

## Custom Speech USA™ Case Studies Tracking Income Tax Preparation for Accounting Firm

### Background

Accounting firm wanted to replace in-house, paper-based system of tracking tax preparation with electronic system.

### Case Study

#### Vendor/Client

Custom Speech USA™ for accounting firm in Michigan City, IN

#### Overview

This accounting firm provides personal and business income tax services. The firm uses CCH ProSystem fx Tax for tax preparation and planning, and TimeSlips for automated billing. Paper forms were used to track work completed and initially record billable hours. If additional financial information was required, a call or letter to the client was required.

The firm requested a flexible time tracking and reporting system that would integrate with its preexisting software. It envisioned a system of electronic reports that would be accessible by its staff and clients, thereby reducing phone calls and letters to clients. Interest was expressed in future integration with PDA such as a Palm Pilot, bar code tracking of tax documents, and telephone dictation for voice notes dictated by an accountant away from the office.

#### Components

- Command!™ Workstation x 16
- Command!™ Standard x 1

#### Installation

The Command!™ workflow manager, document retrieval, and time tracking software were installed. Command! Standard was installed on a single PC for use by the system administrator. The Command! system integrated with the firm's preexisting Microsoft SQL Server. Different activities were preconfigured in the Command!™ workflow by Custom Speech USA™ corresponding to the stages of income tax preparation that the accounting firm had traditionally used. Using the Command!™ reports add-in, the user, the activity start and finish times, duration, and comments regarding additional information or documents required could be reported for each tax client. This information is accessible on a local and a network or, with an user ID and password, on a standard web browser.

#### Benefits

- "Factory" preconfigured system for rapid installation and use by customer
- Electronic, web-accessible reports for time tracking and tax form completion
- Used pre-existing tax preparation and time and billing software
- Easy future integration with Palm Pilot, bar code tracking, and telephone dictation

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We teach computers how to listen®

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