ScanSnap

Customer Story:

Mountain State Tax Service Leads the Way

Tax and Accounting Firm
Conquers Annual Paper Flood.

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THE CRAZY SEASON

Every tax and accounting firm goes through what they call "the crazy season" – that period between January and April, when their personal and corporate clients are required to file their annual tax returns.

Mountain State Tax Service (MSTS), a tax and accounting firm with offices in West Virginia is no exception to this rule.

Under the guidance of Chief Operations Officer John Brennskag, MSTS provides clients with tax services – including representing those with major tax issues, such as back taxes, liens and levies – based on a simple philosophy: "Taxes Made Easy, Taxes Done Right."

However, fulfilling that philosophy is a challenge because of the sheer volume of paper that inundates them annually as customers send them the business documents needed to figure out what they owe in taxes.

A second-generation tax accountant (his father founded the practice) and recognized as an Enrolled Agent – a federally licensed practitioner authorized to represent taxpayers before the IRS – Brennskag has always been laser-focused on efficiency and productivity. This is even more crucial when representing clients before the IRS, since that requires even more complex paperwork than routine tax forms, such as correspondence, receipts, power of attorney forms, etc.

As early as 2005 he recognized that digitizing their paperwork using scanners could greatly help improve efficiency and productivity. Initially, MSTS acquired scanners from a different company for all their associates.

The scanners "worked ok", but tended to jam. That meant someone had to physically monitor the process when a large file was being scanned and deal with the inevitable hiccups. Not only would scanners sometimes jam, but occasionally two or more pages would slide through together without being scanned. This meant MSTS staff had to take the time to count all the paper pages and confirm they were all correctly scanned, which sometimes took longer than the scanning process itself!

SOLUTION

With his continual focus on improving efficiency – even down to figuring out how to reduce keystrokes – Brennskag decided to look at other models.

Recommended Solution:

Black iX1600

White iX1600

Product Features:

- Fast, double-sided scans up to 40 pages per minute
- Touch screen controls
- Scan business cards and receipts with automatic de-skew, image crop and rotate
- Scan direct to cloud storage (Google Drive, etc.)
- Personalized profiles

Note that the ScanSnap iX1600 model supersedes the ScanSnap iX1500 model

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When he tried out ScanSnap for the first time, he quickly discovered that not only was ScanSnap's scanning speed much faster than the competition, its single-button interface greatly simplified the entire process.

He reported being particularly "blown away" by ScanSnap's blank page deletion and autorotation features, which definitely helped make life easier during a 12-hour workday. As a result, it didn't take him long to replace all their original machines. Since then, they've upgraded to the iX1600 model and have also purchased portable units that they can use when they visit clients.

BENEFITS

Tax firms typically hire seasonal staff to help out during the "crazy season" and new hires often must be trained in various processes and specialized software applications in order to be productive. One reason Brennskag chose ScanSnap scanners is they are "super simple", requiring almost no training time.

Thanks to ScanSnap's superior paper handling and ultrasonic paper detection technology, jams and skipped pages have been drastically reduced, enabling employees to spend more time on value-added work, rather than monitoring a scanner or counting pages.

MSTS' long-term goal is zero paper document retention, ultimately moving to cloud-based storage. But, for now, all files are scanned directly into an internal, onsite server where they can be securely stored.

When asked if he would recommend customers get ScanSnap, Brennskag mentioned a customer – a sizeable HVAC contractor – whose staff need to fill out warranty information for new installations. While the customer retains the original warranty documentation, the HVAC company needs a copy for their files. After consulting with MSTS, they've decided to deploy ScanSnap scanners on their fleet of trucks so they can quickly and easily capture warranty and other forms on-site as soon as the installation is completed.

"Customers come in with their paperwork and we scan everything. We have multiple offices, so having documents captured at initial contact is helpful because I can work with documents wherever I am."

— **John Brennskag,** Chief Operations Officer, Mountain State Tax Service

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