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If you're thinking about taking your accounting department paperless this 2018 tax season, these tips will turn a potentially negative experience into a positive one.

## 5. Know That “Paperless” Only Describes Half the Benefits

There are many ways to go paperless before tax season, but not all are created equal. The best paperless strategies are backed by software solutions that automate, simplify, and securitize processes traditionally completed with paper, and this is where the resulting efficiencies and cost reductions can be tracked.

For instance, going paperless would serve little purpose if all one used was a scanner

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There's a widespread belief in the accounting community that going paperless can cost over \$20,000. However, after implementation fees of a document management solution and a monthly subscription fee of roughly \$50 per month to use the software, the return on investment begins quickly if the system is leveraged and embedded across existing business processes.

One of the most common mistakes accountants and CPAs make when going paperless is forgetting to leverage the features of a document management solution. This is easily avoidable if selecting a system as intuitive as possible, and therefore easy to remember to utilize and embed into an existing process architecture.

### **3. Choose a Software Vendor That Can Automate and Encrypt Your Entire Process**

To succeed in the 2018 tax season, most accountants will need the following features in a document management solution to automate and encrypt processes deeply embedded in their existing, paper-based routines:

#### ***Templates***

When adding a new client to file structures, accounting must manually create the folder, store it, and tag it. Templates mean that instead of copying, pasting, and moving file and folder and drawer structures, accountants can replicate them in different places, automating a file and folder creation process that would otherwise be repetitive and time-consuming.

#### ***Zonal OCR***

**Zonal OCR for accountants** automates the scanning and information management portion of scanned documents. It also enables throughput continuity and simplifies

using a document management solution over the long-term, automatically routing

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Never having to remove items from the portal, but rather letting clients access documents via the portal, and 2) impressed clients who feel safe sharing their information. Additionally, some accountants even charge their clients to use these portals and collect extra income because of their ease of use and security.

## 2. Head for the Cloud to Integrate with Solutions You Already Use

The cloud is the future of all software interdependence and connection, so learning to rely on it sooner rather than later will remove any need to convert data from an on premises technology to the cloud, and also enable longevity to the integrations with software accountants already use, such as Lacerte from Intuit or QuickBooks.

### 1. You Don't Need to Rush to Get It Done

Going paperless with even the best software should never feel like a rushed, confusing process. Many accountants can complete the process within the span of several weeks without shutting down operations, but still, others choose to opt in for a "phased" implementation, merely scanning a document into their document management solution of choice whenever it's touched. Neither option is better than the other, but a matter of preference.

If accountants remember these tips to prepare for the 2018 tax season, they are bound to succeed in their paperless endeavors.

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Jesse Wood is the CEO of [document management software vendor, eFileCabinet](#). Founded in 2001, eFileCabinet, Inc. began as a cutting-edge tool to digitally store records in accounting firms. As it grew in popularity, eFileCabinet developed into a full-fledged electronic document management solution designed to help

organizations automate redundant processes, ensure security, and solve common

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