



SCAN-AND-POPULATE
SOLUTION WITH OCR &
WORKPAPER PREPARATION
TO STREAMLINE THE
1040 TAX WORKFLOW

Huth Thompson LLP

Huth Thompson LLP

Shares Their Firm's Story

Interviewed: Cindy Bupp, EA, Manager,
Huth Thompson LLP



Stats at a glance

Goals: Implement a scan-and-populate solution with Optical Character Recognition (OCR), automatically bookmark and export data, automate bookmarking and indexing of scanned workpapers.

Results: Decreased turnaround time per return from 7-10 days during tax season, to 3-4 days. Eliminated the review process for approximately 1/3 of returns. Removed ambiguity about source of information during tax return review.

Office locations: Rensselaer, IN;
Lafayette, IN

Employees: 45-50

Website: www.huththompson.com

Associations: Rootworks

Technology of choice: Ultratax,
1040SCAN and SPbinder

Background

The team at Huth Thompson LLP prides itself on being ahead of the curve. They have always taken a proactive approach in embracing new technology and have been an entirely paperless office for many years. It's this forward-thinking attitude that made SurePrep's scan-and-populate solution, 1040SCAN, an ideal fit for the firm.

Previously, they would scan and name documents one at a time and manage the PDFs through Thomson Reuters Engagement CS software. Eventually, the firm decided to seek a new solution that offered Optical Character Recognition (OCR) to automatically bookmark scanned documents and export data to tax software.

In 2015 they were referred to SurePrep by Rootworks, an association of like-minded firms, and have been using 1040SCAN and SPbinder ever since.

The importance of 1040 tax workflow standardization

As a customer of SurePrep, Huth Thompson found that they have a similar tax

philosophy regarding the importance of standardization. The firm strongly believes that it is vital to use the same process for every return no matter how simple or complex.

"Even if it's just a W2, we're still going to require every return to have a questionnaire filled out," said manager Cindy Bupp. "It's part of the due diligence we require. It's just easier to use the same system on all returns. We've found that as soon as you go around that system, you increase the potential for errors."

"It's just easier to use the same system on all returns."

- Cindy Bupp

SurePrep was able to help Huth Thompson maintain their standards and streamline workpaper organization with SPbinder which follows the flow of the tax return and makes it easy to keep track of all documents and data.

What made the decision even easier was that SPbinder is included with 1040SCAN. A bespoke tax workpaper system, like

SPbinder, minimizes review time and is one of the [5 Components of a Successful Scan-and-Populate process](#).

When attempting to truly standardize processes, some firms experience resistance. For example, one partner might want his or her returns prepared in a slightly different way than another partner. While Huth Thompson was not immune to this, they were able to set aside their individual preferences and establish a uniform process for the greater benefit of the firm.

"If you have a professional partner group, they can compromise and come up with what works best for your firm," Bupp said.

Increasing 1040 tax efficiency by reducing review time

Since implementing 1040SCAN, the firm has noticed a significant reduction in time and effort for the review staff. What was initially the most tedious step in the return process is now being completed at the same speed as preparation and verification.

"It would be 7-10 days in peak time for a

return to get through review," Bupp said. "Now we're looking at 3 or 4."

"It would be 7-10 days in peak time for a return to get through review.

Now we're looking at 3 or 4."

- Cindy Bupp

"The reviewer has less documents they have to look at. They're going to do more of a theory review of the return instead of all the data input."

The efficiency of 1040SCAN has even enabled the firm to fully eliminate the traditional review process for approximately 1/3 of their returns.

"If you have a return that's all standard documents, first you go through verification and then you look at those documents again once they're in the tax software and then that return is done and heading out the door," Bupp said.

"Now obviously those tax returns are given to someone that has some experience. It can't be a green preparer," she added.

"It just makes life easier. **It's tremendous efficiency.**"

- Cindy Bupp

Bupp also expressed her satisfaction with the sign-off tracking features in SPbinder, noting how SurePrep's workpaper system has allowed them to use sign-offs in preparation, verification and review, helping them track the process and ensuring that everyone is on the same page.

"You're not questioning where people got the information," Bupp said. "We don't have somebody sitting back here with their list trying to recognize what the form was and naming it."

She added that the annotation tools and hyper-linked cross-references in SPbinder are "fabulous" and have taken even more time and effort out of the reviewer role.

"It just makes life easier. It's tremendous efficiency."

Optimizing tax software implementation with unlimited support

For Huth Thompson, the transition over to a scan-and-populate solution and workpaper system like 1040SCAN and SPbinder was easy, in part because they were already a paperless office. However for the questions, concerns and requests that they did have, they have been extremely happy with SurePrep's unlimited customer support.

"I've never worked with a company that has such **instant access to support.**"

- Cindy Bupp

"I've never worked with a company that has such instant access to support," Bupp said.

The support team is available via email, phone, chat and GoToMeeting and maintains a 98% Customer Satisfaction Rating, 2% higher than the industry average.

Final words

Implementing SurePrep's scan-and-populate solution has helped Huth Thompson LLP make remarkable strides in their 1040 tax workflow efficiency while

continuing their pursuit of innovation. By automating the chore of manually scanning, naming and bookmarking documents and reducing data entry into tax software, 1040SCAN has allowed their tax professionals to spend that time using their actual expertise. And with SPbinder by their side helping them track their work, the firm has become faster, sharper and is constantly moving forward.

“If you have a professional partner group, they can compromise and come up with **what works best for your firm.**”

- Cindy Bupp

About SurePrep

SurePrep was founded in 2002 and is the leader in 1040 productivity for CPA firms. We deliver seamless integration with your existing tax software to automate and streamline the entire 1040 process for both the taxpayer and CPA. Our solutions are used by nearly 20,000 tax professionals ranging from Big 4 firms to sole practitioners to reduce administrative costs, automate workpaper preparation, maximize review efficiency and improve client service.

2023.02.23