



LARGE NYC FIRM
AUTOMATES
WORKFLOW
WITH SUREPREP
TECHNOLOGY
Janover LLC

Janover LLC

Share Their Firm's Story

Interviewed: Steven Hart, Chief Information Officer
Janover LLC



Stats at a Glance

Goals: Digitize and automate workflow to increase efficiency and eliminate bottlenecks.

Office locations: Garden City, NY and New York City, NY

Employees: 220

Website: www.jrllc.com

Association Membership: AGN International

Tax Software: CCH Access Tax

SurePrep Solutions: 1040SCANverify, 1040SCAN PRO, SPbinder, TaxCaddy, Outsource, API

Introduction

Since setting up shop in 1938, Janover LLC has grown from a small family practice into an award-winning powerhouse with over 200 team members. The firm has maintained its successful trajectory by embracing change and adapting to the times.

Steven Hart, Chief Information Officer, played a leading role in transitioning Janover into the era of cloud-based technology. In collaboration with SurePrep's Client Success Team, he helped Janover rebuild digital infrastructure and resolve workflow bottlenecks with automation.

“The way we were doing things before was not going to enable us to be successful and profitable in the future. We can't be a modern firm and grow the way we want to grow if we don't make some significant changes and investments into our technology.”

— Steven Hart, Chief Information Officer,
Janover LLC

Janover adopted SurePrep solutions in 2020 to streamline their 1040

tax process. Implementing [TaxCaddy](#), [1040SCAN](#), [SPbinder](#), and [SurePrep APIs](#) helped them:

- Automate preparation
- Increase standardization
- Minimize seasonal hiring
- Reduce workload compression for admins
- Improve employee retention

Automating work and elevating preparers

Janover eliminated data entry, Optical Character Recognition (OCR) verification, and workpaper organization with 1040SCAN, the most powerful scan-and-populate solution on the market.

1040SCAN recognizes five times as many document types as CCH® ProSystem fx® Scan and AutoFlow, including Grantor Letters and State K-1s. In addition, 1040SCAN's patented, AI-powered technology auto-verifies OCR data for 65% of standard documents.

“ No one I’ve ever spoken to said that the CCH SCAN product was superior to SurePrep’s. It’s not bad technology, but I know it’s not nearly as robust.

— Steven Hart, Chief Information Officer,
Janover LLC

Steven noted that, depending on the partner, **the firm saw time savings as high as 40% on preparation.** Their preparers used that newfound time to focus on more specialized work—even becoming first-line reviewers.

“ There’s an enormous amount of savings on the prep side. It’s unequivocal. There’s no debate.

— Steven Hart, Chief Information Officer,
Janover LLC

Scaling a standardized process

One of the most common challenges for tax and accounting firms is maintaining consistent processes. Large firms like Janover that delegate oversight among multiple partners and managers are especially prone to variables.

Since adopting SurePrep solutions, the firm found that standardization occurred naturally. SurePrep’s end-to-end integration creates a workflow structure that guides tax professionals through the 1040 process in sequential steps.

1040SCAN also automatically organizes workpapers into a standardized index that follows the flow of the tax return. Reviewers can expect binders to be indexed in the same order no matter who prepared them. For Janover, these features helped unify 1040 preparation across their entire tax department.

“ We have a consistent process for all 1040s. Every return is the same whether you’re working for Partner A or Partner B. You don’t have to worry about how things are done anymore.

— Steven Hart, Chief Information Officer,
Janover LLC

Supporting staff and clients by outsourcing verification

Janover divided their 1040 workload between three levels of service:

- [1040SCAN PRO](#): OCR data is verified by internal staff.
- [1040SCANverify](#): OCR data is verified by SurePrep staff.
- [Outsource](#): SurePrep staff oversees the entire preparation phase.

According to Steven, the firm experienced significantly improved realization with 1040SCANverify compared to 1040SCAN PRO.

Janover's decision to outsource verification wasn't about reducing full-time staff. Instead, the firm was trying to prevent the need to hire seasonal staff each busy season. Steven believes that the cost difference between 1040SCAN PRO and 1040SCANverify was marginal compared to the expense of hiring and training temporary employees from an increasingly limited talent pool.

“In this staffing market, you can't rely on getting all the staff you want. Outsourcing doesn't save you jobs, it saves you attrition and burnout.”

— Steven Hart, Chief Information Officer,
Janover LLC

SurePrep preparers and verifiers operate from facilities in Irvine, California and Mumbai, India. Firms can choose whether to outsource returns offshore or onshore, and Janover chose both.

The ability to reduce turnaround time and workload compression without adding staff made 1040SCANverify and Outsource integral parts of Janover's workflow. Going forward, Steven expects the firm to transfer all 1040SCAN PRO returns to the 1040SCANverify service.

Driving automation further with APIs

After streamlining preparation in Year 1, Janover identified further opportunities for improvement at the administrative level. Steven crunched the numbers and realized they were “losing” an entire day in administration.

“ We were relying on administrative staff to create the binders and add workpapers to the binders ... and we were losing a lot of time because they simply could not keep up with the workload.

— Steven Hart, Chief Information Officer,
Janover LLC

In Year 2, Janover used SurePrep’s REST API to automate and streamline various tasks throughout the administrative phase of their 1040 process.

SurePrep’s Developer Portal supplies clients with [dozens of free APIs](#) to make their software integration more efficient, customizable, and user-friendly. Janover implemented a combination of APIs to:

- Automate binder submissions
- Automatically add workpapers
- Automatically print Dream Workpapers
- Send automatic status updates

“Now it’s easy. Now I can just take the APIs and say, ‘Okay, When the workflow status hits X, go and grab that content and send it up to SurePrep,’” Steven explained. By the end of busy season, Steven calculated that the firm gained an entire day back in the

1040 process by eliminating excess hours at the administrative level.

“ We utterly eliminated [the lost day] because we had the automation in place. Depending on the time of year, that’s a pretty important 24 hours.

— Steven Hart, Chief Information Officer,
Janover LLC

Next year, the firm plans to implement additional APIs to simplify taxpayer collaboration with TaxCaddy. Such features enable firms to automatically create client accounts, automatically unsubscribe clients, and automatically create and send document request lists.

Improving staff recruitment with modern technology and hybrid flexibility

There are several factors that go into cultivating an award-winning workplace. One element that seems to persist is adaptability.

Firms hoping to attract and retain staff have been forced to adjust, especially as employee preferences for modern technology and remote work have grown. Steven credits Janover's teambuilding success to strong leadership and digital infrastructure reinforced by SurePrep.

Young tax professionals entering the industry understand what automation is capable of and therefore have less tolerance for time-consuming manual work. Steven acknowledged that eliminating data entry doesn't only improve efficiency—it makes Janover a more attractive destination for the next generation of tax professionals.

“What you're solving is congruent with what the younger generation wants to do. No one went to college, studied accounting, and passed their CPA exam to copy a number from Box 3.

— Steven Hart, Chief Information Officer,
Janover LLC

SurePrep's enablement of an end-to-end remote 1040 workflow has also helped the firm adapt to the new realities of the workplace. Steven shared that while there are natural growing pains when

collaborating with remote employees, any firm can overcome them with the right digital solutions and mindset.

“I put a lot of emphasis on being better managers. Do that. Then there's no reason we can't be an amazingly efficient firm and manage people remotely,” Steven said. He also pointed out that in a market where qualified employees are increasingly scarce, remote capability can help the firm expand its search beyond the NYC area.

“There's a talent pool out there and if we aren't limited by geography, then the sky's the limit.

— Steven Hart, Chief Information Officer,
Janover LLC

Designing a firm for the future

Janover's decades of growth wouldn't be possible without a willingness to change. Adopting SurePrep solutions has helped them adapt to the digital era of 1040 prep and positioned them for continued success.

“ [SurePrep’s] a differentiator for a firm. I think it’s necessary technology. Any firm that’s growing, it will help align your processes.

— Steven Hart, Chief Information Officer,
Janover LLC

Replacing old, familiar processes can be discomfoting, but with the assistance of SurePrep’s Client Success Team and year-round customer support, you won’t be alone. Steven believes that SurePrep is a long-term solution for any firm. “Buckle up. Remember the long game,” Steven emphasized. “It’s undoubtedly a worthwhile initiative and it’s going to make your firm better.”

Can you streamline preparation as much as Steven?

Janover nearly cut their preparation process in half. What kind of ROI could you realize with similar time savings? Our data-driven ROI calculator can generate custom projections for you.

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[Portland accounting firm upgrades from CCH ProSystem fx Scan to SurePrep technology](#)

[Learn all about 1040SCANverify](#)

[Alleviating staffing concerns by leveraging automation with outsourcing](#)

About SurePrep

SurePrep was founded in 2002 and is the leader in 1040 tax automation. We deliver seamless integration with your existing tax software to streamline the entire 1040 process for both taxpayer and tax professional. Over 32,000 tax professionals use SurePrep solutions, ranging from Big 4 firms to sole practitioners. Firms use SurePrep solutions to reduce administrative costs, enable remote work, automate workpaper preparation, maximize review efficiency, and improve client service.

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