

How Has Armour Vickerman, PLLC Reduced Office Expenses and Saved Countless Hours with CCH® ProSystem fx® Solutions?

Armour Vickerman, PLLC is a firm that provides clients with a full range of accounting services for individuals and small businesses. Founding partners Sam Armour, CPA, CVA, and Sue Vickerman, CPA, work with 1,100 clients, preparing individual and business income taxes, providing audit representation and offering payroll and bookkeeping services and estate planning.

Armour Vickerman uses CCH® ProSystem fx® Tax paired with CCH® ProSystem fx® Engagement, CCH® ProSystem fx® Document, CCH® ProSystem fx® Portal and CCH® ProSystem fx® Scan with AutoFlow Technology to streamline their workflow, store digital files and increase the day-to-day productivity for the 10-member firm. They also integrate these solutions with CCH® ProSystem fx® Practice Management to track time and billing, maintain client records and produce internal reports.

The Decision to Go “Paperless”

When Vickerman joined Armour’s practice as a partner, they began talking about making the transition from paper files to a paperless workflow. Both believed it would make the firm more competitive. Armour also believed it would save the firm money.

“We both came from a regional-national environment, and both of those firms were heading that direction. We just felt that going paperless would give us that competitive edge, plus it’s the way the industry is going. All of the big four are paperless. The national firms are paperless. It’s just a matter of time before that trickles down to the local firms.”

— Sue Vickerman



“We have hundreds of boxes of client paperwork. Looking long term, we didn’t want to spend thousands of dollars in storage fees over the life of our firm.”

— Sam Armour

The term “paperless” means different things to different people. Some firms use a paperless system to archive records after the income tax preparation process is complete. But Armour and Vickerman wanted to be paperless throughout the tax and audit workflow in order to increase efficiency.

“There are different degrees of going paperless that make sense for one firm over another. We wanted an environment that begins when the paperwork comes in the door, so that when we’re doing the work, it’s paperless.”

— Sam Armour

Armour Vickerman, PLLC Key Data:

- Founded in 2004
- Headquartered in Tumwater, WA
- 10 employees, including 6 CPAs
- The firm offers services in Tax, Audit, Representation, Payroll, Reporting, Bookkeeping, Financial Statements, Business Valuation, Estate Planning and Exit Planning

To accomplish this goal, Vickerman and Armour created a “champion team” made up of administrative staff and CPAs, with Vickerman taking the lead. “I championed the team because I was familiar with Wolters Kluwer’s paperless solutions after attending several CCH Connections: User Conferences,” she explains. Their decision to go with Wolters Kluwer solutions was based on the seamless integration they could achieve with the systems they were already using.

“We asked an outside IT consultancy for help, and they recommended that we use the same suite of products so the integration would be smooth. That was a big reason why we decided to go with Wolters Kluwer.”

— Sue Vickerman

Paperless Tax Preparation Workflows

Armour Vickerman has established a personalized scanning and workflow process so that the right information reaches the right people when they need it. The administrative staff starts by logging data into the system, scanning documents, and then pushing a button to activate CCH ProSystem fx Scan with Autoflow Technology, processing and extracting data from client source documents and importing the information into CCH ProSystem fx Tax.

“Instead of our preparers entering the numbers from a scan into CCH ProSystem fx Tax, those numbers will already be in there. So they really go into a tax review at that point to make sure that numbers reconcile. We no longer have a paper file. We have no paper at all for the tax prep.”

— Sue Vickerman

“The digital files are stored in CCH ProSystem fx Document, a cloud solution for file storage and retrieval. Anybody in the firm has quick and easy access to any document at anytime. We can also access files when we’re out of the office.”

— Sam Armour

“Another advantage to using CCH ProSystem fx Document is that Wolters Kluwer handles software updates automatically so firms don’t have to maintain their own server or worry about their software being outdated. We are technologically challenged in the office, so we need an outside IT consultant. With the Document SaaS environment, you get that technical support, which is really very good.”

— Sue Vickerman

Using CCH ProSystem fx Tax, CCH ProSystem fx Engagement, CCH ProSystem fx Scan with AutoFlow Technology, CCH ProSystem fx Document and CCH ProSystem fx Portal, Armour Vickerman was able to:

- Create an entirely paperless workflow for tax preparation.
- Reduce office expenses by 20%.
- Ensure that CPAs focus on higher value work by eliminating photocopying, scanning and data entry from their daily routines.
- Increase the security of client files while making them easier to store and share.

An Easy, Secure Way to Share Documents with Clients

CCH ProSystem fx Document combined with CCH ProSystem fx Portal makes it easy to share documents with clients instantly. Files can be effortlessly uploaded, downloaded, stored and shared in a safe and secure environment. With CCH ProSystem fx Portal, Armour Vickerman can receive client data and deliver final tax returns and other requested documents to the client much more efficiently than their old paper process. Vickerman believes it’s much better than email.

“Instead of making a PDF copy for email and masking the social security numbers, we can post requested documents in the client’s portal. The clients really like that aspect. Even those who we thought weren’t as technologically savvy have found it very, very easy to use.”

— Sue Vickerman

“Our clients who use it absolutely love it. One business client posts Quickbooks® reports and documents that we can then accept from CCH ProSystem fx Portal into CCH ProSystem fx Document and put to use. It’s very convenient for our clients who are traveling, too.”

— Sam Armour

Security is always a concern for accountants, but Armour Vickerman is confident that Wolters Kluwer has the right level of security to protect their data. CCH ProSystem fx Portal is password-protected to limit access to only authorized persons. Armour thinks it's even more secure than paper. "If you've got paper files around your office, anyone can see them," he acknowledges.

Armour and Vickerman agree that implementing a paperless solution and moving document storage into the cloud was the right decision for their firm.

“We all love being paperless. We're excited to push it to the next level and get more and more clients on CCH ProSystem fx Portal so that eventually, our deliverables will be through CCH ProSystem fx Portal, and we'll be closer to our 100% paperless goal.”
— Sue Vickerman

Tips for Making the Transition to a Paperless Firm

Armour and Vickerman offer this advice to firms seeking to implement paperless solutions and workflows:

1. Create a champion team and get buy-in from the top. If the firms' leaders don't believe in paperless, the staff will keep using slower but familiar paper files.
2. Study your paper-based process. The champion team started by working with a consultant to document their paper process and identify places they could save steps.
3. Talk to other firms. Before they began evaluating solutions, Vickerman spoke to other firms — including competitors — to find out who was going paperless and how they were doing it.
4. Training is key to getting the most out of the solution. Implementing a paperless system will only benefit the firm if everyone uses the solutions to their full capacity. "If you're going to go paperless with these products, you've got to get the training that goes with it," says Vickerman.
5. Prevent CPAs from spending time scanning documents. Only partners and the administrative staff were trained on the use of CCH ProSystem fx Scan with AutoFlow Technology, so preparers would not even know how to use it.
6. Give staff multiple monitors. Everyone at Armour Vickerman already uses double monitors, and now the firm is moving to triple monitors. That way, CPAs and preparers can easily review client source documents while working on returns.
7. Persuade clients to use secure portals. The firm has to be the leader on this issue. Armour Vickerman's policy is to give clients time to adopt the system, but to be firm about it.
8. Keep learning from others' best practices. Vickerman attends the annual CCH Connections: User Conference to pick up additional training and best practices. It's a great place to learn from peers, too. "We're firm believers in not reinventing the wheel," Armour explains.

For More Information
CCHGroup.com/ProSystemTax
800-739-9998

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