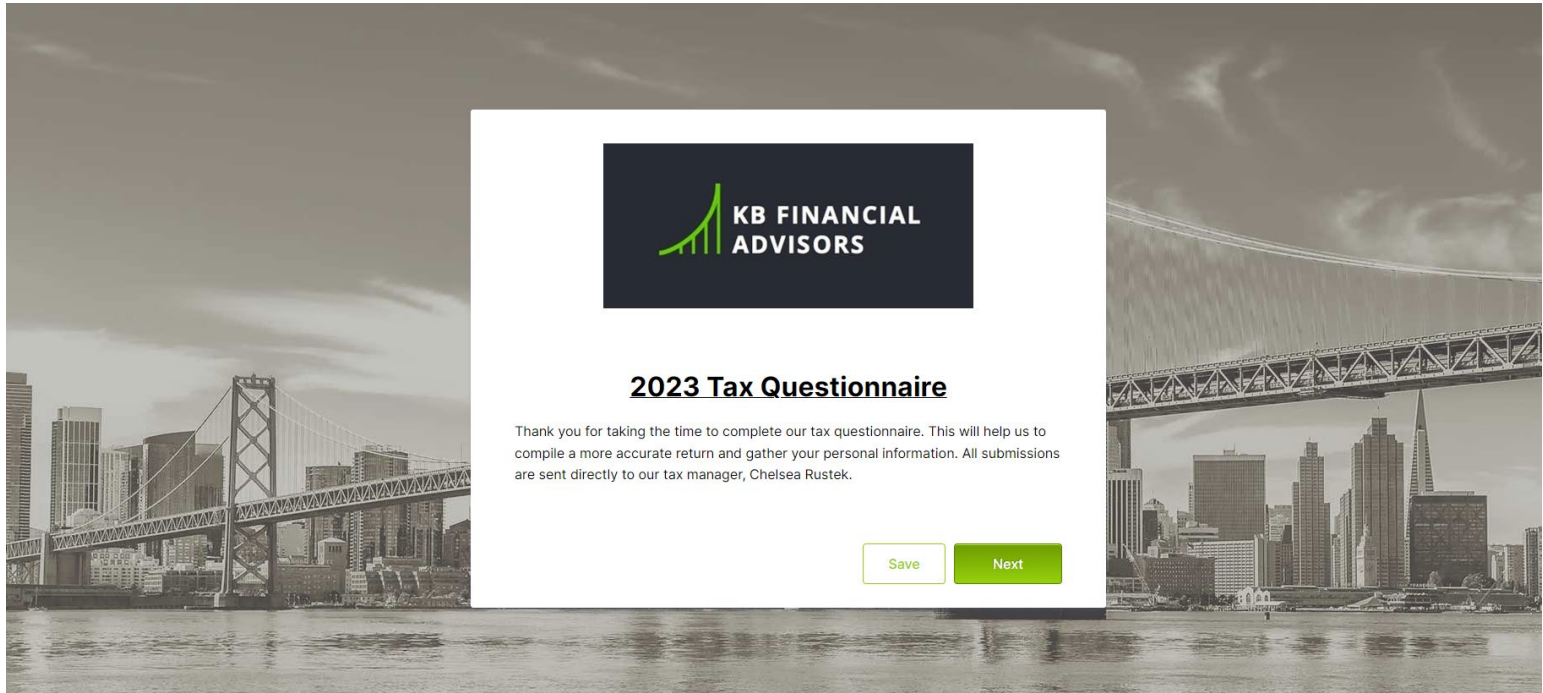


Interactive Questionnaire Options

- Jotform
- Cognito Forms
- Typeform
- Formstack
- Microsoft Forms
- Google Forms



Jotform Demo



Jotform Recap

Pros:

- Interactive
- Conditional Logical
- Easier user interface
- Web based
- Mobile friendly

Cons:

- Boilerplate
- Not customized to client
- No prior year info
- Rushed responses



Linking Questionnaires to Tax Software

- Soroban
- Stanford Tax
- Tax Caddy

- Built in tax software organizers:
 - UltraTax
 - CCH Axcess
 - Proconnect



StanfordTax

 Soroban

Other Document Request Technology

- Content Snare
- PandaDoc
- Knuula



Content Snare



PandaDoc

Knuula[®]

Supporting Documentation

- Training
- Replication
- Scalability
- Record keeping
- To hire or not?



Supporting Documentation: Gruntworx

<https://www.gruntworx.com/>

- Bookmarked
- Forms: Income, Deductions
- Organizers
- Misc: Notes, Receipts, etc.



Supporting Documentation:

Sureprep

<https://corp.sureprep.com/>

- Work within software
- Business or K-1s
- Tic and tie features
- Marked up workpapers



Supporting Documentation: Workpapers CS

- Built for UltraTax only
- Relies on OCR scan
- Can be for individuals, better for businesses.
- Trail Balance Software



Supporting Documentation: CCH ProSystem fx Scan

- Bookmarked
- OCR Technology
- Integrates with CCH ProSystem fx PDFlyer
- Can extract from excel





Delivery Techniques and Communications

- Portal for Tax Return Delivery
- Email alerts?
- Review meetings?
- Phone Calls?
- “Quick” Zoom Calls

Video Recording

- Loom
- Veed
- Tella



Video Recording Benefits

- Touch point
- Avoid meetings
- Less writing = less time
- Visual learners
- Complex issues
- AI tools built in



Step by Step Guides

- For clients
- For staff
- For third parties
- For colleagues

Use Case 1: Connect your QBO bank account

Use Case 2: How to import a spreadsheet from Gruntworx for Staff

Use Case 3: Creating a portal login



Drink the Kool-Aid slowly

- Your firm
- Your clients
- Your staff
- Your solutions

....the headache of too many?





Q&A

If you have any questions or concerns regarding this presentation, please contact the education department at education@naea.org.

NAEA



National Association
of Enrolled Agents

Office

*1100 G Street, NW, Suite 450
Washington, DC 20005, United States*

Telephone

(202) 822-6232

Email

info@naea.org