

Case Study

Tax season arrives bringing in thousands of pieces of paper

Harry Sealfon, CPA goes paperless with **Kodak** Scanners

Each year as tax season arrives, Sealfon is visited by hundreds of clients who bring him their yearly records. Scanners from Kodak Alaris enable Sealfon to easily manage and scan his clients' files, creating an almost paperless process.

Situation

Harry Sealfon had managed over 350 clients by himself. Eventually, document storage became a problem, and copying each specific client file became a nuisance. He needed a solution to scan documents into his computer to save time and storage space.

Objective

Find a digital solution that would almost eliminate paper records, copying and storage issues while allowing immediate access with secure recordkeeping.

Solution

The **Kodak** i30 Scanner with associated software.*

Results

"I'd say my level of satisfaction is 95% or higher. It's reliable, there are no technical issues, the setup and basic operation was easy. It works like a charm." Harry Sealfon, President and Owner, Harry I. Sealfon, CPA, PC

A significant advantage

Harry Sealfon is big on cost/benefit analysis. "I naturally think like an accountant," he notes. So when he began looking into a solution to achieve his goal of an (almost) paperless office, his searches on the Internet and reading of accounting journal articles led him to find a low-volume production scanner that offered "the most bang for the buck." After extensive research and price prospecting, he ordered a **Kodak** i30 Scanner online.

"I looked at scanners from other manufacturers, but Kodak Alaris is a hometown company and the more I read, I realized that the **Kodak** i30 Scanner seemed like an ideal fit for what I wanted to achieve," Sealfon says. After purchasing the scanner, Sealfon quickly put it to work, utilizing basic functions to achieve his primary objective. "I wanted to have a client come in, sit down, hand me their input, put it in my scanner, chat with them for a couple minutes, and hand their documents back to them," he says. "Clients are quite impressed when I explain what I'm doing and surprised to get their materials back almost immediately."

Aside from delighting his clients, Sealfon's deeper motive was to have all data electronically stored in client-named folders, and he quickly achieved this. "Now, with over 350 clients, I can quickly scroll to their name and find the file or form I'm looking for," he says. Along with far easier access, he says the other advantages are significant, including greatly reduced paper use, reduced storage space required and associated time required to access files, speed of scanning and returns processing, and the ability to find and send copies of requested documents to clients quickly.

Regarding this last point, Sealfon outlines his old process versus the new. "Let's say a client called and wanted a copy of their W-2 from a previous year. I'd have to go to the storage room and find the right cabinet and drawer to locate the document, come back and make a copy, address an envelope and mail it, and then file the document again. And if they wanted an electronic copy, I'd have to scan it on my flatbed scanner and go through all that."

Today, the CPA finds the file, prints it if desired, or e-mails a copy directly to the client. "Multiply the amount of time saved by multiple requests and you can see how the benefits add up," claims Sealfon. As Sealfon files most returns with the IRS via their electronic e-file system, the advantages multiply.

Based in a suburb of Rochester, NY, Sealfon serves over 350 clients, mostly individuals, with some businesses in his mix. To date, he's scanned over 11,800 documents with his **Kodak i30 Scanner** and is extremely impressed with the speed and reliability. "I believe it's rated at 25 images per minute, and for my volume and the way that I use it, that's more than enough. It zips through stuff and there is rarely a misfeed. I can place



a client's documents in the feeder and just let it go." To protect his data, Sealfon uses a CD writer with regularly scheduled backups.

As a next step, Sealfon is looking to explore **Kodak Capture Software Lite*** and the other programs bundled with the scanner to add even more functionality, including expanded indexing and additional search capabilities.

In retrospect, Sealfon does have one minor regret. "I wish I'd purchased the **Kodak i40 Scanner**, which does duplex imaging. Many of the mutual fund companies and brokerages are now printing statements on two sides. This would have made the capture a slightly quicker process."

Improving document quality

Sealfon appreciates the automatic image-quality features of his **Kodak i30 Scanner** as even faint documents are enhanced for improved legibility. "I've scanned documents of low contrast on my flatbed and found them unusable. If I let the i30 Scanner do the scan, the improvement in quality is remarkable,"

he notes. The **Kodak i30 Scanner** comes with built-in Perfect Page Scanning with iThresholding, an array of features originally found on high-volume scanners from Kodak Alaris. This advanced image processing allows users to get exceptional images consistently at full speed, even from poor-quality documents. Along with automatic image cropping and straightening, rescans are virtually eliminated, further boosting productivity.

"I'd say my level of satisfaction is 95% or higher. It's reliable, there are no technical issues, the setup and basic operation was easy. It works like a charm," Sealfon says. "I've even been able to use this digital capability as a marketing tool. Let's say someone calls and wants a copy of a return. While I'm on the phone with them, I find and e-mail the file to them. Then I say it's on the way, while we're still talking on the phone. It's a very easy way to impress a client, maintain and increase their level of satisfaction, and it creates good word-of-mouth advertising for my business."

Want to learn more?

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* The **Kodak i30 Scanner** has been replaced by the **Kodak i940, i2420/i2620/i2820 Scanners**. **Kodak Capture Software Lite** has been replaced by **Kodak Capture Software Limited Edition**.

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