

General Questions

1. What is ProSeries Tax Import?

ProSeries Tax Import will allow you to import tax data into ProSeries directly from scanned source documents and financial institutions.^[1] ProSeries Tax Import is available as an add-on service to ProSeries.

2. When will ProSeries Tax Import be available?

ProSeries Tax import is available now as an add-on service in your ProSeries tax software.

3. How much does ProSeries Tax Import cost?

We offer four different ways for you to license ProSeries Tax Import, tailored to your firm's unique needs:

- Pay-Per-Imported 1040 Return: **\$8.99**
- 50 Imported 1040 Returns: **\$299^[2]**
- 100 Imported 1040 Returns: **\$499^[2]**
- Unlimited Imported 1040 Returns: **\$999^[2]**

4. What are the benefits of Tax ProSeries Import?

ProSeries Tax Import can save you time by enabling your tax software to import more data, so that you have to input less.

5. How does ProSeries Tax Import work?

ProSeries Tax Import uses two unique technologies to import data into a return: from clients' scanned source documents and from financial institution downloads.

Working with Financial Institution Downloads

6. How do I download financial institution data with ProSeries Tax Import?

ProSeries Tax Import downloads tax data directly from several of the top financial institutions. Through a secure website, TaxFormDropoff.intuit.com, your client approves the direct, automatic download of their financial institution forms into their return. You will then have the ability to download the data into ProSeries. Note: You must have Excel version 11 (Office 2003) or greater in order to review and edit 1099-B data before importing.

7. What financial institution forms are available to download into ProSeries?

A list of the scanned source documents available for download is available on our website, and it includes 1099-DIV, 1099-INT, 1099-B and W-2 forms.

8. Which financial institutions currently support ProSeries Tax Import data downloads?

Bank of America, Charles Schwab, E*TRADE, Edward Jones, Fidelity, Morgan Stanley, Morgan Stanley Smith Barney, Scottrade, TD AMERITRADE, UBS and Wells Fargo Advisors (including Wachovia) are all supported.

W-2 downloads from ADP are also supported.

9. What will my clients have to do to allow me to access their financial institution download data?

Your clients will go to an Intuit website, TaxFormDropoff.intuit.com and sign in with the last four digits of their social security number and their five-digit ZIP code. Then, they will be able to enter their login information and submit their request.

10. How long does it take for me to get the financial institution data after a client transmits them?

It can usually take anywhere from a few seconds up to two hours until you can access the data in ProSeries. If you need immediate access, you can use the "Access Financial Download Data" option from the ProSeries Tax Import menu. If a client logs into our website, TaxFormDropoff.intuit.com, you will be able to remotely access their financial institution data as soon as your client finishes.

11. What if I make a manual edit to a 1099 form I downloaded from a financial institution into my tax program?

Manual edits are never overwritten. In ProSeries, they are shown in black. They are retained even if a corrected form is subsequently imported.

Important disclaimers, disclosures and notes

1. Reference the rest of these FAQs for the complete list of tax documents and participating financial institutions that can be imported.

2. These Tax Year 2011 bundles on ProSeries will expire on October 31, 2012. The 50/100 Imported 1040 Returns and Unlimited Imported 1040 Returns bundles will be for use in our Tax Year 2011 products, and will expire on October 31, 2012. Terms, conditions, pricing, features, service, support and bundles are subject to change at any time without notice.