

# Taking the sting out of tax returns



Accountants Casey Lester uses Fujitsu's ScanSnap desktop scanner to ensure all deadlines on tax returns are met – wherever the client is.

Casey Lester is a two-partner firm of chartered accountants, based in Amersham, Buckinghamshire, specialising in business start-ups and personal tax, as well as dealing with company accounts and audits, business advice and tax compliance work. It prides itself on providing clients with a personal, cost-effective and first-rate service and makes use of the latest technology to ensure that it can.

One of the key dates in any accountancy firm's calendar is the 31st January tax return deadline. With stiff penalties for returning tax returns late, it's vital that Casey Lester does everything it can to ensure clients' forms are approved and sent off in good time.

Previously, to avoid last minute delays in securing signed approval on the forms, accountants have posted the full document, requesting clients to send back the final page signed. The preceding pages – which contain all the useful information – are then completed once further information is received from the client. This last resort ensures that, even if information is received at the last minute, there's no delay in getting a signed form back and into the Inland Revenue. However, it's not an ideal situation – it's expensive on postage and it is better that clients see the completed form so they can discuss it.

Casey Lester was looking for a device that the team could use to speed up the tax return process, scanning in tax return forms and other documents and emailing them to clients. This would enable them to secure signatures quicker – and ensure that both parties could see the full tax return quickly, ready to discuss any potential changes.

## Easy to set up

The scanner was quick to install, as Tony Healey, partner at Casey Lester confirms: 'It was a piece of cake to set it up: even our most ardent technophobe wouldn't have had a problem. Once it was installed, it was immediately put to use. It made a huge difference to the way in which we deal with clients – especially overseas clients. Not all our clients have fax machines – and for those that do, faxing forms over can be very time consuming.

'With ScanSnap, all we had to do was to scan in each completed form and email it over to our clients for them to approve. It was a much quicker process than normal – and it was easier for us to discuss particular points with clients too. In terms of communicating with clients who are more than a day's postage away, it has been invaluable.'

The other consideration for Tony was space – in such a paper-driven environment, space

is at a premium. The size of the scanner was a real bonus: 'It simply sits on my desk, taking up very little room, just getting on with the job. A large scanner can be overpowering in that you need to use it to justify the cost and space. But this scanner is so small it's easy to feed paper into it as you go about everyday tasks.'

## Space saving

It's also saved an incredible amount of space in terms of filing information, both online and offline. 'If it's A4 or below and is flat, it gets put into the scanner's document feeder. We scan in about 200 documents a day – for example, all the bank statements that arrive are scanned and saved as PDFs. Saved as black and white documents, the files take up very little storage space on our system. Some of the paper is pretty fiddly, but the paper feeder doesn't seem to mind. Whether paper is single or double sided, documents are scanned in remarkably quickly. It's very impressive.'

'Scanning into Adobe Acrobat 6.0 will be very useful as there's even more security features on the product. We've also heard that the ScanSnap will be able to scan into Word and Excel soon – that's something we'd be very keen to see,' comments Tony.

'At the beginning of the year, the only focus for us is to ensure we hit the January deadline for all our clients. ScanSnap really helped us with this process. But once we've had some time to really think, I'm sure there are plenty of other uses for it that we haven't even considered yet.'

Casey Lester are so impressed that they're looking to buy a couple more units – high praise indeed for a company focused on managing money.

