

intuit Accountants

New for 2021 ProSeries

Product Changes and Enhancements

Julie Kozloski
Senior Product Manager

Julie Kozloski

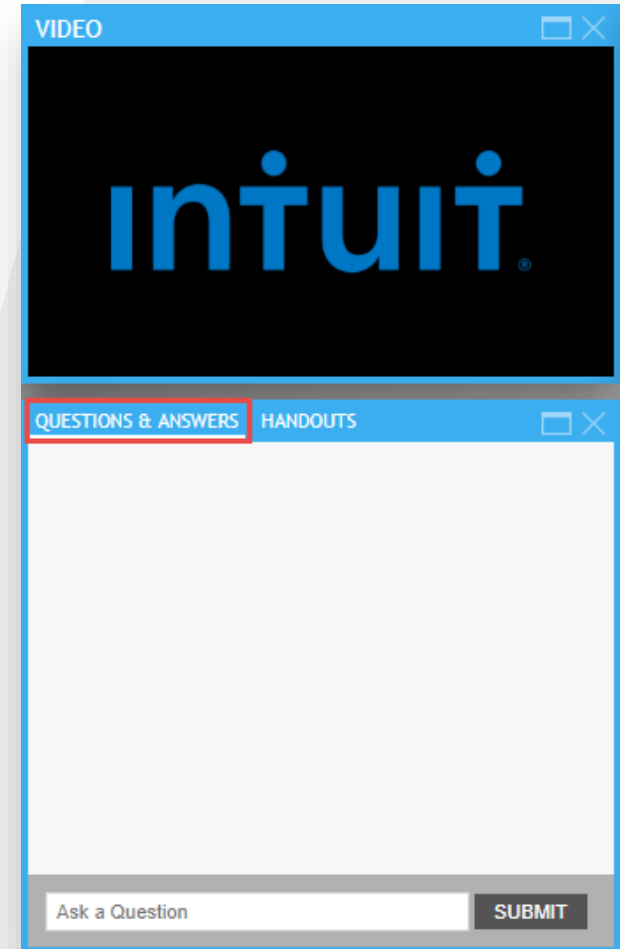
Senior Product Manager

- **Manager of ProSeries Tax product**
- **Expert in electronic filing and Pay-by-Refund**
- **25 years with Intuit**



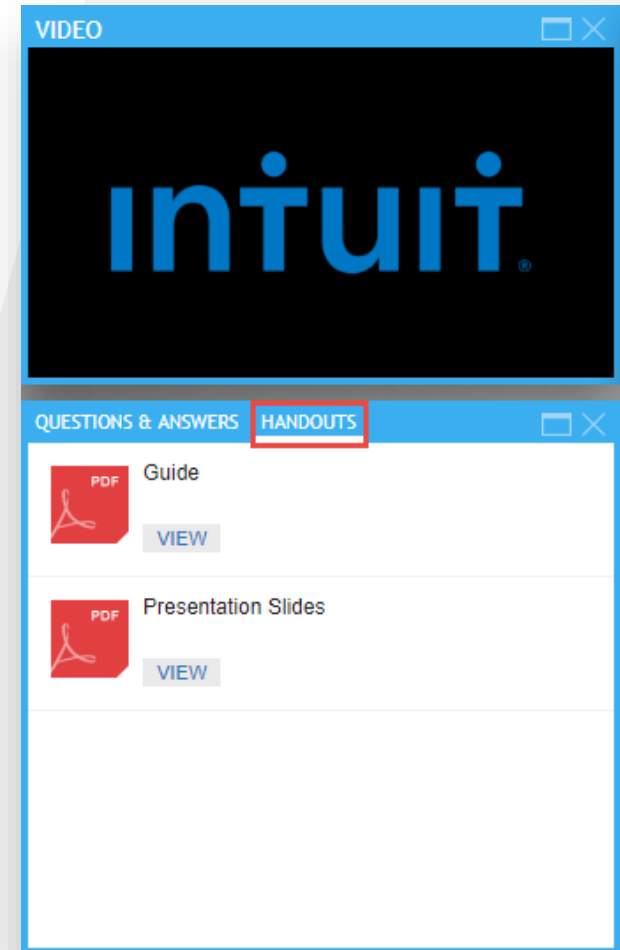
Housekeeping

- Please utilize the “Questions & Answers” panel if you have a question.
 - *Submitted questions will not be visible until they are answered.*
 - *We will attempt to answer all questions during the presentation and/or during the live Q&A session at the end.*
- Webcasts will stream audio exclusively through your computer speakers.
- For System Requirements, Policies, and Troubleshooting please go to the [STUDIO Attendee Help Guide](#).



Handouts

- Handouts are accessible via the Handouts panel.
 - Click “View.”
 - The handout will automatically start downloading in a new window.
 - Click the downloaded file to open or save it.
- A download link *may* also be available in the reminder email for the presentation.
- A recording of this presentation will be made accessible (using the same log-in credentials) shortly after the session concludes.



CPE Process

This webinar is eligible for **1** hour(s) of CPE/CE credit. In order to receive CPE/CE credit:

- You must answer 75% of the checkpoint pop-ups throughout the training.
- You must attend a minimum of **50** minutes. Only the LIVE version of the webinar is eligible.
- If all requirements are met, CPE/CE certificates will be available in the Course Completion Tracker widget.
- Interactive polling questions will occur throughout.
- A survey will generate after the event. Please complete the survey (please ensure your pop-up blocker is set to allow or check for any blocked pages).



Intuit is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.



- **Polling Question**

Appears in the Slides window.

- **Pop-up Checkpoint**

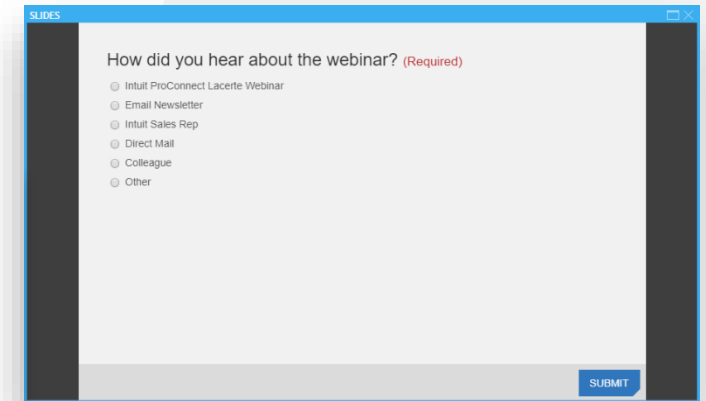
Appears overlaid on screen.

- **Course Completion Tracker**

Click on the widget to view your course status and to retrieve certificate after successful completion.

- **Survey**

Appears after the session closes. Please ensure that you have disabled the pop-up blocker for your web browser or click on the blocked pop-up at the conclusion.

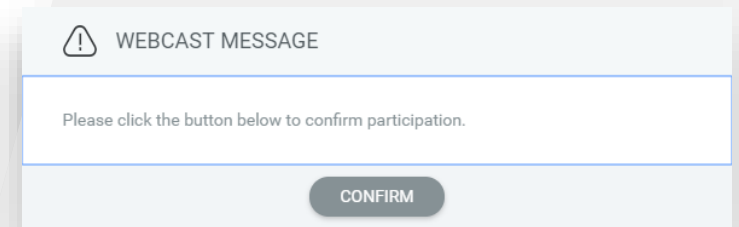


SLIDES

How did you hear about the webinar? (Required)

- Intuit ProConnect Lacerte Webinar
- Email Newsletter
- Intuit Sales Rep
- Direct Mail
- Colleague
- Other

SUBMIT

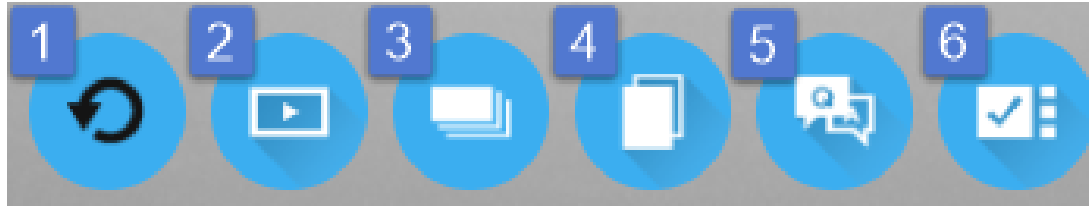


WEBCAST MESSAGE

Please click the button below to confirm participation.

CONFIRM

Widgets



1. Restore

- Restore all windows to default

2. Video

- Displays the Video window

3. Slides

- Displays the Slide window

4. Handouts

- Opens the Handouts panel

5. Questions & Answers

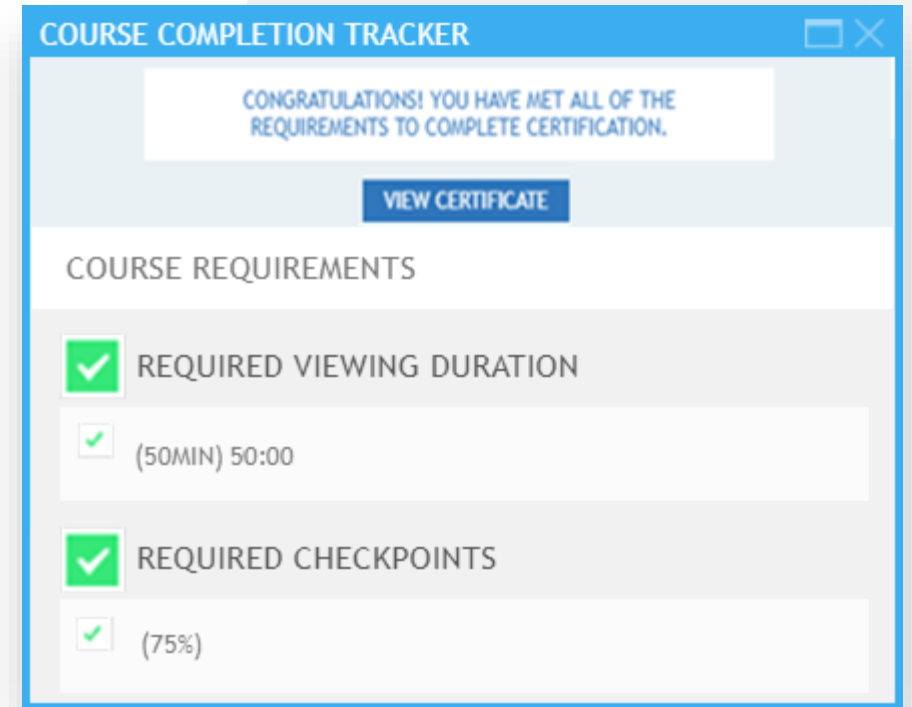
- Opens the Questions & Answers panel

6. Course Completion Tracker

- Monitors the requirements for CPE/CE Credit

Course Completion Tracker

- Please utilize the Course Completion Tracker in the widget bar to access your CPE/CE Certificate, if applicable.
- **The Required Checkpoints requirement will not show as completed until the webinar concludes.**
- If you do not meet the course requirements you will need to register for another accredited webinar.
- You may access the certificate at any time (in the Course Completion Tracker) after the session by utilizing the same link used to enter this session.
- If earned, the certificate will also be sent to the email address used to register for this webinar.



Q & A

During the session, use the Questions and Answers panel to submit questions and view responses

New e-file capabilities

New e-file returns

Returns (9)

Kansas City MO Individual Return (1)

Delaware Corporate, S-Corporation, Partnership & Fiduciary (4)

New Mexico Fiduciary (1)

Washington DC Corporate, Franchise, & Partnership (3)

New e-file Amended, Estimates, Extensions

Amended, Estimates, Extensions (13)

California Individual Amended

Colorado Individual Amended

North Carolina Individual Amended

Pennsylvania Individual Amended

Delaware Fiduciary Extension

New Mexico Fiduciary Amended

Washington DC - Corp & Partnership Amended, Corp & Franchise Estimates, Corp, Partnership and Franchise Extensions (7)



New Tax Forms

New Tax Forms - Federal

Individual

- Form 9000 Alternative Media Preference
- Form 8915-F, Qualified Disaster Retirement Plan Distributions and Repayments
- Form 14039-B, Business Identity Theft Affidavit
- Form 5471, Sch G-1, Cost Sharing Arrangement

Partnership

- Schedule K-2, Partner's Distributive Share Items - International
- Schedule K-3, Partner's Share of Income, Deductions, Credits, etc - International

S-Corporations

- Schedule K-2, Shareholders Pro Rata Share Items - International
- Schedule K-3, Shareholders Share of Income, Deductions, Credits, etc - International

New Tax Forms - Individual State

Arkansas

- Form AR 2441, Child and Dependent Care Expenses

California

- Form CA 3913, Moving Expense Deduction
- Form CA 3804CR, Pass -Through Entity Elective Tax Credit

Georgia

- Form IND CR-21, Adoption of a Foster Child for Adoptions Occurring in Taxable Years Beginning on or After January 1, 2021

Kansas

- Schedule A, Itemized Deductions

New Tax Forms - Individual State

Minnesota

- Schedule M1MB, Business Income Additions and Subtractions
- Schedule M1Loss, Minnesota Limitation on Business Loss

South Carolina

- Schedule TC-38, Solar Energy or Small Hydropower System or Geothermal Machinery and Equipment Credit

New York

- Form IT-6-SNY, Metropolitan Commuter Transportation Mobility Tax (MCTMT) for START-UP NY
- Form IT-203-F, Multi-Year Allocation Form
- Form IT-237, Claim for Historic Homeownership Rehabilitation Credit
- Form IT-252- Investment Tax Credit for the Financial Services Industry
- Form IT 636 - Alcoholic Beverage Production Credit

New Tax Forms - Business State

Alabama Partnership & S-Corporate

- Form PTE-E, Pass-Through Entity Election Form
- Form EPT, Electing Pass-Through Entity Payment Return
- Schedule EPT-K1, Electing Pass-Through Entity K-1
- Schedule EPT-C, Electing Pass-Through Credits
- Schedule PTE-AJA, Alabama Jobs Act - Investment Credit

Arkansas Corporate, S-Corporate & Partnership

- Form AR 8944, Paper e-file Hardship Waiver Request

California Corporate & S-Corporate

- Form CA 3544, Assignment of Credit

California Corporate, S-Corporate, Partnership, LLC & Fiduciary

- Form 593, Real Estate Withholding Statement

New Tax Forms - Business State

Hawaii Fiduciary

- Form N-40
- Schedule K-1, Beneficiary's Share of Income, Deductions, Credits , etc.
- Schedule CR, Schedule of Tax Credits
- Schedule AMD, Explanation of Changes on Amended Return
- Schedule D-1, Sales of Business Property
- Form 8582, Passive Activity Loss Limitations
- Schedule E (Form 1040), Supplemental Income and Loss
- Schedule D, Capital Gains and Losses
- Form N-40T, Allocations of Estimated Tax Payments to Beneficiaries
- Form N-201V, Business Income Tax Payment Voucher
- Schedule C (Form 1040), Profit or Loss From Business
- Schedule F (Form 1040), Fiduciary Income Tax Return

New Tax Forms - Business State

Indiana Fiduciary

- Schedule 1, Other Income

Indiana Partnership

- Schedule IN-EL, Tax Computation Form for Electing Partnerships

Kentucky Corporate

- Schedule NOL, Net Operating Loss Schedule

Massachusetts Corporate

- Schedule FE, Report with Respect to Foreign Entities
- Schedule FCI, Foreign Corporation Income of U.S. Shareholder

New Tax Forms - Business State

Minnesota Corporate & S-Corporate

- Schedule AA-1, Application for Section 42 Method of Apportionment

Minnesota Partnership & S-Corporate

- Schedule PTE, Pass-through Entity Tax

New Mexico Fiduciary

- Form FID-1, Fiduciary Income Tax Returns
- FID-B, Schedule 1, Computation of New Mexico Percentage Sch 2, Business Income Apportionment Formula
- Bene Info, New Mexico Beneficiary's Information
- FID-CR, Tax Credit Schedule
- FID-PV, Fiduciary Income Tax Payment Voucher
- RPD-41096, Application for Extension of Time to File

New Tax Forms - Business State

New Mexico Fiduciary continued

- FID-EXT, Fiduciary Income Tax Extension Payment Voucher
- FID-D, Fiduciary Pass-through Entity Withholding Detail Report
- PTW-PV, Pass-through Entity Withholding Detail (PTW-D) Report Tax Payment Voucher
- RPD-41373, Application for Refund of Tax Withheld From Pass-through Entities
- FID ES, Fiduciary Income Estimated Tax Payment Voucher
- RPD -41353, Owners or Remittee's Agreement to Pay Withholding on behalf of a Pass-through Entity or Remitter
- RPD-41375, NOL Carryforward Worksheet for Fiduciary Income Tax

New York Fiduciary

- Form IT-653, Pass-Through Entity Tax Credit

New York Corporate & S-Corporate

- Form CT-655, Restaurant Return to Work Credit

New Tax Forms - Business State

New York Fiduciary & Partnership

- Form IT-636, Pass-through Entity Tax Credit
- Form IT-252, Investment Tax Credit for the Financial Services Industry
- Form IT-655, Restaurant Return to Work

North Carolina Partnership

- Form NC-PE, Additions & Deductions for PTE's, Estates and Trusts

North Carolina Fiduciary, Partnership & S-Corporate

- Schedule NC K-1 Supplemental Schedule

South Carolina Corporate

- Form SC2220, Underpayment of Estimated Tax by Corporations

South Carolina Corporate & S-Corporate

- Form SC1120TC, Corporate Tax Credits

Product Changes and Enhancements

QuickBooks Integration

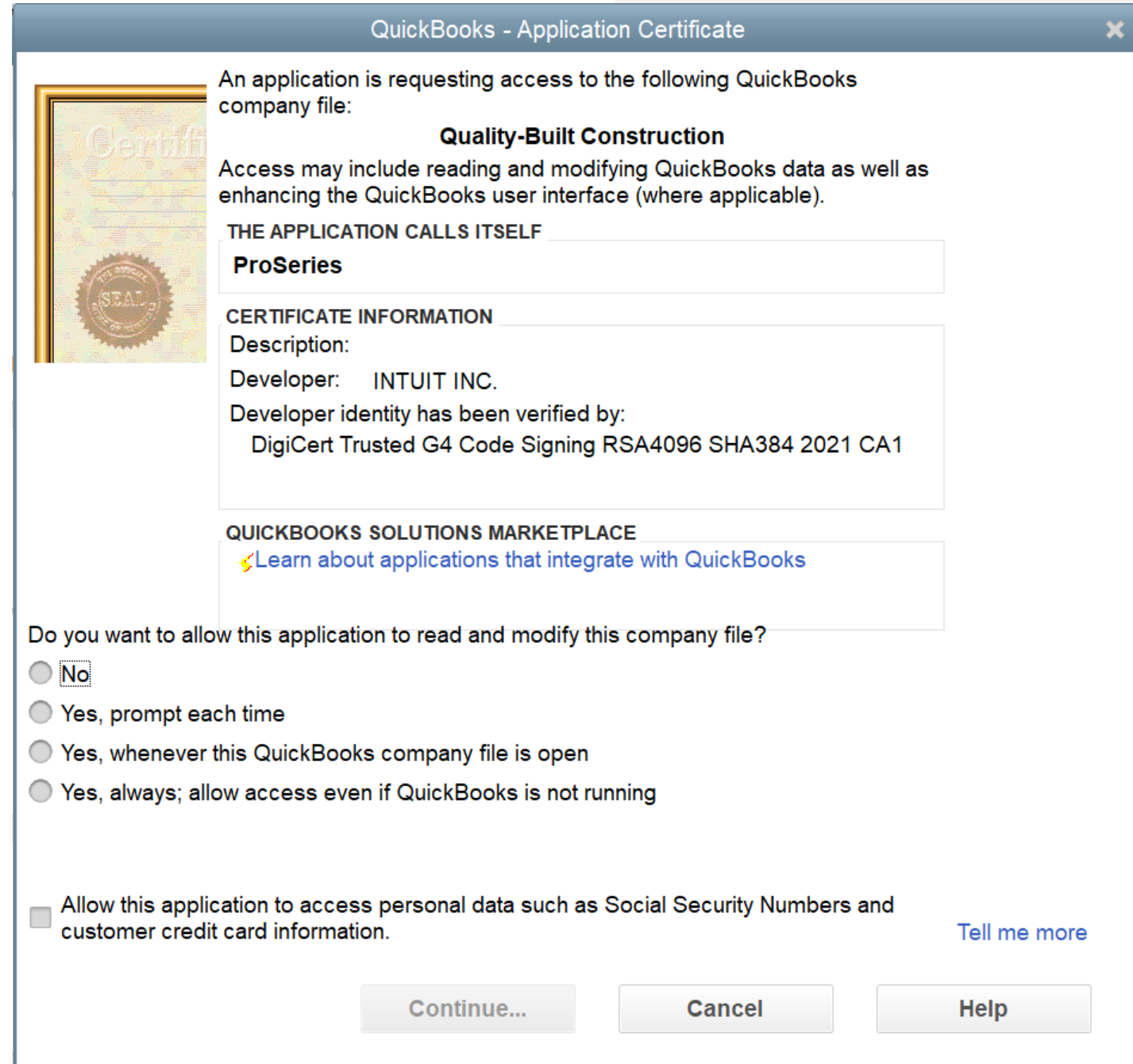
ProSeries Professional Only

- Updated experience importing QuickBooks data from Desktop QuickBooks Editions (Premier Accountants, Enterprise and PRO)
- Assign tax lines in QuickBooks or use the QuickBooks import screens to assign or change tax line assignments before updating the tax return with QuickBooks data.
- Easily view imported values and tax lines in the 'Data Source' under the Information menu in ProSeries
- If needed, all imported data can be deleted under the 'Import' menu in ProSeries

Coming Soon! Import from QuickBooks Online Accountants Edition

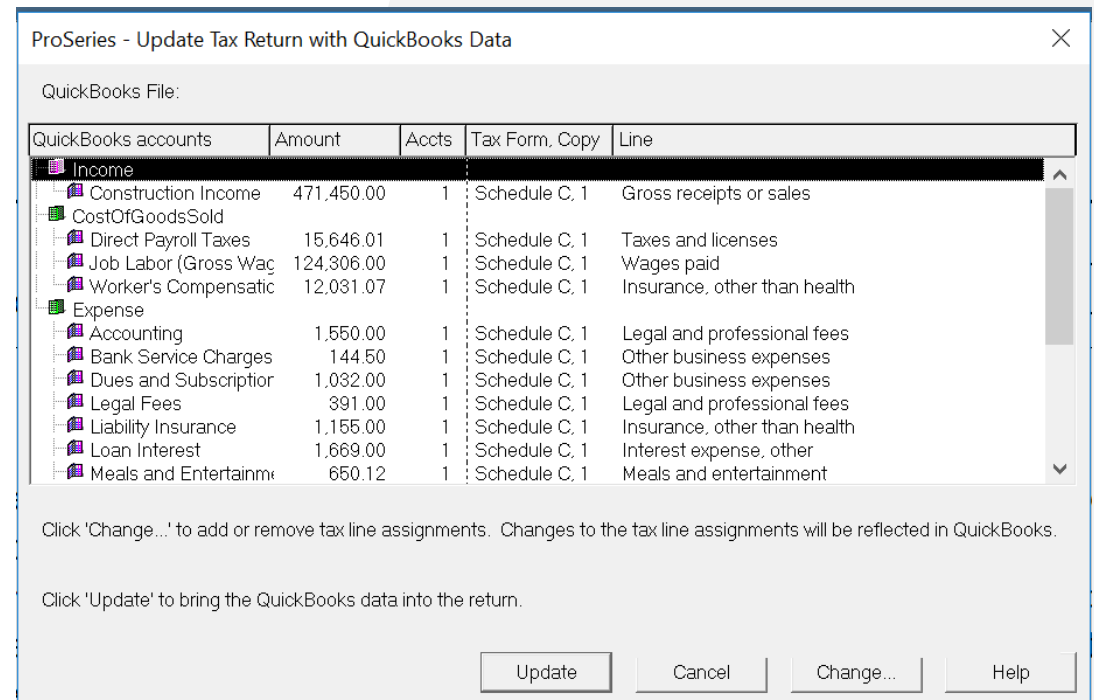
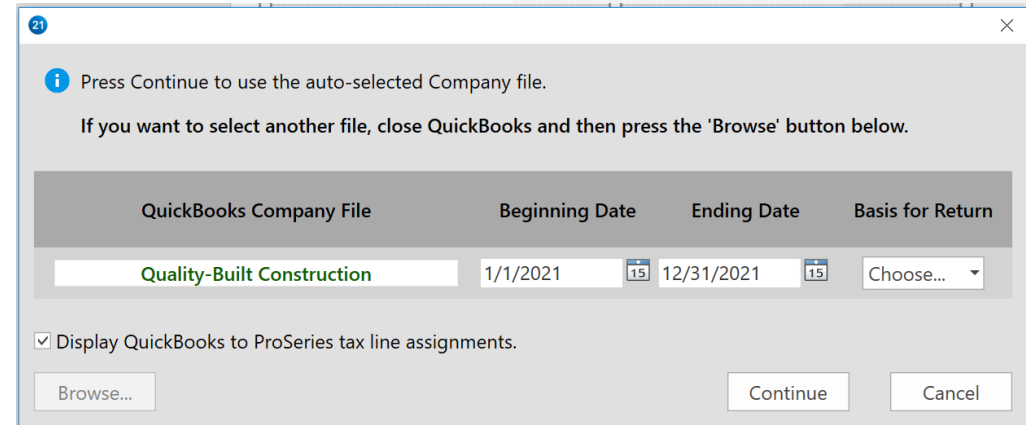
QuickBooks Integration

- The first time a QuickBooks company file is selected there is now a screen to grant access to the company
- Select your preferred access option and select 'Continue' to proceed importing into ProSeries



QuickBooks Integration New Screens

- The new Import screen will automatically detect the company currently open in QuickBooks. If QuickBooks is closed the 'Browse' button will be enabled to locate the company file to open
- By default the QuickBooks to ProSeries tax line assignments will be shown.
 - Select 'Change' to adjust tax lines
 - Select 'Update' to bring the QuickBooks data into the tax return



ProSeries HomeBase Functionality

ProSeries Professional and Basic HomeBase list grids have expanded ability to sort, filter and customize

- Changes to column width and order of columns are now automatically saved in every view
- Delete columns by selecting the column title with your left mouse button and dragging off the view
- Filter the view by any column using the filter icon available in the column title
- When a HomeBase view is filtered, the top of the view will show the filter and the filter icon for that column will appear in blue
Remove the filter by unchecking or closing the filter bar, clicking on the icon to clear the filter or selecting 'Reset current view' from the HomeBase menu

	<input checked="" type="checkbox"/>	Taxpayer E-mail Address Is blank					
			Client Name	File Name	Home Telephone	Taxpayer E-mail Address	
1			,	test1.21I			
2			Test, Taxpay...	lrg_test.21I	(540) 555-15...		**
3			Test, Taxpay...	lrg_client.21I	(540) 555-15...		**

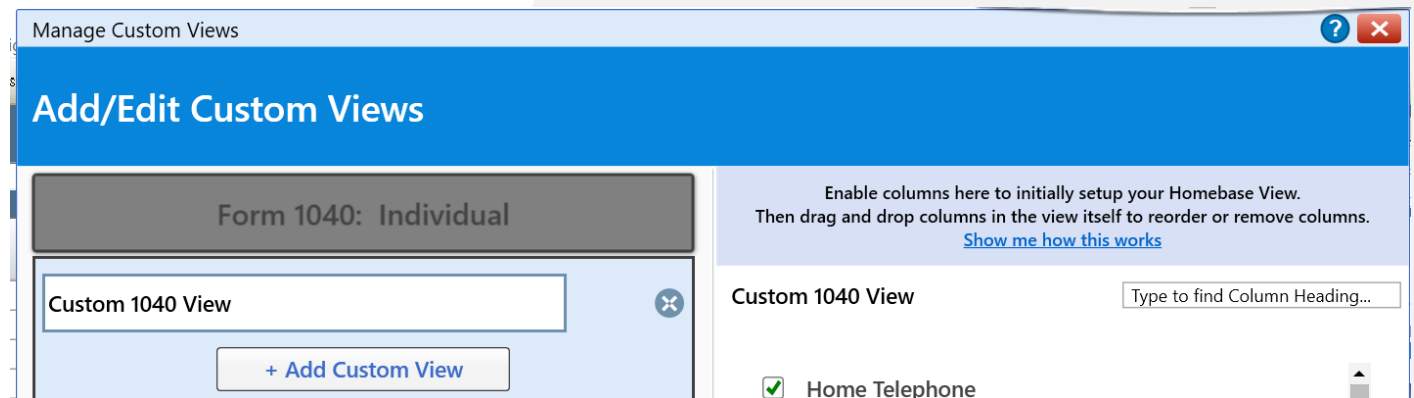
ProSeries HomeBase Functionality

- Zoom in and out using CTRL + and - or the wheel on your mouse. The HomeBase view can be reset from the HomeBase menu by selecting 'Reset Current View'

ProSeries Professional Only

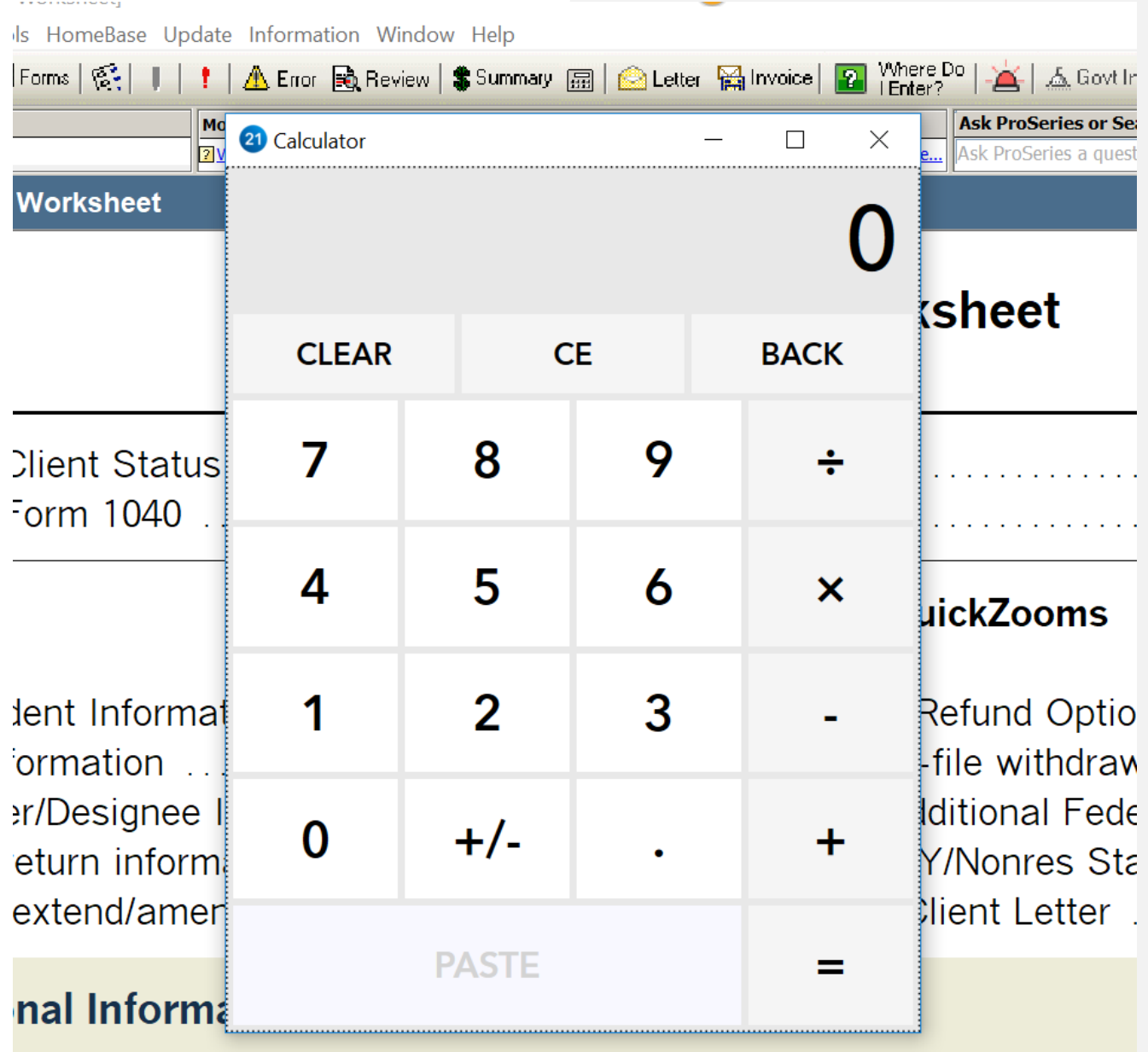
- Create advanced filters by selecting 'Query' from the HomeBase menu and using the Advanced Filter Editor.
- Create custom views by selecting the gear icon in the top left of the HomeBase view or by selecting 'Add/edit custom views' from the HomeBase menu
- If you created custom views in Tax Year 2020, ProSeries will automatically transfer those views to Tax Year 2021.

Easily delete views you no longer need and add new ones in 'Manage Custom Views'



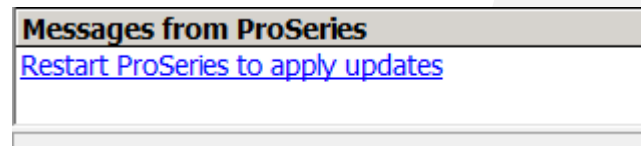
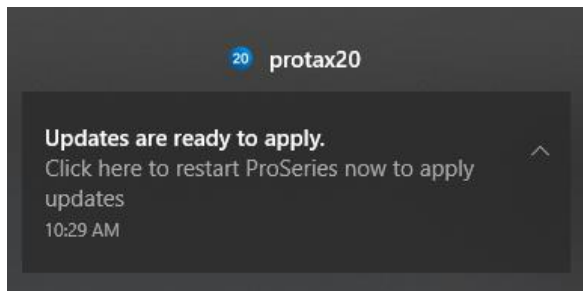
Refreshed ProSeries Calculator

- The integrated ProSeries calculator (CTRL + A or Tools>Calculator) now easier to use than ever allows you to resize the window and it responds to Windows font size changes
- Supports three types of data entry: Keyboard numbers/number pad, mouse clicks and keyboard arrows



Background Updater

- With background updates, ProSeries automatically downloads, verifies and installs updates whenever they're available.
- After updates are downloaded you'll be prompted to restart which you can do immediately or updates will automatically apply the next time you start ProSeries
- The ProSeries task scheduler is no longer used
- 'Messages from ProSeries' at the bottom of the HomeBase screen will display links when updates have occurred.



Prior Year Return Background Color

- In General options, select 'Show Previous Tax Year Color'
- Tax Year 2020 returns will now have a colored background allowing you to easily distinguish between the Tax Year 2021 return and the prior year return

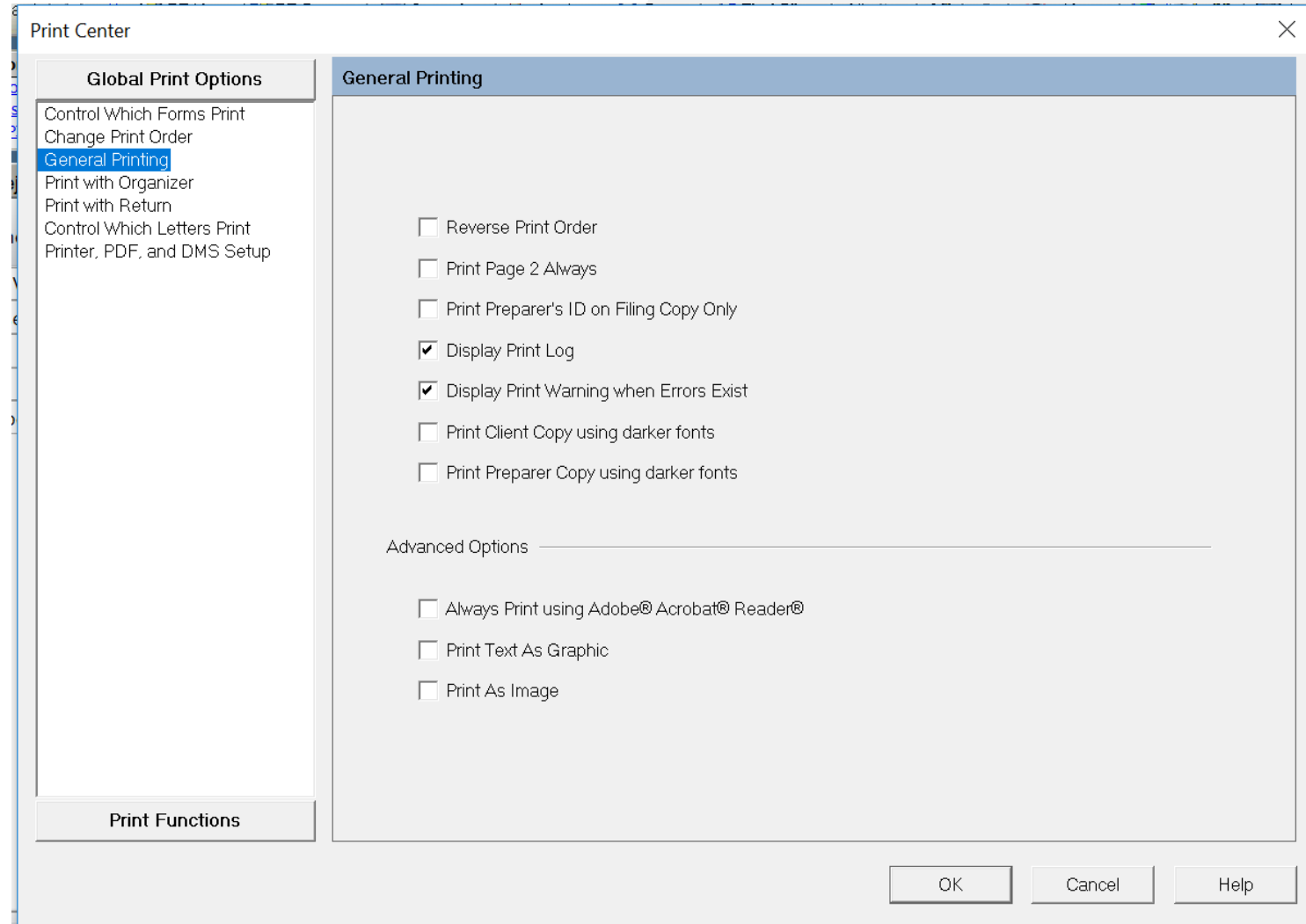
Note: To prevent changes to prior year returns. From HomeBase select Tools>Lock/Unlock Client Files

Form 1040: Individual Tax Return			Refund: \$1
Form 1040	U.S. Individual Income Tax Return		2020
Your First Name	MI	Last Name	Your Social Security No.
<u>Bruce</u>	<u> </u>	<u>Anderson</u>	<u>***-**-1111</u>
If Joint Return, Spouse's First Name	MI	Last Name	Spouse's Social Security No.
<u>Virginia</u>	<u> </u>	<u>Anderson</u>	<u>***-**-1112</u>
Home Address (No. and Street). If You Have a P.O. Box, See Instructions.			Apt. No.
<u>100 Main Street</u>			<u> </u>
City, Town or Post Office. If you have a foreign address, attach Schedule 6.		State	ZIP Code
<u>Fort Worth</u>		<u>TX</u>	<u>76111</u>
Foreign Country name	Foreign Province/State/County		Foreign Postal Code
<u> </u>	<u> </u>		<u> </u>
Filing Status Check only one box.			
<input type="checkbox"/> Single	<input checked="" type="checkbox"/> Married filing jointly	<input type="checkbox"/> Married filing separately	<input type="checkbox"/> Head of household
		<input type="checkbox"/> (MFS)	<input type="checkbox"/> (HOH)
		<input type="checkbox"/> (QW)	

Print Options and Troubleshooting

- In Global Print Settings > General Printing, there are three advanced options to assist with printing issues
- If you experience print issues that aren't resolved by changing or updating print drivers you may want to consider using the option to 'Always Print using Adobe Acrobat Reader'

Note: Because ProSeries forms are pdfs, a third party component Foxit is used to print directly to the printer. The majority of issues when printing are due to print drivers that do not work with Foxit



Print Options and Troubleshooting

- There are two options to print returns using Adobe Reader which avoids print driver issues
- The first is to select to print to File (PDF) and at the same time select 'Display PDF after save'
- This will create the pdf and open it in your default pdf viewer set in Windows
- From there you can view the return and select to print to any printer setup in Windows

The screenshot shows the 'Print Center' window with 'Print This Client' selected. Under 'Print Functions', 'From HomeBase' is expanded to show 'Print This Client', 'Print Selected Forms', 'Print EF Signature Forms', and 'Print K1 Labels'. The 'Print This Client' dialog is open, showing printer selection (HP Color LaserJet Pro M478f-9f on USB002) and options: 'Print' (selected), 'Printer', 'File (PDF)' (checked), 'DMS', 'Display PDF after save' (checked), and 'Email password protected PDF'. Below, 'Filing Copy' is checked, and 'Watermark' is set to 'DO NOT MAIL'.

The Adobe Acrobat Standard DC window shows the tax return document 'ande1111_21i_FC(1).pdf'. The 'Page Thumbnails' pane on the left shows three pages, with the second page labeled 'DO NOT FILE'. The main content area displays 'Form 8879 (Rev. January 2021) IRS e-file Signature Authorization'. The form includes the taxpayer's name 'Bruce Anderson', spouse's name 'Virginia Anderson', and social security numbers. It also shows 'Part I Tax Return Information' and 'Part II Taxpayer Declaration and Signature Authorization'. A large 'DO NOT FILE' watermark is overlaid on the form.

Part I Tax Return Information — Tax Year Ending December 31, 2021 (Enter year you are authorizing.)			
1	Adjusted gross income	1	
2	Total tax	2	0.
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099	3	
4	Amount you want refunded to you	4	
5	Amount you owe	5	0.

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

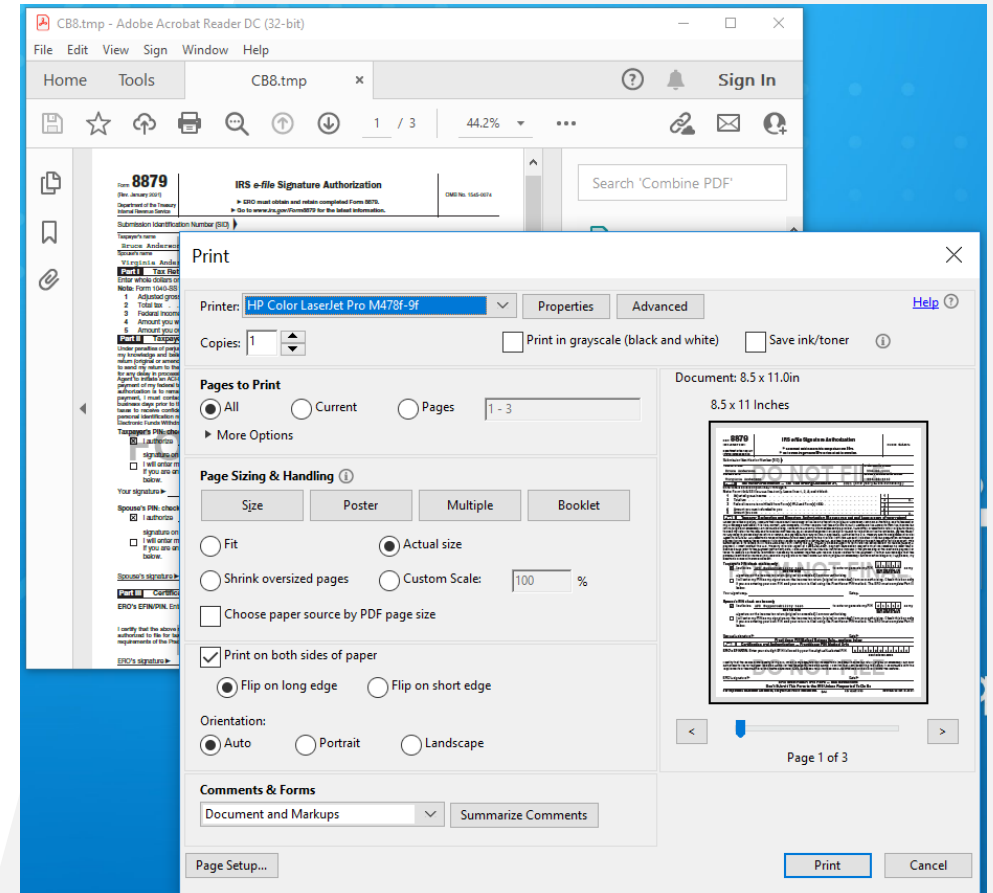
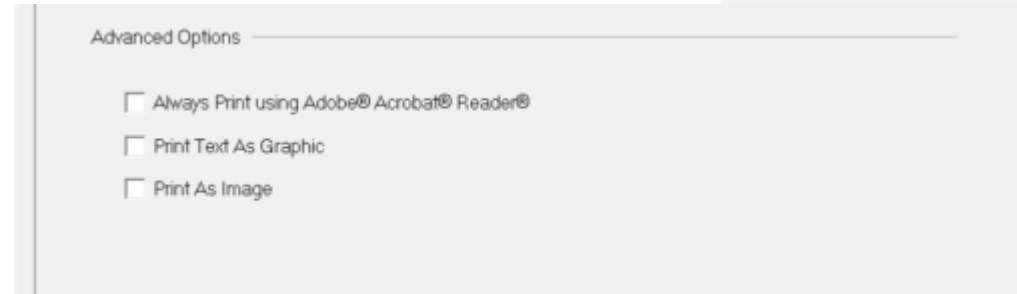
Taxpayer's PIN: check one box only

I authorize APD Supportability test to enter or generate my PIN as my signature on the income tax return (original or amended) I am now authorizing.

I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Print Options and Troubleshooting

- The second option if you know you want or need to print using Adobe Acrobat Reader all the time is 'Always Print using Adobe Acrobat Reader'
- When this option is checked ProSeries will always send print jobs to Adobe Acrobat Reader and automatically launch to the print dialog
- You can preview pages and select to print All, Current or even selected pages



Workflow Tools - Improve your efficiency

Workflow Tools - Learn More and Sign-up

ProSeries

ProSeries Practice Setup

Customize ProSeries to fit your practice

Firm & Preparer Info ERO Info **Workflow Tools** Billing Info

Workflow Tools

Increase productivity with these integrated tools that expand your ProSeries capabilities with one-place convenience.

Select the tools that you're interested in adding to ProSeries.

<input type="checkbox"/> Hosting for ProSeries Professional Gain the flexibility to work anywhere, plus get built-in layers of security, with the only cloud hosting backed by Intuit. Learn More	<input type="checkbox"/> Pay-by-Refund Let clients pay your fees out of their refund, with no upfront or out-of-pocket costs. Learn More
<input type="checkbox"/> eSignature Get any document signed securely from any online device, and track real-time status at a glance—all from one place. Learn More	<input checked="" type="checkbox"/> Protection Plus & ID Theft Restoration Add an extra layer of support for clients in case of an IRS Audit or identity theft. Learn More NEW OPTIONS

I am **not** interested in these workflow tools.

[Back](#) [Next](#)

Hosting ProSeries

- **ProSeries offers Hosting with Right Networks (per user fees apply)**
 - Free on-boarding included
- **Your same ProSeries, simply on the cloud**
- **Takes the burden of IT headaches, security concerns and data back-ups off your plate**
- **Learn more and schedule a one-on-one consultation from within ProSeries**

Additional fees apply

Search

Cloud Hosting for ProSeries

Same tax software. Different server So much better.

Offload your tax data security and IT burdens to our team of experts, and give your staff the freedom to collaborate securely from anywhere, on any device.

- **Security.** Gain layers of security measures, including data encryption, enterprise firewall, no vulnerability of physical data storage, and the list goes on.
- **IT services.** Don't worry about backups, updates, server costs, or maintenance. It's all included, plus unlimited storage for your tax data.
- **Tech support.** Our onboarding team is with you every step of the way to ensure the upgrade goes smoothly, so you can be up and running within a few days.

Hosting for ProSeries	
1-3 PEOPLE	4+ PEOPLE <small>VIEW PRICING</small>
\$120 monthly per person (setup included for free)	\$120 \$99 monthly per person (setup included for free)

No Fixed contracts EVER.

[Schedule a consultation](#)

eSignature

Here's how eSignature works



You set and send the request

Select the tax forms that require electronic signature, then attach any document you want. Set reminders, then click to send it all to your client.



Your client gets a secure email

They click to view documents on any device, authenticate as needed, and sign with quick clicks.



You see status in real-time

One dashboard inside your tax software tracks every request at-a-glance. Know right when electronic signatures are received from clients.

eSignature

- **Request and manage eSignatures directly from the HomeBase grid**
 - Use the eSignature dashboard for clients with multiple requests
- **Improved trial and first use experience for new eSignature users**
 - 5 free trials provided for customers who haven't purchased eSignature in the past
- **Use the right rail in the EF Center to view available Trial eSignature balance and to get started using your free eSignatures**

Additional fees apply for eSignature after free trial

Trial eSignature balance [Refresh](#)
4 [Buy more](#) Expires: 12/30/2021

← [How to request](#) [Track status](#) [Client POV](#)

Get started by learning how to request an eSignature

intuit Accountants Requesting Signatures in ...
Recipients Reminders

Collect eSignature Remote In-person
Email address * john.doe@gmail.com Authentication method Knowledge-Based (KBA)

Collect eSignature Remote In-person
Email address * martha.jefferson@gmail.com Email address of the person calling ethan.john@taxfirst.net

[Open in browser](#)

[Request eSignatures](#)

IRS Notices, Audit Assistance and ID Theft Protection

- Offered through Protection Plus
- Two options:
 - Cover all your clients in case of IRS audits and notices or ID theft (**firm pays** \$10 per client)
 - Provide the same protection on a per return basis to select 1040 clients (**client pays** \$44.95 fee)
- Easy enrollment in the ProSeries option setup

The screenshot shows the 'ProSeries Practice Setup' interface. The top navigation bar includes 'ProSeries Practice Setup' and 'Customize ProSeries to fit your practice'. Below this are four tabs: 'Firm & Preparer Info', 'ERO Info', 'Workflow Tools', and 'Billing Info'. The 'Workflow Tools' tab is active, displaying the 'Protection Plus & ID Theft Restoration' section. This section is powered by 'Protection Plus' and includes a description: 'Help ease your clients' worries about IRS audits and identity theft with added support that helps them navigate complex processes with ease and confidence.' There are two enrollment options: 1) 'Cover all your clients' (marked as 'NEW') for \$10 per client, where the firm pays. 2) 'Choose which clients to cover' for \$44.95 per return, where the client pays. Both options have 'Enroll now' buttons. At the bottom, there are 'Back' and 'Next' buttons. A footer note states: 'To enroll later, go to Tools > Protection Plus & ID Theft Restoration > Protection Plus Enrollment Wizard'.

Notices and audit assistance



Our bilingual (English and Spanish) team of experienced EA and CPA case resolution specialists provides personalized support if a client receives a notice from the IRS or state, or gets audited. They'll help your clients:

- Interpret letters from the IRS and the state, and help with correspondence
- Give guidance on next steps and representation as necessary
- Research the statuses of returns with the IRS
- Reconcile CP2000s and other inquiry letters
- Address issues with IRS forms including Schedules A, C, and E
- Assist with denied credits
- Resolve tax debts and rejected ITINs

Pay by Refund

- **Easy integrated enrollment**
 - Two options to enroll, through My Account or within ProSeries
 - Enrollment is pre-filled for returning customers
 - Pay-by-Refund fees and tax preparation fees are paid out of the client refund
- **Refund Advance for ProSeries**
 - gives you more options than ever before

The screenshot shows the ProSeries Practice Setup interface. The top navigation bar includes 'ProSeries Practice Setup' and 'Customize ProSeries to fit your practice'. Below this is a progress bar with four steps: 'Firm & Preparer Info', 'ERO Info', 'Workflow Tools', and 'Billing Info'. The 'Workflow Tools' step is currently active. On the left side, under 'Workflow tools', there is a sub-section for 'Pay-by-Refund/Quick Collect'. The main content area is titled 'Pay-by-Refund' and contains the following text: 'Offer your clients the convenience of refund transfers, with identity-theft protection included automatically for peace of mind.' Below this, there are two bullet points: 'Integrated. Simply choose a bank partner (either TPG-Santa Barbara Tax Products Group or Refund Advantage) during enrollment and use the integrated Pay-by-Refund feature inside ProSeries.' and 'Convenient. For clients who choose this offering, the service fee, along with your tax prep fee, are automatically drawn from their refund before disbursement. ID theft protection is included automatically.' A blue 'Enroll now' button is positioned below the text. At the bottom of the page, there are 'Back' and 'Next' buttons.

ProSeries

ProSeries Practice Setup

Customize ProSeries to fit your practice



Firm & Preparer Info ERO Info **Workflow Tools** Billing Info

Workflow tools

Pay-by-Refund/Quick Collect

Pay-by-Refund

Offer your clients the convenience of refund transfers, with identity-theft protection included automatically for peace of mind.

-  **Integrated.** Simply choose a bank partner (either TPG-Santa Barbara Tax Products Group or Refund Advantage) during enrollment and use the integrated Pay-by-Refund feature inside ProSeries.
-  **Convenient.** For clients who choose this offering, the service fee, along with your tax prep fee, are automatically drawn from their refund before disbursement. ID theft protection is included automatically.

[Enroll now](#)

Quick Collect is available as an alternative if you prefer to have the service fee drawn out of your tax prep fees. [Learn more.](#) To enroll, choose "Quick Collect" offered through TPG—Santa Barbara Tax Product Group.

Once you have enrolled with a bank, you can check your status in ProSeries, under Tools > Options > Enrollment Options.

[Back](#) [Next](#)

Intuit Link - Data Collection



	Intuit Link	Paper organizers	Portal-only services	Cloud-based storage
Client-enhanced experience	✓	Confusing language and time consuming	Document sharing only	Document sharing only
Mobile-friendly design	✓	✗	Sometimes	✓
Direct data imports from financial institutions	✓	✗	✗	✗
Real-time, two-way communication	✓	✗	✗	✗
Client progress tracking	✓	✗	✗	✗
Conversation and audit trail	✓	✗	✗	✗
Missing data reminders	✓	✗	✗	✗
Pricing	Included at no additional cost	\$22 on average in time and expenses	\$400-1,500 per year	Based on storage size needs

Intuit Link - Data Collection

Save time and stay organized with these key features



Automated reminders

Create and schedule automated reminders for individuals or all clients, depending on custom criteria.



Custom branding

Ensure that your clients feel secure and increase your brand awareness by uploading your firm's logo in Link.



Custom email templates

Create and save as many email templates as you need for your client base.



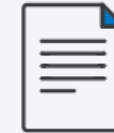
Invite clients

Ask your clients to use Link by sending them a message directly from your tax software.



Questionnaires

Send easy-to-use questionnaires to collect your clients' details and information.



Document request templates

Customize and save frequently used lists of documents that you request from clients.

Community: Listening to your Ideas

ProSeries Tax Idea Exchange.

- Share your ideas and vote on ideas shared by others as priority is given to ideas with the highest vote counts
- Get updates on status of ideas – under review, accepted or implemented
- For issues you believe might be defects please us the main community page by selecting 'Ask the community'. Our community managers and developers monitor this area for potential defects throughout the tax season.



Intuit Accountants Community > ProSeries Tax > ProSeries Tax Idea Exchange Options

ProSeries Tax Idea Exchange

Search

- 1** Idea
You have a great idea that will improve ProSeries!
- 2** Review
Check out our [getting started guide](#) before posting your idea.
- 3** Submit
[Suggest your idea](#) on how to improve ProSeries.
- 4** Vote
Vote on other ideas that you think will make ProSeries even better!

Community Ideas Status: All Sort by: Most Popular [Suggest an idea](#)

Intuit Accountants Community > ProSeries Tax

ProSeries Tax

Search

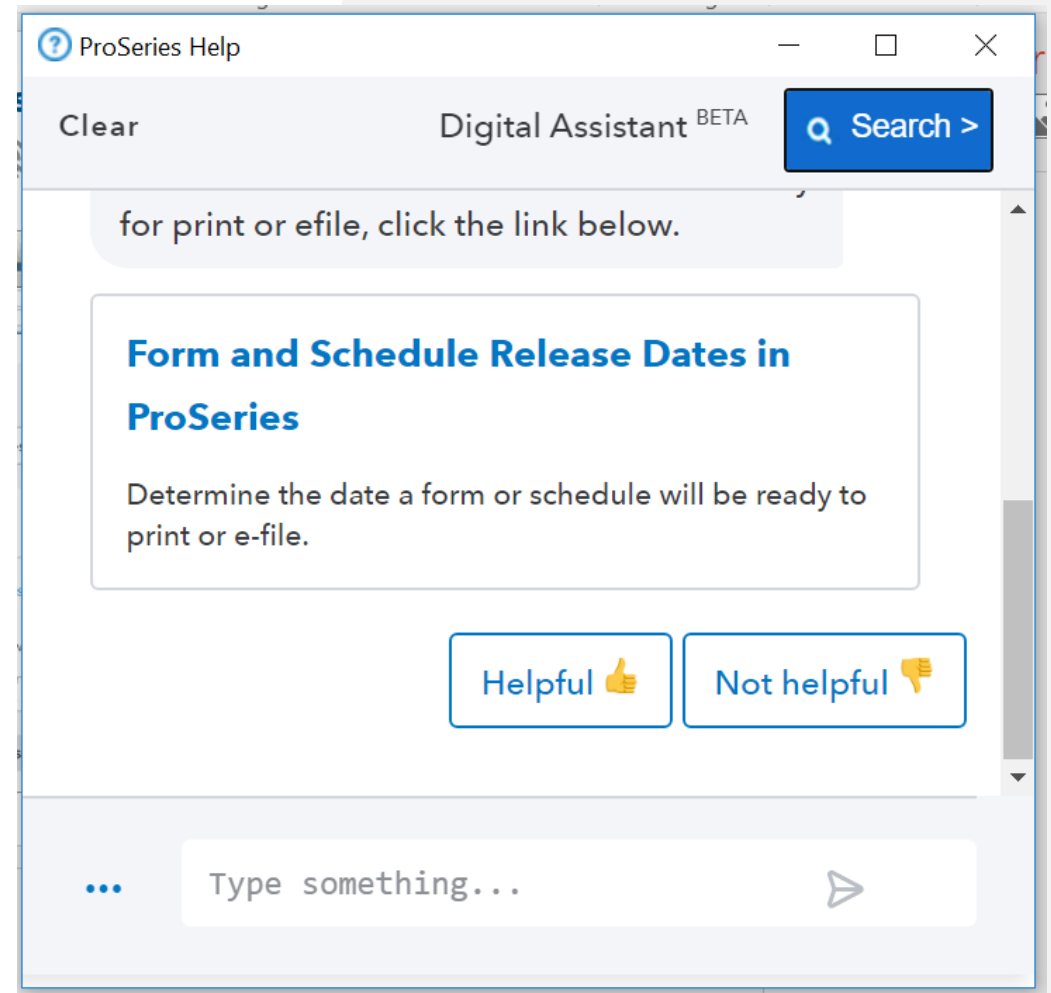
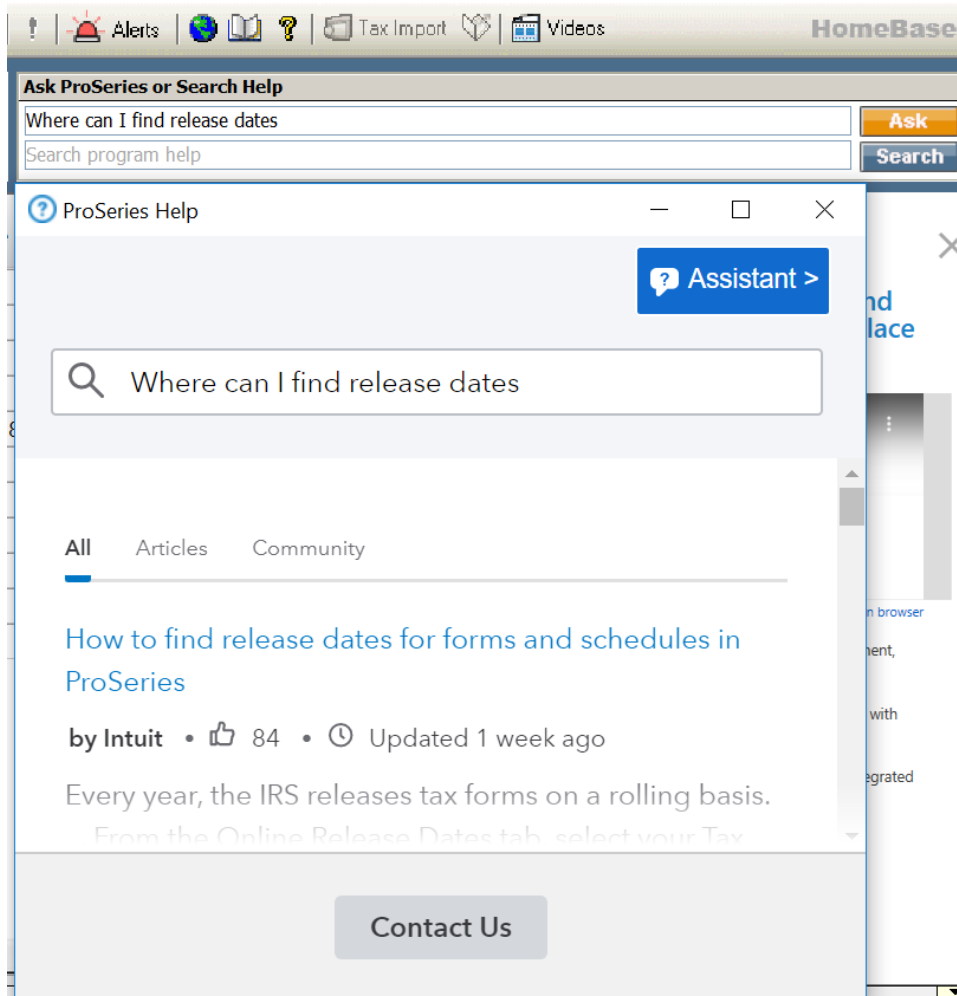
Featured

- How do I print a help article?**
Having trouble printing help articles? We are happy to announce that we hav...
- Where do I enter amounts from Form 1098 and 1099 in ProSeries?**
This table will help you find ProSeries inputs to report amounts from commo...
- Community Guidelines**
Updated 02/12/2021>Welcome to the Intuit Accountants Community! The mission ...

Recent Popular Unanswered No Replies [Ask the community](#)

Customer support: Easily Get Answers in ProSeries

- Use ProSeries Ask to easily search online help while working in ProSeries
- Select 'Assistant' to access the Digital Assistant for a guided search experience of online help



Customer support: Providing one-on-one and self serve assistance

Intelligent voice assistant

- When you call us for help, a new listening tool will be able to route your call to the right agent more quickly [Learn More](#)

Tool Hub application

- The tool hub enables you to quickly resolve common system issues and errors, so you can get back to serving your clients.
 - *To learn more and download the Tools Hub, inside ProSeries Go to Help>Support Tools> ProSeries Tools Hub*
 - *Once installed you'll have a ProSeries Tools hub icon on your desktop*



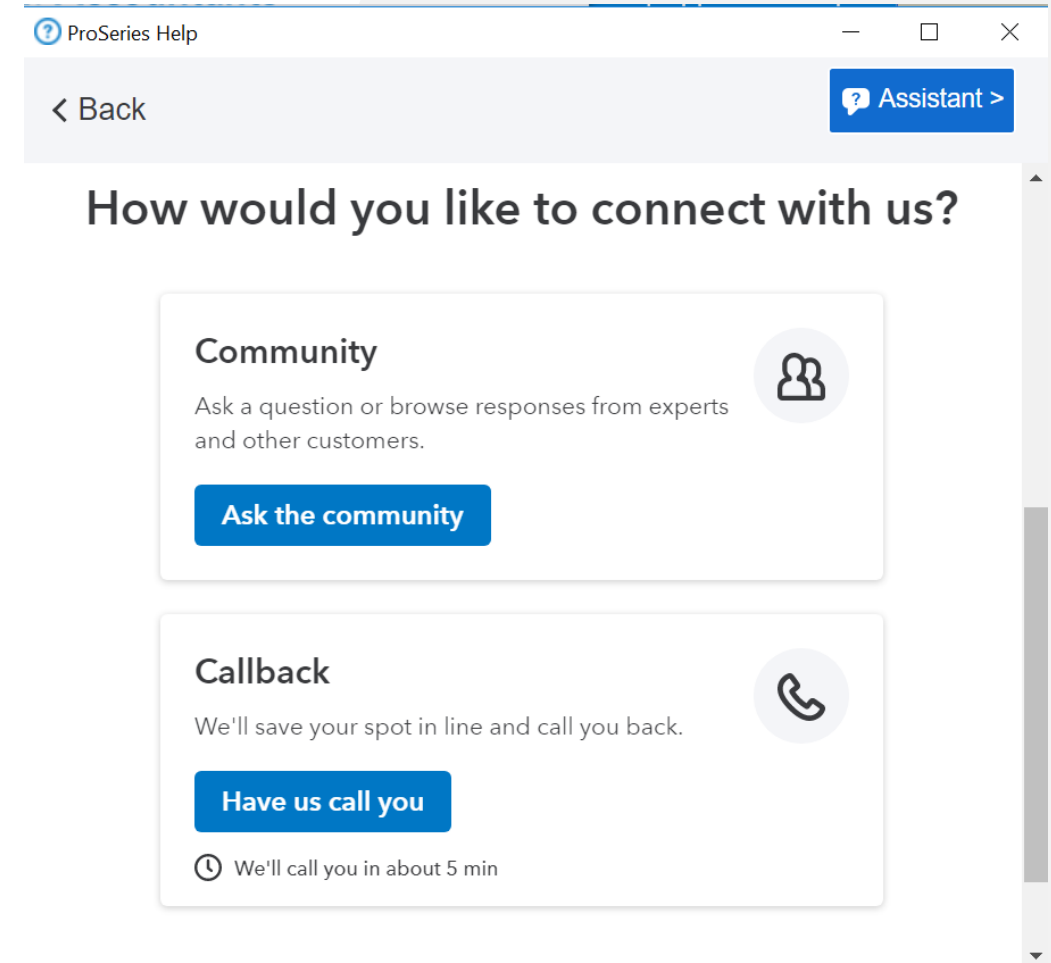
Customer support: Providing one-on-one and self serve assistance

Updated Learn & Support pages

- Enhanced Learn & Support pages make it easy to search and browse topics

Contact Us

- Save time by:
 - Scheduling an appointment or requesting a callback (accessed from the 'Contact Us' button in the ProSeries 'Ask' Help window)
 - Getting in line so you can continue working without sitting on hold ('Hold My Spot' selection when calling support)



The screenshot shows a web browser window titled "ProSeries Help". The browser's address bar contains "ProSeries Help" and standard window controls (minimize, maximize, close). Below the address bar is a navigation bar with a "< Back" button on the left and an "Assistant >" button on the right. The main content area displays the heading "How would you like to connect with us?". There are two primary options, each in a light gray box with a rounded border. The first option is "Community", accompanied by a group of people icon. The text below the icon reads "Ask a question or browse responses from experts and other customers." Below this text is a blue button labeled "Ask the community". The second option is "Callback", accompanied by a telephone handset icon. The text below the icon reads "We'll save your spot in line and call you back." Below this text is a blue button labeled "Have us call you". At the bottom of the "Callback" box, there is a clock icon followed by the text "We'll call you in about 5 min".

Training: Resources

Free, live and pre-recorded webinars

- New sessions, like tax law, ethics and tax season specific topics are continually added

Personalized Training Portal

- Software specific training and resources as well as access to onboarding success tools with 'Easy Start'

Tax and Accounting News

- Stay Current with Tax Pro Center
- See Tips For Your Practice

All these training resources and more visit [**proconnect.intuit.com/training**](https://proconnect.intuit.com/training)

ProSeries...Top Features

proconnect.intuit.com/proseries/features/

Thank you for attending!