Kennedy McKee & Company

MOST OF OUR EFFICIENCY GAINS ARE IN RETRIEVAL. EVERYTHING WE DO EVENTUALLY GETS FILED INTO DOC.IT BINDERS FOR TAX AND THE DOC.IT ARCHIVE. BECAUSE OF THIS SYSTEM, IT IS EASIER TO RETRIEVE FILES FROM ANYWHERE.

PRODUCTIVITY

We use ProSystem fx Engagement for audit and corporate tax. We publish from ProSystem fx Engagement to the Doc.It Archive. The end result is the file copy (PDF) of the audit. It works really well. This is beneficial for me because I can easily access last year's work papers instead of going back to last year's engagement binder.

Before Doc.It, we had an extremely good paper system using CCH tax organizer. I could pick up any partners' tax return and find whatever I wanted to find. We duplicated that paper system into Doc.It. Since the adoption of Doc.It, I have noticed that our tax files are a lot thinner. With Doc.It, we use Advanced Forms Recognition (AFR) to scan tax organizer pages into the Doc.It Binder.

Most of our efficiency gains are in retrieval. Everything we do eventually gets filed into the Doc.It Binder for tax and the Doc.It Archive. Because of this system, it is easier to retrieve files from anywhere.

PROFITABILITY

What I have noticed is time-savings with our professional staff who work up front in our office; they used to be swamped but that is not the case anymore. Some firms' clerical people scan everything up front. we do it differently: We interview the client and make sure everything we need is in the file and then the professional staff person does the scanning and organizes with the tax organizer. We use Doc.It's AFR and separate by Schedule C, Schedule F, tax return papers, etc. Everything has its own bookmark.

Referred by K2 Enterprises

Location: Dodge City, Kansas

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite

CCH fx Engagement

PPC Binder

UltraTax CS

Practice CRM

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Doc.It® licenses

Learn how Doc.It® impacts work in our firm

Before using Doc.It, maybe once a month, a file would go missing. Today, because we follow our process, files do not go missing. We may have rare instances where an engagement binder was not published to the Doc.It Archive but, because the engagement binder is in the Doc.It Binder, we have all the documents and nothing is ever missing.

Our turn-around time is really good: Our average is less than two weeks. A lot of times our turn-around time is one week, which is unheard of. We attribute this quick turn-around time to keeping everything in real-time. For example, when an 8879 comes in from the client, we scan it and finalize the binder and publish it at that time. Many firms will wait until tax season to do all this stuff. We don't wait. We do this when it streams in.

MITIGATION OF RISK

We work with Xcentric: They hold all of our firm's data. We made the move to Xcentric for security and disaster recovery reasons. Today, with a computer and Internet connection, we can access all of our data from anywhere and get back in business. Because we work in real-time and everything is in Doc.It Binders or the Doc.It Archive, what we need to get back to work is always there whenever we need it.

OUR FAVORITE FEATURE IN DOC.IT

One of my favorite features is the roll-forward feature in the Doc.It Binders - it works well and saves us time. We put together a template and document checklist and it is rolled forward and ready for the next year. It is very efficient.

The Doc.It Archive is another favorite feature because I use the archive every day. I use the archive to look at billings, tax returns or correspondence. The archive is easy to navigate because it is split out into type of service, a correspondence folder and billing folder.