

## 1040SCAN vs. UltraTax SDP Comparison

[1040SCAN](#) automates more than seven 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 client collaboration platform, [TaxCaddy](#), 1040SCAN delivers the most automated and streamlined 1040 process for both you and your clients.

**1040SCAN**  
automates  
**7x**  
as many documents as  
**UltraTax SDP**

\*Based on current SDP factsheet

Document & Field Coverage	1040SCAN	UltraTax SDP
Organizer Pages	✓	✗
Source Document Types	39	35
Brokerage Statements	582	60
Exports Margin Interest	✓	✗
Exports Investment Fees	✓	✗
Exports Foreign Income	✓	✗
Exports 65+ Other Fields	✓	✗
TaxCaddy Fillable PDFs	✓	✗
Grantor Letters	42	0

Integrations	1040SCAN	UltraTax SDP
Includes SPbinder <sup>[1]</sup>	✓	✗
Integrates with TaxCaddy	✓	✗
RESTful API Available	✓	✗
Verification of OCR Accuracy	1040SCAN	UltraTax SDP
Eliminates Human Verification for Native PDFs <sup>[2]</sup>	✓	✗
Optional Verification Service <sup>[3]</sup>	✓	✗
Free Pre-Verification <sup>[4]</sup>	✓	✗
Optional Full Preparation Service	✓	✗

1. SPbinder is SurePrep's award-winning workpaper system. It supports Outlook emails, Excel, Word, PDF, and TIFF files.
2. 1040SCAN PRO and 1040SCANverify only.
3. With any scan-and-populate software, it's best practice to verify OCR'd source document data for accuracy before it exports to tax software (UltraTax). Optionally, SurePrep can perform this verification for you.
4. 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.



**What are UltraTax users saying?**  
 View customer quotes at [bit.ly/sptechv](https://bit.ly/sptechv)