

Evaluating tax prep automation: What matters beyond features

A feature list shows what a tool is designed to do. It cannot tell you whether the tool fits the way your firm already works, whether your reviewers can check what it produces, or where your clients' documents go along the way.

Before choosing a tool, **ask every vendor three questions:**

1 Will it fit how your firm already works?

Evaluate whether it works with the folders, permissions and habits your firm already has, and whether a new staff member could pick it up without training.

- ☐ Does it work in the client folders you already keep, including ones synced from Canopy or Google Drive?
- ☐ Can documents keep arriving the way they do now, with no new upload step?
- ☐ Do its results land in your own folders, under the permissions you already set?
- ☐ Are your files moved or renamed only when you say so?



How Taxably answers

- ✓ Taxably reads the client folders your firm already keeps, including the folder your practice portal or storage app keeps on the computer, with no upload step.
- ✓ Each prep sheet is saved in its client's own folder under your firm's permissions, and your documents stay where they are, renamed only if you turn on Rename my files.
- ✓ Its sections follow the order of the return, so a reviewer reads the prep sheet the way they read a 1040.

2 Can you check everything it produces?

You sign the return, so every figure a tool hands you has to be one a reviewer can verify, and every gap has to be visible.

- ☐ Can every figure be traced to the page it came from?
- ☐ When a document's role is unclear, does it ask you rather than guess?
- ☐ Does a total that may be incomplete say so?
- ☐ Does it list only what arrived, never a form an organizer merely mentions?



How Taxably answers

- ✓ Every original page sits behind its section in the prep sheet, labelled with the document it belongs to, so a reviewer can check a figure against its page.
- ✓ When the documents cannot settle where something belongs, Taxably asks a specific question naming the file rather than guessing.
- ✓ A figure whose role is unclear is reported rather than summed, a total that may understate says so, and a form the client only mentioned is not reported as having arrived.

3 Where do client documents go, and who answers for them?

Your duty to your clients follows their documents, so find out who handles the pages, on what terms, and what the vendor commits to in writing.

- ☐ Who receives your clients' pages to read them, and under what terms?
- ☐ Do the vendor's own servers ever hold a copy of a document?
- ☐ Does it put in writing what IRC § 7216 and your written security plan need from a vendor?
- ☐ What happens to your records and its output when you stop using it?



How Taxably answers

- ✓ Each document's pages go from your computer straight to the reading provider named on our [subprocessor list](#), only to its United States locations, and our servers never receive them.
- ✓ That provider is not permitted to train on them, and under its standard terms it can keep content it flags for abuse monitoring for up to 90 days, unless an applicable agreement applies.
- ✓ Our [Data Processing Addendum](#) accepts that Taxably is a tax return preparer under IRC § 7216. If you stop, your documents and prep sheets stay in your client folders, and Taxably's records stay on your computer.

Ask Taxably the same questions

A good evaluation looks at the whole job, not the feature list. Connect a folder of your own and see the prep sheet Taxably builds from it, or read how we handle your clients' documents in the [Trust Center](#).

See it on your own folders

Read the Trust Center