

INTUIT[®] Accountants

Intuit Practice Management

Now, there's a better way to work.

Every hour you spend on internal communications is an hour away from developing your business or getting actual tax prep done. Get time back for what matters to you by bringing all of your conversations and work together in one secure, online, collaborative platform with Intuit Practice Management powered by Karbon. It deeply integrates with your work email provider and Intuit Lacerte Tax, and Intuit ProConnect Tax, so you can run your tax firm efficiently from one place.

Contact your sales representative to learn more.

Work

Keep up with your work as it progresses and quickly adjust assignments to optimize staff capacity.

Customize your views by:

- Clients and services
- Staff member
- Deadlines and statuses

The screenshot displays the Intuit Practice Management software interface. The top navigation bar includes the Intuit logo and 'Practice Management' on the left, and 'Triage' on the right. A sidebar on the left contains navigation options: Triage, To-Do, Work, Contacts, Insights, ProConnect, and a 'RECENTLY VIEWED' section with items like 'Individual Tax 1040' and 'Internal Process Review'. The main area is titled 'Capacity Dashboard' and shows a grid of work items assigned to staff members: Andi Anchetta, Danielle Ratje, Lachlan Macindoe, and Pax Zwanikken. Each item card displays the task name, status (e.g., 'In Progress', 'Ready for Review'), due date, estimated time, and budget. A modal window is open over the 'Individual Tax 1040' item, showing details for Harriet London. The bottom of the interface features the Karbon logo and the text 'Powered by Karbon'.

intuit
Practice Management

Triage

Capacity Dashboard Team: Accounting Team Due: This Week [Add Filters](#)

Add Work 31 Work Items 20,150.00 Budget USD 139h 30m Estimated Time

Andi Anchetta 5

- Monthly Accounts** 2m
Pacific Coast Logistics
In Progress
Due: Today
Estimated Time: 2h 30m
Budget: 650.00 USD

Danielle Ratje 2

- Service Proposal** 8h
Farmer Fresh Markets
In Progress
Due: Tomorrow
Estimated Time: 2h
Budget: 300.00 USD
- Internal Process Review** 1d
Management Team
Ready for Review
Due: Wednesday
Estimated Time: 4h
Budget: 0.00 USD

Lachlan Macindoe 4

- Financial Statements** 2m
Roger Horder
In Progress
Due: Wednesday
Estimated Time: 6h 30m
Budget: 1,250.00 USD
- Monthly Accounts** 30m
Richard Short
Approved
Due: Thursday
Estimated Time: 2h 30m
Budget: 650.00 USD
- Monthly Accounts** 1h
Moana Taranaki
Ready for Review
Due: Thursday
Estimated Time: 2h 30m
Budget: 650.00 USD
- Individual Tax 1040** 1h
Andy Biggs
Preparing
Due: Friday
Estimated Time: 3h 30m
Budget: 700.00 USD

Pax Zwanikken 3

- Cash Flow Assessment**
Tamara Hulu
Review
Due: Tomorrow
Estimated Time: 1h 30m
Budget: 350.00 USD
- Discovery Meeting**
Dave Circuit
Review
Due: Wednesday
Estimated Time: 2h
Budget: 300.00 USD
- Service Proposal**
Karina Howard
Review
Due: Friday
Estimated Time: 2h
Budget: 300.00 USD

Individual Tax 1040 30m
Harriet London
Waiting on Client
Due: Tomorrow
Estimated Time: 3h 30m
Budget: 700.00 USD

Pepe Zulu
Ready to Start
Due: Friday
Estimated Time: 2h 30m
Budget: 650.00 USD

Discovery Meeting 2d
Lola Goepel
Planned
Due: Friday
Estimated Time: 2h
Budget: 300.00 USD

OKRs Q2 1d
Management Team
Planned
Due: Friday
Estimated Time: 5h
Budget: 0.00 USD

Bronwyn Fredrickson

Help & Feedback

Settings

Logout

Powered by Karbon





Collaborate

Communicate with staff and clients in real-time without losing sight of the work.

- Integrates with Gmail, Microsoft Exchange and Microsoft Office 365
- Staff conversations with @mentions
- Private, internal discussions tied to the original client email
- Complete audit history of communications with or about a client


Triage

April


-  Dean Aramburu | Training for Clayton Crouch Work assignment
[Assigned to You](#) [Training for Clayton Crouch](#) [Clayton Crouch](#)
-  Dean Aramburu | Tax: Partnership tax return (Form 1065) - 2019 Work assignment
[Assigned to You](#) [Tax: Partnership tax return \(Form 1065\) - 2019](#) [Garr Management](#)
-  Jeremy Herbel | Tax: Partnership tax return (Form 1065) - 2019 Work assignment
[Assigned to You](#) [Tax: Partnership tax return \(Form 1065\) - 2019](#) [Garr Building](#)
-  Jeremy Herbel | Need help with taxes Work assignment
[Assigned to You](#) [Need help with taxes](#) [Todd Bush](#)

I need to update my return



 [I need to update my return](#)  [Jayanth Saimani](#)

 Bianca Lee Apr 17, 2:31pm
Can you please update my return as I did consulting work this year? I would also like to add my wife as I'm filing jointly this year. Thanks!

2

 Bianca Lee @clayton_crouch This is done. Apr 17, 2:40pm



-  Clayton Crouch | Ind Return Note
[Assigned to You](#) [Tax: Individual tax return \(Form 1040\) - 2019](#) [Jayanth Saimani](#)
-  Jeremy Herbel | Training for Bianca Lee Work assignment
[Assigned to You](#) [Training for Bianca Lee](#) [Bianca Lee](#)

Automate

Standardize processes and consistently deliver exceptional client experiences.

- Proven work templates for every service in your profession
- Tax templates exclusively made for Lacerte and ProConnect
- Schedule recurring tasks for staff and clients
- Automatic client reminders and notifications

The screenshot displays the Intuit Practice Management interface for a specific client, 'Individual Tax Return 1040'. The interface is organized into several sections, each representing a stage of the tax preparation process. Each section includes a title, a sub-header, a list of tasks with checkboxes, due dates, and status indicators (like 'A' for assigned or 'P' for pending). A 'PROCONNECT TEMPLATE' button is visible at the top of the task list.

Individual Tax Return 1040

Edited Yesterday
Used to Create Work 1,240 Times
Last Used 7 Min Ago

PROCONNECT TEMPLATE

Tasks | Details

Collapse All Sections

Pre-Work

2 Automators

- Prepare and Send Engagement Letter (Due on Start Date, Status: C)
- Create 1040 Tax Return in ProConnect (PROCONNECT) (Due 3 Days After, Status: A)
- Sent Tax Organizer to Client (Due 3 Days After, Status: A)

Preparation

4 Automators

- Review Tax Organizer and Prior Year Return (Due 14 Days After, Status: P)
- Prepare Initial Draft Return (Due 14 Days After, Status: P)
- Run Tax Diagnostics (Due 14 Days After, Status: P)
- Complete Self Review of Tax Return (Due 14 Days After, Status: P)

Review and Advise

4 Automators

- Complete Manager Review of Tax Return (Due 16 Days After, Status: A)
- Complete Tax Review Call or Meeting (Due 16 Days After, Status: A)

Assemble

4 Automators

- Assemble and Send Tax Package to Client for E-Signature (Due 18 Days After, Status: A)
- Send Invoice to Client (Due 18 Days After, Status: P)

Client Signature

3 Automators

- Confirm Receipt of Signed Forms (Due 21 Days After, Status: A)

intuit Practice Management

Triage
To-Do
Work
Contacts
Insights
ProConnect

RECENTLY VIEWED

- Individual Tax 1040 (Tanya Franks)
- Internal Process Review (Management Team)
- Monthly Accounts (Xi Health Industries)

Bronwyn Fredrickson

Help & Feedback
Settings
Logout