

Tax return preparation and review

Automates tax return preparation by gathering client data, preparing returns, conducting quality reviews, and routing for final approval. Reduces manual effort and ensures compliance during busy tax season.

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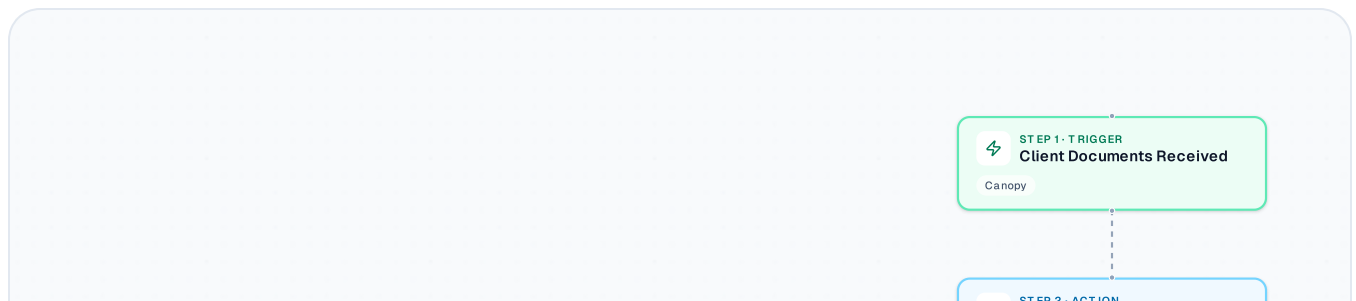
WORKFLOW TRIGGER



Client uploads tax documents to secure portal or tax season deadline approaches for existing client

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Client Documents Received

Client uploads W-2s, 1099s, receipts and other tax documents through secure client portal. System automatically organizes and validates document completeness.

2

 ACTION

Extract Financial Data

AI automatically extracts key tax information from uploaded documents and imports prior year data. Creates structured data set for tax preparation.

Canopy

QuickBooks

3

 ACTION

Prepare Draft Return

System generates initial tax return draft using extracted data and applies relevant deductions and credits. Flags potential issues or missing information.

Thomson Reuters UltraTax

CCH Axcess

4

 DECISION

Review Return Complexity

AI analyzes return complexity and risk factors to determine if automated review is sufficient or if senior reviewer assignment is needed.

Thomson Reuters UltraTax

5

 ACTION

Conduct Quality Review

Automated quality checks verify calculations, compliance requirements, and optimal tax strategies. Senior reviewer handles complex cases flagged

by decision step.

AI Business OS

Thomson Reuters UltraTax Karbon

6

 ACTION

Route for Final Approval

Completed return is assigned to designated CPA for final review and e-signature approval. Client notification is prepared for delivery.

Karbon

Canopy

7

 OUT PUT

Deliver Completed Return

Approved tax return is automatically delivered to client through secure portal with filing instructions and payment processing if refund/balance due.

Canopy

Thomson Reuters UltraTax



Outputs

- Completed and reviewed tax returns
- Client delivery confirmations
- Quality control audit trail



Key Metrics

- Return preparation time reduction
- Review accuracy rate
- Client satisfaction scores



Tools & Integrations

- Canopy
- QuickBooks
- Thomson Reuters UltraTax
- CCH Axcess
- Karbon

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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