

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

Practice Management

Triage

- 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

Powered by Karbon

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

Service Proposal 8h

Farmer Fresh Markets

In Progress

Due: Tomorrow

Estimated Time: 2h

Budget: 300.00 USD

Financial Statements 2m

Roger Forder

In Progress

Due: Wednesday

Estimated Time: 6h 30m

Budget: 1,250.00 USD

Cash Flow Assessment 3

Tamara Hulu

Review

Due: Tomorrow

Estimated Time: 1h 30m

Budget: 350.00 USD

Discovery Meeting 1d

Dave Circuit

Review

Due: Wednesday

Estimated Time: 2h

Budget: 300.00 USD

Service Proposal 1h

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

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

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





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

 [Reply To All](#) [↩](#) [→](#) [Comment](#)

-  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

intuit

Practice Management

Triage

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RECENTLY VIEWED

Individual Tax 1040
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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

Add Task

...

2 Automators

Prepare and Send Engagement Letter

Due on Start Date

C

Create 1040 Tax Return in ProConnect

PROCONNECT

Due 3 Days After

A

Sent Tax Organizer to Client

Due 3 Days After

A

Preparation

Add Task

...

4 Automators

Review Tax Organizer and Prior Year Return

Due 14 Days After

P

Prepare Initial Draft Return

Due 14 Days After

P

Run Tax Diagnostics

Due 14 Days After

P

Complete Self Review of Tax Return

Due 14 Days After

P

Review and Advise

Add Task

...

4 Automators

Complete Manager Review of Tax Return

Due 16 Days After

A

Complete Tax Review Call or Meeting

Due 16 Days After

A

Assemble

Add Task

...

4 Automators

Assemble and Send Tax Package to Client for E-Signature

Due 18 Days After

A

Send Invoice to Client

Due 18 Days After

P

Client Signature

Add Task

...

3 Automators

Confirm Receipt of Signed Forms

Due 21 Days After

A