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CASE STUDY

AmeriTax

Automates Tax Return Preparation with an AI ProSeries Agent Built on AWS and Shri Sai Tech LLC DBA SST

Executive summary

AmeriTax, a US CPA firm filing through Intuit ProSeries, set out to remove the slowest part of every return: collecting a client's W-2s, 1099s and other statements, then retyping each box into the preparer's software by hand. The firm wanted AI to read the documents, ask the client what no document can answer, and enter the return itself.

Traditional preparation is manual end to end: documents arrive piecemeal by email, every box is keyed twice, due-diligence questions are answered from memory, and nothing records what was typed or why. A single return can take hours of data entry, and a transposed digit is found only at review — if at all.

To change this, AmeriTax partnered with Shri Sai Tech (SST) to design, build and deploy the AmeriTax Client Portal and ProSeries Robot on Amazon Web Services (AWS). Using language and vision models behind a provider-agnostic layer, Amazon RDS for PostgreSQL, Amazon S3 and Amazon EC2, SST delivered an agent that reads each document, checks it against the client, and types every box into ProSeries with a screenshot as evidence.

The challenges

Challenge 1 – Manual Data Entry into ProSeries

Every W-2, 1099 and 1098 was keyed box by box into ProSeries by a preparer, hours per return spent on transcription instead of tax work.

Challenge 2 – Chasing Documents

Clients sent statements piecemeal; nobody knew which forms a return still needed, and a missing 1099 surfaced only once preparation had begun.

Challenge 3 – Reading Errors with No Audit Trail

A misread amount or a document belonging to the wrong person was invisible once typed; nothing recorded which document produced which box.

Challenge 4 – Questions No Document Answers

Form 8867 due diligence, Schedule B foreign accounts, identity verification and e-file authentication were answered from memory, with no stated reason behind each tick.

Challenge 5 – Protecting Client Data

Social Security numbers, identity documents and bank details demanded per-client isolation and verified sign-in.

About AmeriTax

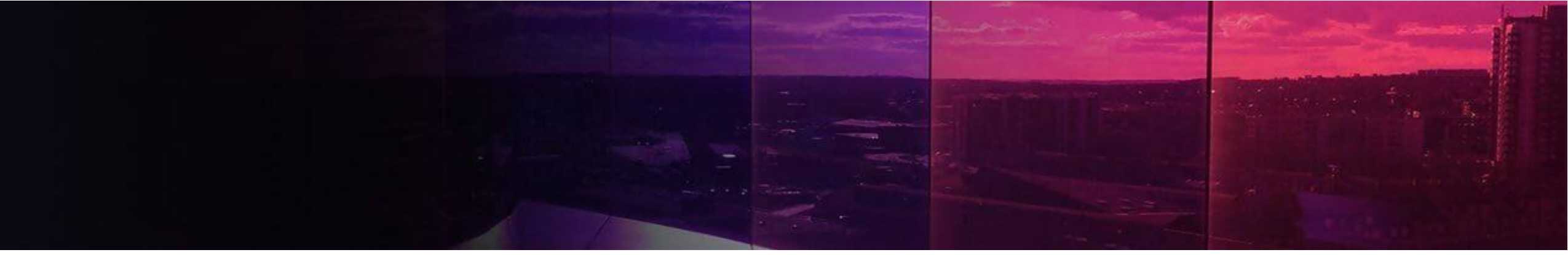
AmeriTax is a US tax and payroll services firm preparing individual returns for working families, retirees and small-business owners — every return filed through Intuit ProSeries.

AmeriTax's goal is a return that prepares itself: the client uploads their documents and answers a few questions, and the forms arrive in ProSeries typed, checked and ready for the CPA's review.

Chetan Narendra Lalwani
Founder / CPA

A practice that spends its hours on advice and review, not on retyping boxes — every number traceable to its document.

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Simplify Digital Transformation with AWS

Amazon Web Services (AWS) provided AmeriTax with a secure, scalable and cost-effective cloud platform to run the portal, document reader and ProSeries robot together.

By using managed AWS services, AmeriTax avoided building and maintaining its own infrastructure: a managed relational database for client records, object storage for documents and robot releases, and Windows and Linux compute for ProSeries and the API.

Why Shri Sai Tech?

AmeriTax selected Shri Sai Tech for its deep expertise in AI document understanding, cloud-native architecture on AWS, desktop automation design and rapid delivery of production-ready solutions:

Key reasons AmeriTax selected SST:

- AI document reading and vision-model implementation
- AWS cloud architecture and secure data handling experience
- Screen-reading automation of desktop software (ProSeries)
- Relational, audit-ready data modelling on PostgreSQL
- Secure, per-client application development
- Agile delivery methodology
- Ability to rapidly deliver a production-ready proof of concept

The Solution

SST designed and implemented the AmeriTax platform — a client portal, an AI document reader and a ProSeries robot, built on AWS with language and vision models and PostgreSQL — that turns a folder of tax documents into a typed, checked and evidenced return.

Client Portal

Builds each client's checklist from last year's Form 1040 and their answers — the W-2s, 1099s, 1098s, 1095-A and identity documents the return needs — with verified sign-in, uploads and the questions no document can answer.

AI Document Reader

Reads W-2, 1099-INT/DIV/B/R/NEC, SSA-1099, 1098, 1098-T, 1095-A and K-1 forms box by box, checks each against the client's identity and tax year, and flags a wrong person or year before a CPA sees it.

CPA Review Workspace

Every box beside its source crop with a confidence, a prior-year comparison and the rules ProSeries enforces; approve, correct or send back, then one click releases the batch to the robot.

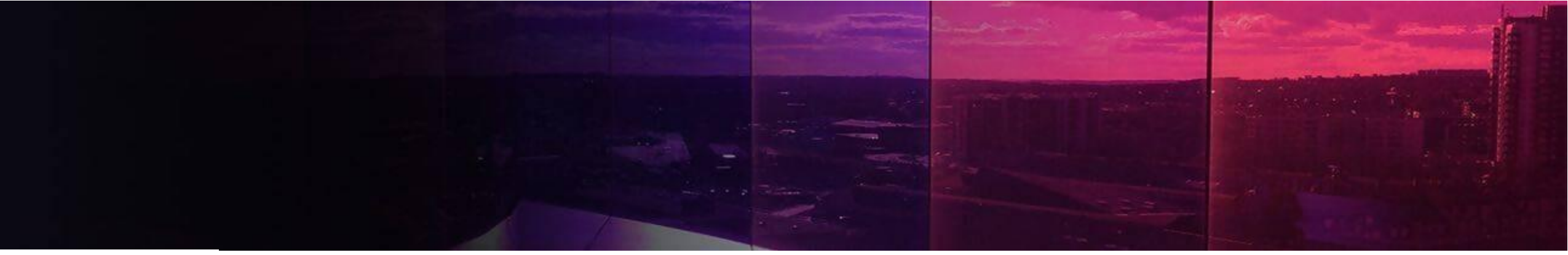
ProSeries Robot

A screen-reading agent on the Windows server opens each worksheet, places every value by vision, types it and keeps a screenshot of the box after typing — a ledger of filled and skipped fields with reasons.

Worksheet Rules Engine

The Info Worksheet, Form 8867, identity verification, e-file authentication, Schedule B Part III and student worksheets are answered from the client's facts, each with a written reason — never a default the CPA cannot trace.

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Run Report and Evidence

Live progress per form, the printed 1040 compared line by line with last year's return, and every typed box backed by its evidence crop for the preparer's final review.

AWS Services and AI Models Used

AI Models

Large Language and Vision Models	Provider-Agnostic Model Layer
Document reading and box placement • Form detection and box-by-box extraction • Mapping each value onto the ProSeries screen • Answering worksheet questions from facts	Portable by design • Models accessed behind one abstraction layer • PaddleOCR for scans and photos, text layer for PDFs • Ready for Amazon Bedrock models as they ship

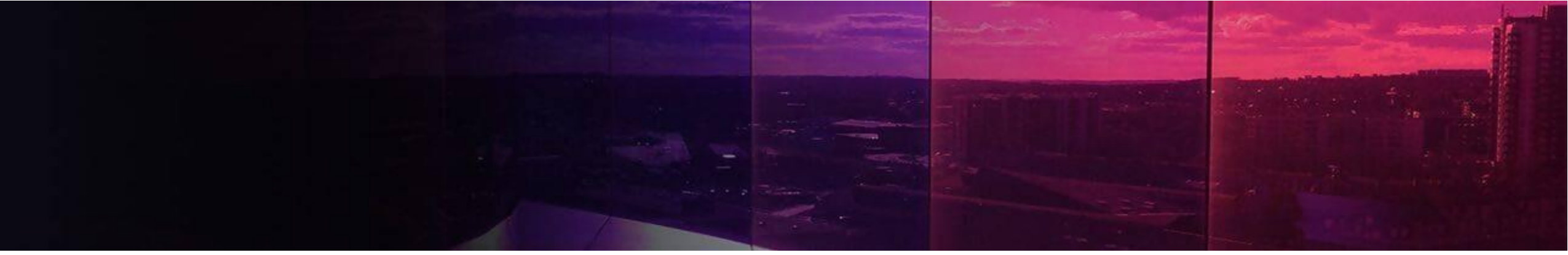
AWS Cloud Services

• Amazon EC2 — Windows server running ProSeries and the robot • Amazon RDS for PostgreSQL — clients, documents, runs and audit trail	• Amazon S3 — documents, evidence and signed robot releases • Amazon EC2 (Linux) — FastAPI backend and React portal

Results

- **Speed**
  - A return's documents read, reviewed and typed into ProSeries in minutes rather than hours
  - Document collection cut from weeks of email to one checklist
- **Accuracy**
  - Every typed box backed by a screenshot of the field after typing — nothing enters unrecorded
  - Wrong-person and wrong-year documents caught at upload, before a preparer touches them
- **Coverage**
  - Fifteen-plus form types, from W-2 and 1099s to 1095-A, 1098-T and partnership K-1s
  - Worksheet questions answered with a stated reason, or flagged when unanswered
- **Security**
  - Verified sign-in, per-client data isolation and encrypted identity documents
  - Signed robot releases distributed from S3 with one-click updates for the admin

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Benefits

- Hours-not-days return preparation from a folder of client documents
- One relational record of every document, box, answer and run, ready to audit
- AI-read values that preparers review, correct and approve before anything is typed
- Per-client security with verified sign-in and encrypted storage
- Evidence for every field and a line-by-line comparison with last year's return
- Provider-agnostic model layer — portable and future-proof across foundation models

Next steps

- Extend the reader to 1099-G, W-2G, 1099-MISC and S-corporation / trust K-1s
- Add state returns and part-year, nonresident allocation worksheets
- File FinCEN Form 114 (FBAR) and Form 3520 from the foreign-account answers
- Move document reading and box placement to Anthropic Claude on Amazon Bedrock
- Add e-signature of Form 8879 and client delivery of the finished return
- Scale to multi-office firms with role-based access and organization workspaces

About Shri Sai Tech LLC DBA SST

SST is an AWS Partner specializing in AI-driven, cloud-native architecture and secure, compliant solutions across a wide range of industries — including healthcare, finance, education, retail, manufacturing, logistics, energy, government and public sector, telecommunications, and media and entertainment. Partnering closely with our clients, SST rapidly designs and deploys production-ready AI platforms on AWS, bringing AI-powered capabilities to market with speed and confidence.

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