

Case Study



Tax Preparer X-TAX uses Fujitsu ScanSnap for more efficient tax returns and paperless office

X-TAX is Lansing, Michigan's leading retail tax preparer, and a CPA firm open year round. The company, established in 1998, was named by the Lansing State Journal as one of the fastest growing businesses in the Lansing area. After preparing only 75 returns in its first year of operation, X-TAX now prepares over 7,000 tax returns, and has grown from just one employee in 1998 to 35 for 2009. In addition, X-TAX has expanded from one-single desk, to three offices spanning the North, South and West corridors of Lansing.

Business Needs

In 2006, at the cusp of growth for the company, X-TAX began implementing ATOM software, a tax management service that affordably and easily transitions a tax office to a paperless process.

“It was a gamble,” explains Andrew Cleary, X-TAX office manager. “The tax business relies so heavily and for so long on paper, W-2’s, 1040’s and a slew of other tax forms. Our primary goal was to save time for the client by providing a quicker filing experience, and streamline our office functions. X-TAX accomplished these tasks, and also saved money, time and lots of paper.”

Solution

Establishing a paperless tax document virtual warehouse, particularly one that grows year after year, requires a management system capable of being accessed across the entire organization, and from multiple offices. Further, any system selected had to allow for easily retrievable, quickly processed, and protected transactions.

Given the need for secured storage, as well as quick and remote access to both present and previous tax filing information, X-TAX offices began implementing ATOM software, and installing the compatible Fujitsu ScanSnap S510 scanners at each of its tax preparers’ desk. Previously, the offices relied on one central scanner that often required “a numbered ticket to use, just like the bakery,” according to Cleary.

Now, with the individual ScanSnap scanners and ATOM software working seamlessly together, important tax documents such as identification documents (driver’s licenses, Social Security cards, Passports), present year tax forms, and previous year tax returns, to name a few, could be scanned and digitized quickly, easily and conveniently.

“Along with being compatible to ATOM software, the Fujitsu ScanSnap scanners clearly and efficiently provided an easily readable facsimile of our documents that were readily available to each of our preparers’ computer screens,” stated Cleary.

X-TAX’s clients generate approximately 10-15 pages of documents each year, which would typically be housed in cumbersome folder files that were “filled to the gills,” quoting Cleary, and “snugly nestled in bulky filing cabinets.” Thus, often times client’s records could not be easily located. Fujitsu ScanSnap scanners and ATOM software now make these countless pages of digitized documents immediately and centrally available online. Each X-TAX preparer, whether they are in the main office or a satellite office, can simply click a button to view a client’s records, and provide on-the-spot assistance to the client, without having to search through file drawers that may or may not contain the client file in question.

“Many times, given the busy nature of our offices, files we’re inadvertently left on the preparer’s desk after a return was filed. Thus, if the client called another preparer with questions about their return, locating the file required an ‘all points bulletin’ in the office,” said Cleary. “Now, our preparers simply use their personal Fujitsu ScanSnap scanners to scan in all the relevant documents and return the hard copies to the clients. The scanned documents are then automatically inputted into the clients’ files online, where the information can be retrieved in a flash and upon any of our clients’ requests.”

Benefits

For the first time during the 2008 tax season (in layman’s terms the filing date period of January to April 2009), X-TAX went completely paperless. The results were impressive. X-TAX saw: a 9% rise in the number of clients with a record setting 7,000+ returns filed; a decrease in the average client wait time for a preparer from approximately 30 minutes to 15 minutes; and a \$9,700 cost savings by eliminating the purchase of office paper, toner and file folders.

Moreover, according to Cleary, the newly paperless tax office ran much smoother, as preparers only had to deal with two computer screens and a small, and easily housed Fujitsu ScanSnap scanner at their desks, rather than reams of papers, and dozens of over-stuffed and often unaccounted for files—and a line at the previously shared lone office scanner.

“While we realized better service and greater costs savings with the collaboration of the Fujitsu ScanSnap and ATOM service, probably the best thing that happened was the amount of time it gave us out of the office,” said Cleary remarked. “In previous years, we worked practically around the clock during the peak filing periods, and days off were unheard of. This year, not only did we leave the office at a reasonable hour, but I was able to take some time off and get an early start on my golf game!”

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