



## 1040SCAN vs. UltraTax SDP Comparison

[1040SCAN](#) automates more than five times the documents of UltraTax Source Document Processing. 1040SCAN includes our award-winning workpaper system, [SPbinder](#), to reduce preparer and reviewer time. Only SurePrep offers an optional OCR data verification service to maximize efficiency. When combined with SurePrep's newest 1040 productivity solution, [TaxCaddy](#), 1040SCAN delivers the most automated and streamlined 1040 process for both you and your clients.











1040SCAN  
automates more than  
**5X**  
the documents of  
UltraTax SDP

\*Based on current SDP factsheet

Here's how 1040SCAN and UltraTax SDP compare:

| Optical Character Recognition | 1040SCAN | UltraTax SDP |
|-------------------------------|----------|--------------|
| Organizer Pages               |          |              |
| Source Document Types         | 39       | 35           |
| Brokerage Statements          | 546      | 60           |
| Grantor Letters               | 42       | 0            |
| State K-1s                    | 22       | 0            |
| Functionality                 | 1040SCAN | UltraTax SDP |
| Integrates with TaxCaddy      |          |              |
| RESTful API available         |          |              |



| Functionality  | 1040SCAN  | UltraTax SDP  |
|--|---|---|
| Eliminates human verification for native PDFs <sup>[1]</sup> |  |  |
| Includes SPbinder <sup>[2]</sup>                             |  |  |
| Free Pre-Verification <sup>[3]</sup>                         |  |  |
| Optional Verification Service <sup>[4]</sup>                 |  |  |
| Optional Full Preparation Service                            |  |  |

1. 1040SCAN PRO and 1040SCANverify only.
2. SPbinder is SurePrep's award-winning workpaper system that integrates with PDF, Excel, Word and Outlook emails. UltraTax SDP offers PDF workpapers only.
3. In order to discover new 1099-B formats as early in the tax season as possible, SurePrep offers a Pre-Verification program at no cost.
4. With any scan-and-populate software, it's a best practice to verify OCR'd source document data for accuracy before it gets exported to tax software (UltraTax). Optionally, SurePrep can perform this verification for you.

## What are UltraTax users saying?

SurePrep is the leader in 1040 productivity for CPA firms. We deliver seamless integration with UltraTax to automate and streamline the entire 1040 process for both the taxpayer and CPA. Our solutions are used by more than 19,000 tax professionals ranging from Big 4 firms to sole practitioners to reduce administrative costs, automate workpaper preparation, maximize review efficiency and improve client service.

Our award-winning solutions deliver meaningful savings to the bottom line. But don't take our word for it, we used a third party to survey our customers who use UltraTax.

SUREPREP CUSTOMER STATISTIC

SurePrep increases profitability for UltraTax users

72% of surveyed UltraTax users reported increased 1040 realization rates of 10% or more.



Source: TechValidate survey of 36 users of SurePrep

 Validated Published: Aug. 15, 2017 TVID: 984-87D-580

 SurePrep®

 TechValidate

View customer quotes at [sureprep.com](http://sureprep.com)