

User of TaxCaddy

Introduction

This case study of a user of TaxCaddy is based on a May 2018 survey conducted by TechValidate, a 3rd-party research service.



“I will use TaxCaddy in the future. It was easy to use, understand, and designed well.”

Challenges

In prior tax years, this profiled user downloaded the organizer and questionnaire from their tax professional’s portal, website or file sharing service and completed all of it. Although satisfied with the process used in prior tax years, when asked to compare it to TaxCaddy she said TaxCaddy was a “significant improvement”.

Use Case

The key features and functionalities of TaxCaddy that the surveyed user uses and rated as “Excellent” in comparison to the processes used in prior tax seasons:

- Easy-to-answer questionnaire
- Easy-to-use document request list
- Electronic signing of documents
- Photographing documents with the TaxCaddy app for iPhone/Android
- Smart Links to automatically retrieve documents
- Messaging the tax professional
- Tax return delivery

Results

“By offering technology options like TaxCaddy, my tax professional demonstrates that he/she wants to improve my experience as a client.”

The surveyed user said that she would be likely to use the following potential enhancements:

- Ability to pay her tax professional’s fees
- Ability to track estimated tax payments
- Reduced email notifications
- Ability for her spouse to e-sign documents via email
- Ability to log in with Google, Microsoft or other accounts

The surveyed user rated TaxCaddy Support as not necessary, because TaxCaddy was already so easy to use.

About TaxCaddy

SurePrep was founded in 2002 and is the leader in 1040 automation for CPA firms. SurePrep’s solutions are used by more than 19,000 tax professionals ranging from Big 4 firms to sole practitioners. SurePrep provides the most automated solutions available to streamline the entire 1040 process for both the CPA and taxpayer.

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