



CCH ACCOUNTANTS' SUITE
INTEGRATED. INTELLIGENT.

CCH Scan

The intelligent path to a paperless future

CCH Scan is an innovative solution that works perfectly with Taxprep®

Part of the CCH Accountants' Suite, *CCH Scan* sorts and organizes scanned slips into a single bookmarked PDF file that can be attached to the return in *Taxprep* or merged into a single PDF that contains the tax return and scanned source documents.

THE WAY OF THE FUTURE: paperless and automated

Last year

more than
300,000

tax returns
were processed
with *CCH Scan*

more than
700,000 slips

were imported into
Taxprep using
CCH Scan

most of the major
accounting firms
across Canada

used *CCH Scan*

Maintaining a highly productive and efficient accounting practice isn't easy, especially during tax season when there are piles of documents to sort and process, and endless hours of data entry, reviews and file searches. But what if you could significantly reduce manual tasks in your T1 process such as sorting and data entry, and retrieve your clients' source documents with a mere click of the mouse?

This is the way of the future in tax and accounting: paperless and mostly automated. With *CCH Scan*, a leading-edge paperless solution that streamlines your tax preparation workflow and reduces your paper use and management costs, you can start advancing towards this future today.



Increased productivity and revenue resulting from a more automated and streamlined workflow, with less time wasted searching for paper files.

Reduced costs, thanks to decreased paper use and simplified paper management and storage requirements.

Benefits that will *transform* your practice –
and your team

Talk to your CCH Account Manager today about how you can enhance your tax returns workflow with *CCH Scan*.

Or sign up for a FREE *CCH Scan* demo webinar at www.cch.ca/scan.

ADVANCING TOWARDS a paperless future

Seven tips to ensure your success with *CCH Scan*

- 1. Implement *CCH Scan* in stages** for a smooth, progressive transition that ensures staff are fully trained at each stage.
- 2. Take the time to show** your administrative staff how to scan properly. Your preparers and reviewers will adapt to *CCH Scan* more quickly if they see consistently clear scanning output.
- 3. Use a good sheet-fed scanner** that will easily scan in batches all types of source documents, including small documents such as slips and receipts.
- 4. Use dual monitors for reviewing** corresponding documents, and for entering data from PDF files. You'll save paper this way.
- 5. Take advantage of optional add-ons** such as PDFlyer, which lets you insert digital notes or flags within a PDF to ensure important comments are captured electronically during preparation and review.
- 6. Use *CCH Scan* with *Taxprep***, advanced tax preparation software created by CCH that integrates perfectly with *CCH Scan*.
- 7. Add advanced options such as *AutoFlow***, which automatically imports data from more than 45 common T-slips into the T1 return in *Taxprep*. Remote Validation Service lets you submit scanned slips through a secure server; and within two to 24 hours, CCH professionals will validate the slip values and organize them into a single, bookmarked PDF ready to import into *Taxprep*. Automatic synchronization and comparative review with *Taxprep* make reviewing faster and more precise.

Improved customer service and response to CRA queries, with faster retrieval of digital files.

More optimal use of human resources as preparers and reviewers move away from repetitive manual tasks.

Better work-life balance, with less demand on staff members to work long days during tax season.

Taking the path to paperless



***CCH Scan* has made a big difference** in the Brampton office of MacGillivray, an Ontario accounting and business consulting firm with two other locations in Hamilton and St. Catharines. Since it installed *CCH Scan* in February 2007, MacGillivray has reduced the time it takes to finalize complex returns from about 20 minutes to a mere five minutes. In fact, in the last three years, MacGillivray has been finalizing about two-thirds of all returns in the last 72 hours of tax season. **"We run it all with one administrative person,"** says David Straughan, who leads the income tax practice in MacGillivray's Brampton office. **"In the old days before we installed *CCH Scan*, there was no way we could compress time like we do today."** *CCH Scan* has also allowed MacGillivray to expand its returns volume. The firm now does 30 or 40 more returns each year – and it's doing it all through a paperless workflow. **"What *CCH Scan* gave us is a path to paperless,"** says Straughan. **"We're doing more now without spending long days at the office."**

Did you know?

***CCH Scan* recognizes more than 140 types of documents.**

CCH WILL GUIDE YOU Every Step of the Way

As you transform your practice from paper-based to paperless, the experts at CCH will be there to guide you from start to finish.

- Installation and configuration.** Our technical experts will install and configure *CCH Scan* to ensure it is optimized to meet the needs of your practice.
- Comprehensive training.** We've made training an essential part of your move towards a paperless workflow. We also offer one-on-one training to help you prepare for tax season.
- Ongoing support.** CCH is known for offering market-leading support. As a *CCH Scan* user, you'll have direct access to our team of highly experienced and knowledgeable customer support professionals.

A strategic approach to going paperless

CCH Scan makes it easier to go paperless through a staged approach that ensures a smooth transition and gives your team ample time to adjust to your enhanced workflow.

STAGE 1:

Start using *CCH Scan* for back-end scanning and archiving — an approach taken by many firms. In this initial stage, your use of *CCH Scan* is limited to scanning documents after returns have been completed so you can develop scanning expertise while building a digital archive you can easily access for CRA post-assessment queries.

STAGE 2:

Front-end scanning with *CCH Scan*. You progress to scanning documents before the return is prepared and reviewing from the PDF files created with *CCH Scan* and *Taxprep*. You can circulate both PDF and paper files to let team members adapt at their pace.

STAGE 3:

Front-end scanning with data entry from PDF files. With your administrative staff now fully trained in scanning documents, you start entering data from PDF files. Your preparers will also be opening, marking up and finalizing returns with the PDF attachments.

STAGE 4:

At this stage, you can advance to one or both of these options:

- Use *CCH Scan's* AutoFlow technology together with *Taxprep* – the country's most advanced tax preparation software – to eliminate hours of data entry. With AutoFlow's cutting-edge OCR technology, extracted data from select slips are imported directly into the T1 return in *Taxprep*.
- CCH Scan* with AutoFlow and Remote Validation Service. With AutoFlow implemented, you can outsource validation of OCR-extracted data for some returns to the CCH processing centre.

Put *CCH Scan* in your practice and watch your costs go down as your productivity and revenue go all the way up.

Talk to your CCH Account Manager today about how you can enhance your tax returns workflow with *CCH Scan*.

To learn more, sign up for a FREE live *CCH Scan* demo webinar by visiting www.cch.ca/scan.

S.N. Roy gets 'extra set of hands' with Remote Validation Service

S.N. Roy & Associates in Moose Jaw, Saskatchewan has been enjoying the many benefits of *CCH Scan* since 2006.

In fact, it has processed about **900 returns using *CCH Scan's* AutoFlow** optical character recognition technology. But in April 2010, S.N. Roy fell behind schedule because too many slips were coming in late. So it decided to try **Remote Validation Service**, an add-on service available to *CCH Scan* users. **"The turnaround time was excellent,"** recalls Sheila Roy, a senior partner at the firm. **"We especially enjoyed submitting files on the Saturday and receiving them back two hours later."** S.N. Roy in the end used Remote Validation Service to process two-thirds of its total returns for the 2010 tax season. "Remote Validation Service was like an extra set of hands," says Ms. Roy.

"Our preparers were able to function in review mode rather than entry mode and do so with confidence knowing data was 100 per cent accurate."



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