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How well your firm handles gathering and organizing documents as they flow into the firm impacts workflow and efficiency throughout an engagement, but it does not stop there. How well documents are handled when they are gathered and scanned, along with the methodology and policies you use, will impact workflow and efficiency for the entire lifecycle of a document until it reaches its retention period and you chose to purge it from the system.

Two categories of scanning

It is useful to separate scanning in accounting firms into two categories. One type of scanning includes individual documents or a small number of miscellaneous documents. The other type of scanning is higher volume, and depending upon firm size, more production oriented.

Regardless of which type of scanning you are doing, scanners should be directly connected to your computer and deliver documents to you in your document management system (DMS), or they should be multifunction devices that deliver documents directly to you within the DMS. As paper is scanned, your system should automatically be applying optical character recognition (OCR) so the newly created scanned documents will always have searchable content.

Keep it simple, efficient and cost-effective

When scanning individual files, it should be simple enough that anyone could scan a document and put it where it needs to go. From scanner to screen should take a

matter of seconds. Once on screen, putting a document where it belongs should not

returning to where you started, and then having that lower rate staff member do what you could have done.

Dealing with higher-volume scanning

Higher volume scanning and forms recognition is handled similarly with a few differences. As a general rule, the larger a firm is, the more this function is delegated and centralized. The equipment is the same. The way the scanned information lands on screen is the same. What is different is how a person feeds a large volume of documents into a scanner, and the use of forms recognition to expedite naming and filing. A good system will allow you to maximize the use of separator sheets, auto recognition, and the addition of a potentially unrecognized document to the system so that particular document is recognized the next time one is received. As with any business system, the higher quality and better organized your input is, the faster it can be turned into meaningful on-screen information.

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Chuck Wilson, Senior Client Solution Specialist with Doc.It, provides implementation consulting and training services to clients. Prior to joining Doc.It, Chuck worked for a public accounting firm managing all systems implementation, product selection and migration, disaster recovery planning and process excellence initiatives. Chuck joined Doc.It in 2006, and has personally assisted over 150 firms with document management implementation and training initiatives.

Chuck's experience working in the trenches of a successful and growing accounting firm gives him the aptitude to readily understand the challenges firms face as they go about their daily work. Chuck is instrumental in helping firms as they implement document management and workflow software and establish processes resulting in firm-wide productivity gains.

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