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It was not so long ago that the administrative work accompanying the annual tax preparation process was arduous at best. Most tax accountants except the very youngest among us can remember the file cabinets, the piles of papers and workpaper folders, the photocopying, the calls and emails to clients chasing down missing documents – all of which was necessary and none of which was part of the skill set necessary to prepare and complete tax returns.

“Back then we were working with paper documents, importing tax returns by hand, through the computer, keeping our time on a separate time and billing program. We had a network server that was our file server where we would store client documents, we delivered tax returns by mail or clients picked up the paper returns, we punched invoices into a receivables program manually. So very time consuming, very labor intensive, also subject to human error.” These are the reminiscences of Joe Sachetta, partner at Boston area [Sachetta & Callahan](#), CPAs and wealth advisors.

Sachetta & Callahan has used CCH tax and accounting products for over 20 years, starting with the foundation version, then moving to the global platform. “It’s been a gradual change,” said Sachetta, explaining that the impetus to move to the cloud-

based CCH Axcess was a combination of “the need to move to a more secure

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Much of the work done at Sachetta & Callahan is related to wealth management, which means that typically there is a lot of detailed capital gain information that needs to be included in the tax returns. “Clients who use an outside broker might have hundreds and hundreds of transactions each year. With Axcess, you can scan in brokerage statements, the information is input into an Excel spreadsheet, and, with a couple of clicks, the information is input into the tax return. Where we used to have four to five people entering numbers into a return, now we use none of those people. Anything scanned in on government forms has already been pulled into the tax return.”

In a practice that prepares approximately 2,000 tax returns a year, the savings in manpower are enormous and measurable. Scaling up the practice becomes feasible, whereas before, adding additional work meant adding a commensurate number of employees. “You can leverage technology with the volume and drive the cost down. If you're talking about human capital or labor, there's no way to leverage that. If you go from preparing 100 returns to 1,000 returns without the technology, you'll probably need 10 times as much manpower,” said Sachetta.

The transition process from CCH Global to Axcess took about two to three months and Sachetta & Callahan took exceptional care to make certain all data transferred properly. “We had to migrate data from the old databases into a new program, double check that things came over correctly. Sometimes things came over properly, some things got misplaced,” said Sachetta. The firm made the change in the summer so that everything was in place for tax season. “You don't want to be making these transitions during tax season.”

Training on the new system was fairly intuitive, and many of the firm members attend the CCH User Conference each year where they can get pointers on software features. For training new hires, Sachetta & Callahan will have the new hire work on a new client. “We'll ask them to input the client's prior year return into the program.

That allows us to get the return in to the system and we can roll it forward for next

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print out the file authorization sheets, and they sign them.” Sachetta & Callahan waits briefly before efilings. “Every now and then somebody will call us on the ride home or the next morning, realizing they forgot to tell us something.”

Once there's a green light, the administrative staff takes over, efilings the return, printing a paper client copy if that has been requested, putting a copy of the return in the client's cloud folder. “With a click of a button, an invoice is generated, it's posted into the CCH practice management module and into accounts receivable. We've done away with all of our file cabinets,” said Sachetta. “There are no paper files at all.”

There's no looking back for Sachetta & Callahan. Old processes, keeping track of documents, extra staff taking care of administrative duties and paperwork: “There were so many things you needed to do from a compliance point of view,” said Sachetta. Axxess has helped Sachetta & Callahan turn the corner from concentrating on back-end compliance work to offering true client service. “The client is only looking for a well-prepared tax return.”

Accounting • Technology

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