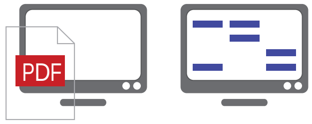
Best Practice 4—Implement Dual Monitors



A sound paperless process requires dual monitors at every preparer's workstation. Dual monitor workstations enable professionals to view multiple documents simultaneously, eliminating the hassle of toggling back and forth, minimizing and maximizing documents repeatedly, and working between monitor and paper copies. Dual monitors make it easy to prepare and review returns, because you can open digital workpapers on one screen and tax preparation software on the other—for full on-screen review. Taking the review process "on-screen," without a doubt, will reward you in hours saved during the busy tax season.

Best Practice 5—A Little Adobe Acrobat Training Goes a Long Way

Once you begin scanning documents, it is imperative to work with digital workpapers the same way you would paper versions. "Working" with documents refers to editing tasks, such as ticking and tying information. The best way to digitally tick and tie documents is through Adobe Acrobat Standard or a comparable PDF editing program. And OPSIÏK(PPZTW[Wropriately train staff on the application's broad functions.

Training staff to use software tools that make it easy to work with electronic documents prVØPNOSÄÏ[een review process. Adobe Acrobat provides several useful and timesaving tools that accelerate the tax preparation process. For example, the application's "comment and markup" toolbar has just about everything required—allowing you to make tick marks (the software refers to tick marks as "stamps") and comments directly on documents. These comments are conveniently date- and time-stamped with the commenter's name.

Familiarize yourself and your staff with Adobe functionality. A little training will help staff leverage the full editing power of the application and save significant time during the review phase. Use of Adobe also supports a paperless process—no highlighters or sticky notes required.

> "The most efficient paperless tax workflow requires more than just an automated process for organizing and extracting tax data. When we implemented our paperless process, we encouraged all tax professionals to learn how to work with the scanned documents as you would with the original paper documents. We made sure our staff became proficient with Adobe. We've been very focused on training our staff to learn how to work with electronic workpapers – using Adobe to add notes and tick marks."
>
> ***—Suzanne LoBiondo, CPA***

There are no shortcuts when implementing a paperless tax workflow. Time and effort is involved to ensure long-term success. This includes researching technologies, training staff, and following through on all phases of implementation. Remember also that technology is a big part of the paperless process, but the technology selected is only as good as the broad process that supports it. With this in mind, firms must follow the five key implementation best practices identified here to support a true paperless workflow—one that will ultimately pay rewards in the form of unprecedented efficiency gains. These five best practices include:

1. **Identify the Right Scanner and Scanning Process**
2. **Implement a Paperless Tax Workflow Solution**
3. **Develop an Electronic Filing "System"**
4. **Implement Dual Monitors**
5. **A Little Adobe Acrobat Training Goes a Long Way**

Following these practices will keep your firm on the right paperless path and have you enjoying the benefits of a complete paperless tax workflow before you know it. Happy trails!