

# Urish Popeck & Co., LLP

DOC.IT HAS HELPED TO IMPROVE STAFF EFFICIENCY;  
THEY ARE GETTING MORE OUT OF THEIR DAY BY WORKING  
ON MORE JOBS, WHICH LEAD TO MORE PROFITABILITY.

## PRODUCTIVITY

By going from paper-based to paperless with Doc.It, we saw a 20 to 30 percent improvement in efficiency with staff and manager time in getting the majority of jobs out the door. It was during year two with Doc.It that we noticed the biggest jump in productivity.

You can relate to how Doc.It impacts productivity, when you consider what your process is when a client calls and needs three years of their tax returns for loan application, because they are planning to close on the loan tomorrow. Before Doc.It, I would have to go to the file storage room, pull, scan, photocopy or, even worse, have to order a file from offsite storage, which could then take 12 to 24 hours to get to us. With Doc.It, I have the ability to send those three documents in three clicks, as opposed to what we had to do before Doc.It. With Doc.It, our access to tax returns and files has improved noticeably.



Location: State College, Pennsylvania

## PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite

CaseWare

CCH ProSystem fx

Peachtree & QuickBooks

# 60

Doc.It® licenses



# Learn how Doc.It® impacts work in our firm

## PROFITABILITY

With Doc.It, we can do more with less. Doc.It has helped to improve staff efficiency; they are getting more out of their day by working on more jobs, which lead to more profitability. If we are more efficient, our staff can work on more clients in a given day, therefore taking on more clients than we had when we were paper-based. These results add to our bottom line.

## MITIGATION OF RISK

Our ability to backup and have copies of client records electronically, opposed to how we operated as a paper-based firm, provides dramatically more security because we do not have paper file cabinets that are locked but accessible by someone.

With offsite paper file storage, things can happen. If something does happen, we cannot recreate those files. With Doc.It, we have everything stored in the Doc.It Archive, an electronic file cabinet with redundancies; we have a backup and can restore it.

Although we tried to have standardization as a paper-based firm, Doc.It made our processes more standardized. Today, we keep next-to-nothing in our paper file cabinets. We keep the traveler document that goes with the tax return, along with a live copy of client engagement letters in files, but that is it. Before Doc.It, every year we kept a two-inch thick file with client information for each client. Today, that volume of files is stored in the digital archive and the only papers we keep are cover sheets and engagement letters.

Because we use the Doc.It Archive, our offsite storage has been cut back dramatically. When we adopted Doc.It, we had eight years worth of files offsite; as the document retention policies expire, we destroy those and put very few new documents in there. Because we use Doc.It's Archive and put very little into storage, we have been continuously reducing offsite storage.

## OUR FAVORITE FEATURE IN DOC.IT

The convenience of having information so readily available is what I place at the top of the list of favorite aspects of working with Doc.It. With Doc.It, in a matter of mouse clicks, we have the ability to get at information that would have taken minutes, hours or even days to go get.

