

(19) World Intellectual Property Organization
International Bureau



(43) International Publication Date
13 July 2006 (13.07.2006)

PCT

(10) International Publication Number
WO 2006/073833 A3

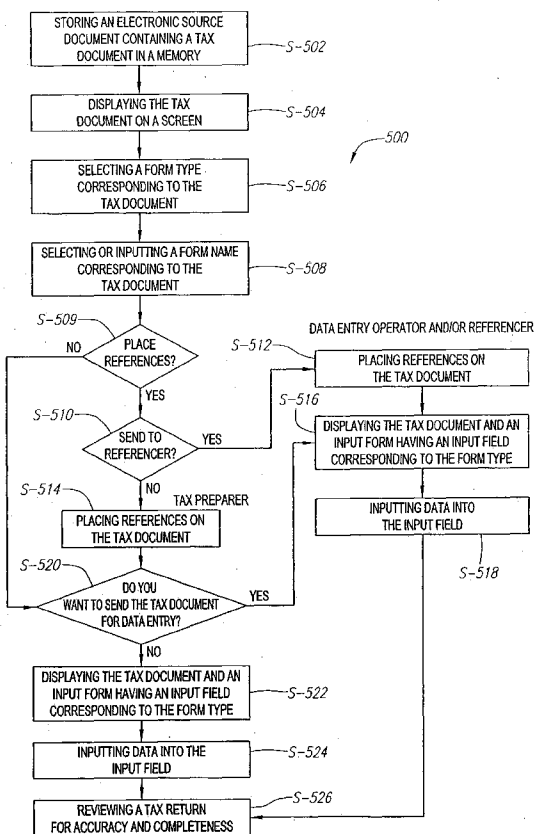
- (51) International Patent Classification:
G06F 17/22 (2006.01) G07F 19/00 (2006.01)
- (21) International Application Number:
PCT/US2005/046397
- (22) International Filing Date:
20 December 2005 (20.12.2005)
- (25) Filing Language: English
- (26) Publication Language: English
- (30) Priority Data:
11/031,060 7 January 2005 (07.01.2005) US
- (71) Applicant (for all designated States except US):
SUREPREP, LLC [US/US]; Suite 330, 450 Newport Center Drive, Newport Beach, CA 92660 (US).
- (72) Inventor; and
- (75) Inventor/Applicant (for US only): WYLE, David, A. [US/US]; 4827 Dorchester Road, Corona Del Mar, CA 92625 (US).
- (74) Agent: VAKIL, Ketan, S.; Snell & Wilmer LLP, 600 Anton Boulevard, Suite 1400, Costa Mesa, CA 92626 (US).

- (81) Designated States (unless otherwise indicated, for every kind of national protection available): AE, AG, AL, AM, AT, AU, AZ, BA, BB, BG, BR, BW, BY, BZ, CA, CH, CN, CO, CR, CU, CZ, DE, DK, DM, DZ, EC, EE, EG, ES, FI, GB, GD, GE, GH, GM, HR, HU, ID, IL, IN, IS, JP, KE, KG, KM, KN, KP, KR, KZ, LC, LK, LR, LS, LT, LU, LV, LY, MA, MD, MG, MK, MN, MW, MX, MZ, NA, NG, NI, NO, NZ, OM, PG, PH, PL, PT, RO, RU, SC, SD, SE, SG, SK, SL, SM, SY, TJ, TM, TN, TR, TT, TZ, UA, UG, US, UZ, VC, VN, YU, ZA, ZM, ZW.
- (84) Designated States (unless otherwise indicated, for every kind of regional protection available): ARIPO (BW, GH, GM, KE, LS, MW, MZ, NA, SD, SL, SZ, TZ, UG, ZM, ZW), Eurasian (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM), European (AT, BE, BG, CH, CY, CZ, DE, DK, EE, ES, FI, FR, GB, GR, HU, IE, IS, IT, LT, LU, LV, MC, NL, PL, PT, RO, SE, SI, SK, TR), OAPI (BF, BJ, CF, CG, CI, CM, GA, GN, GQ, GW, ML, MR, NE, SN, TD, TG).

Declaration under Rule 4.17:
— as to applicant's entitlement to apply for and be granted a patent (Rule 4.17(ii))

[Continued on next page]

(54) Title: EFFICIENT WORK FLOW SYSTEM AND METHOD FOR PREPARING TAX RETURNS



(57) Abstract: A processor-based method for preparing a tax return using multiple service providers. The method includes receiving at a first service provider an image file that includes a plurality of data values and assigning at the first service provider the image file to a form having a plurality of predefined field names, wherein each of the plurality of data values belong to one of the plurality of predefined field names. The method also includes receiving at a second service provider the image file and an input form having a plurality of input fields corresponding to the plurality of predefined field names and associating at the second service provider the plurality of data values from the image file with the plurality of input fields.

WO 2006/073833 A3



Published:

- with international search report
- before the expiration of the time limit for amending the claims and to be republished in the event of receipt of amendments

For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.

(88) Date of publication of the international search report:

20 September 2007

INTERNATIONAL SEARCH REPORT

International application No.

PCT/US 05/46397

A. CLASSIFICATION OF SUBJECT MATTER IPC(8) - G06F 17/22; G06F 19/00 (2007.01) USPC - 705/31 According to International Patent Classification (IPC) or to both national classification and IPC		
B. FIELDS SEARCHED Minimum documentation searched (classification system followed by classification symbols) USPC - 705/31 Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched None Electronic data base consulted during the international search (name of data base and, where practicable, search terms used) PubWEST (USPT, PGPB, EPAB, JPAB); DialogPRO (Engineering); Google Scholar Search Terms: tax, form, extract, data, field, merge, scan, pdf, W-2 or W2, preparer		
C. DOCUMENTS CONSIDERED TO BE RELEVANT		
Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X ---	US 2003/0233296 A1 (WAGNER) 18 December 2003 (18.12.2003); entire document, especially Fig. 1a, 1b, 10; para [0031], [0034], [0038], [0052], [0065], [0072], [0077], [0084]	1-3, 6-8, 11, 16-20 ----- 4-5, 9-10, 12-15
Y	US 2002/0111888 A1 (STANLEY et al.) 15 August 2002 (15.08.2002); entire document, especially para [0005], [0011], [0012], [0015], [0028], [0056], [0059], [0070]	4-5, 9-10, 12-15
<input type="checkbox"/> Further documents are listed in the continuation of Box C. <input type="checkbox"/>		
<p>* Special categories of cited documents:</p> <p>"A" document defining the general state of the art which is not considered to be of particular relevance</p> <p>"E" earlier application or patent but published on or after the international filing date</p> <p>"L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)</p> <p>"O" document referring to an oral disclosure, use, exhibition or other means</p> <p>"P" document published prior to the international filing date but later than the priority date claimed</p> <p>"T" later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention</p> <p>"X" document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone</p> <p>"Y" document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art</p> <p>"&" document member of the same patent family</p>		
Date of the actual completion of the international search 24 May 2007 (24.05.2007)	Date of mailing of the international search report 23 JUL 2007	
Name and mailing address of the ISA/US Mail Stop PCT, Attn: ISA/US, Commissioner for Patents P.O. Box 1450, Alexandria, Virginia 22313-1450 Facsimile No. 571-273-3201	Authorized officer: Lee W. Young PCT Helpdesk: 571-272-4300 PCT OSP: 571-272-7774	