


Case Study



CPA firm looks for document processing solution to help speed tax, accounting tasks

Gillespie & McMahon is a Seattle-based CPA firm that provides a range of financial services, including accounting assistance such as audits, reviews, and bookkeeping, tax preparation and reporting, business consulting, and estate planning. The firm, which is a continuation of a company that was founded in 1967, specializes in helping small businesses and individuals.

Business Needs

For a long period beginning in the 1990s Gillespie & McMahon used a tax preparation software solution from Accountants Microsystems. However, over time the product's support declined and upgrades became more problematic.

The firm decided to migrate to the ProSystem fx accounting software from CCH, a business unit of the global tax and accounting services provider Wolters Kluwer. The ProSystem fx solution provided a broader set of capabilities, including the ability to manage a greater range of tax and accounting forms. ProSystem has scanning capability, which provides sophisticated data entry capabilities when combined with scanning hardware. This led Gillespie and McMahon to look for scanners that would integrate seamlessly to help create bookmarked tax workpapers.



Michael Gillespie, owner and principal at the Seattle accounting firm Gillespie & McMahon, uses a compact Fujitsu fi-6130 scanner for easily importing clients' tax and other documents for processing.

Solution: Firm Deploys Fujitsu fi-6130s and Fujitsu fi-6140 Scanners

While Gillespie & McMahon could have chosen any TWAIN-compliant scanner hardware, they decided to standardize on the Fujitsu fi-6130 and fi-6140 scanners. The fi-6130 is a compact sheet-fed device for monochrome and gray scale documents capable of scanning up to 80 pages a minute. The fi-6140 adds color duplex scanning capability with up to 60 pages a minute and is used by the firm as a workgroup scanner.

“We had a couple of Fujitsu ScanSnap scanners in the office, and they were extremely reliable,” says Michael Gillespie, Owner and Principal at the firm. “CCH also recommends the Fujitsu scanners for their quality. Fujitsu has the best reputation when it comes to scanning hardware, so we felt it would be a smart decision to standardize Fujitsu hardware for the CCH solution.”

The fi-6130 and fi-6140 scanners are very compact, enabling some Gillespie & McMahon personnel to keep them on their desktops. In a minute or less, the devices can scan the various forms and associated documents—such as W2s, 1099s, and dividend information—required to fill out an individual or small-business tax return. A combination of Fujitsu scanning software and the CCH solution captures the information and immediately exports it to the ProSystem software, populating fields with the appropriate information. The ProSystem software alerts the accountant if there is missing information and provides a “diagnostic” process that warns of any potential errors.

Benefits: Fast, reliable performance helps reshape business processes

With the Fujitsu scanners and ProSystem software, Gillespie & McMahon have a reliable solution that not only expedites routine client tasks, such as preparing tax returns, but is also helping transform the way that the company does business.

It starts with the scanners, which have proven to be extremely reliable. “The Fujitsu scanners are easy to use, requiring minimal training, and work flawlessly,” says Gillespie. “Sometimes we accidentally feed a stapled document or a paperclip into a machine. It’s not a big deal because jams clear easily. It simply halts the scanning process while we pull out the object, then start again.”

The combination of Fujitsu scanners and ProSystem software work so quickly that the documents for a typical small-business owner’s tax return can be scanned, imported, and then displayed on IRS forms on a computer screen within a minute or two. This provides a client in the office with nearly instant information on his or her tax return.

“CCH claims that the solution can save 15 to 20 minutes or more processing an individual return, which adds up to significant time considering the hundreds of returns we prepare,” says Gillespie. “And more importantly, the efficiency is leading us to redesign our processes.”

He explains that the firm is using less expensive clerical help to perform more basic tax-return tasks while getting data into the system faster than in the past.

“We’re also able to retain more of our client documents because it’s so easy to store digital images as opposed to paper documents,” Gillespie says. “That makes it much easier to access archived documents when our clients have questions. The Fujitsu scanners and CCH software are helping us transform our business so we operate more efficiently and serve our clients more effectively.”

Gillespie & McMahon benefit snapshot:

- **Nearly instant feedback on tax returns following while-you-wait scans of tax documents**
- **Extremely reliable scanner performance**
- **Helps to transform information-intensive business by making it possible to use less-expensive clerical help for managing large volumes of vital documents**

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