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It's all right here.

The Connected Tax Workflow

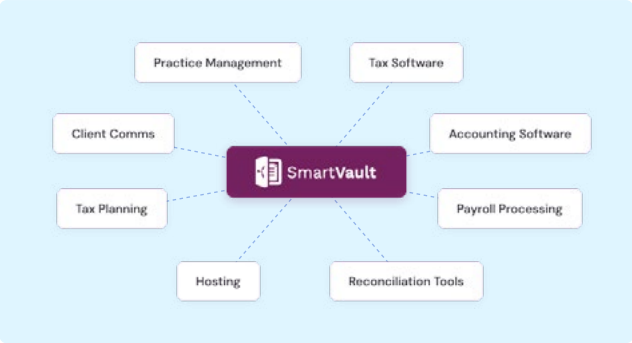
Turn 5 scattered processes into one system that saves time and reduces burnout

The workflow didn't get harder. **The system got fragmented.**

App Sprawl

Too many disconnected tools create duplicate work and version confusion.

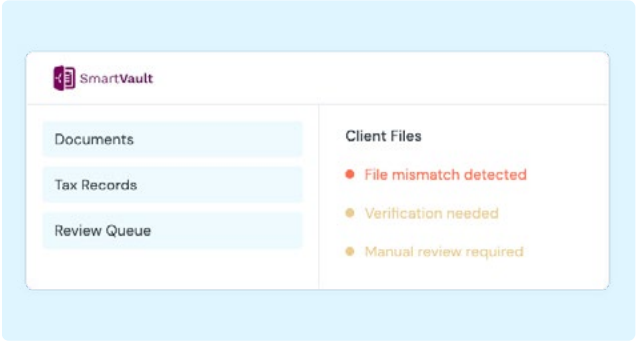
Impact: More handoffs and rework.



AI Without Structure

Layering automation onto fragmented systems creates misalignment and review pressure.

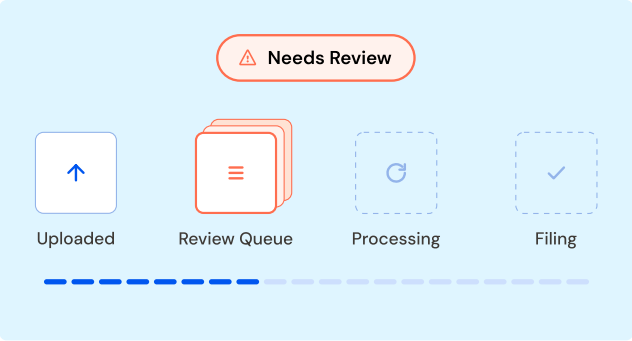
Impact: More confusion, not clarity.



Review Bottlenecks

When context resets at every stage, prep and review cycles slow down.

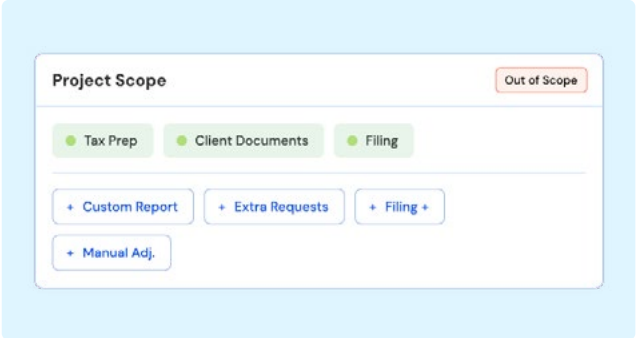
Impact: Slower turnaround.



Scope Creep

Late requests and disconnected communication push work out of scope and create pricing friction.

Impact: Reduced margins & revenue.



The Connected System

Every tax return moves through 5 predictable stages: **1. Engage | 2. Collect | 3. Prep & Review | 4. Deliver | 5. Archive**

Instead of managing each step separately with different tools, logins, and handoffs, a connected workflow brings everything together. When your tools and processes work together, work moves more smoothly, your team spends less time managing technology, and your firm has more freedom to focus on what matters most.

1 Engage

Automate client onboarding & engagement

Turn prospects into clients faster with streamlined pricing, engagement letters, and eSignatures.

- Client outreach
- Engagement letter signing
- Proposal & pricing estimates
- Client intake & information capture
- Bulk engagement letters & client record creation
- Secure portal for document submissions

2 Collect

Simplify document requests, tracking, & sharing

Eliminate document chaos with a secure portal, automated requests, and structured intake.

- Client uploads & document tracking
- Bulk AI-generated document requests
- Auto-compiled workpapers
- Reduced manual follow-ups for missing files
- Structured digital intake forms
- Mobile document scanning that upload as PDFs

3 Prep & Review

Automate workpaper organization & tax prep

Centralize, organize, and integrate with tax software for a seamless preparation process.

- Sync documents directly with your tax prep app
- Secure document storage with version control
- Automated workpaper filing & review workflows
- Team collaboration with role-based access
- Convert scanned tax documents into digital files

4 Deliver

Secure tax return delivery & payments

Deliver returns securely with automated eSignatures, client access, and built-in controls.

- Form 8879 & signing with KBA identity verification
- Secure client access to completed returns
- Digital tax return delivery, eliminating email risks
- Organized return distribution
- Docs are restricted until payment is received

5 Archive

Keep all docs with unlimited, accessible storage

Secure long-term storage with built-in compliance, version control, and audit tracking.

- Retain tax documents securely
- SOC 2 Type 2 compliant for rigorous protection
- IRS 4557 & FTC Safeguards Rule compliance
- Advanced search & retrieval
- Audit logs & role-based access permissions

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It's all right here.

Where Rightworks + SmartVault fits in your tax prep workflow

Take the friction out of tax prep for you and your clients. SmartVault brings your documents, signatures, and communications flow into one secure system of record so your existing tools work better together, all secured in the Rightworks cloud.



Direct integrations with the tools **you already use**

Leading Tax Software

Returns and source documents flow directly into structured folders by client and tax year.

intuit Lacerte® Tax

intuit ProConnect® Tax

intuit ProSeries® Tax

Thomson Reuters

DrakeSoftware

Hosting & Infrastructure

Secure, cloud-hosted environments remain fully supported.

rightworks

Enterprise Tax Platforms

Enterprise-level document control aligned with compliance requirements.

Wolters Kluwer

Connect your tax workflow with Rightworks + SmartVault.

Bring documents, applications, and critical tax processes together in one secure environment, with integrations that work with the tools your firm already uses. See how a more connected workflow can reduce manual handoffs, simplify tax prep, and give your team more time to focus on higher-value work.

GET A DEMO

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