SafeSend

Rehmann
Case Study

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![Rehmann — Business wisdom delivered.]

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A handful of the firm's offices began using SafeSend Returns on a trial basis leading up to the fall deadlines in 2017. After seeing the ecstatic response of their people using the software, they adopted SafeSend Returns as the default method for delivering returns and collecting signed Forms 8879. "If we have an email for the client, it's going out that way," says Cindy Redmond, a tax strategic business analyst at Rehmann.

Redmond says the firm follows the best practice of keeping partners out of the process. Signers review returns before they're assembled. From assembly, returns are sent straight to the clients rather than going back to the signer.

"The signers love it," Redmond says. "Once they review a return, it's off their desk and out of their mind."

Rehmann's professional staff are fans as well. cPaperless claims that clients of SafeSend Returns have reported that it takes, on average, four to five minutes to assemble and deliver a tax return through SafeSend Returns and Redmond says those numbers are consistent with the results Rehmann's professional support staff have realized. Right off the bat, they were able to reduce the time it takes to process a return to seven to ten minutes rather than the 25 to 30 minutes it usually took. "And that's when we just started using it," Redmond says. "Now that our team is used to it, they're processing returns within five minutes."

In the firm's southeast region, hours for their professional support are down 1,200 hours for the year. While those results could be the result of a number of things – the firm underwent a process improvement project shortly before implementing SafeSend Returns – Redmond acknowledges SafeSend Returns is a valuable time saver. "Our professional support team has time available to do other things," she says. One of the tasks they've been able to leverage their support staff for is organizing client documents when they come in – something that used to be done by professionals.

While Rehmann hasn't done an official ROI calculation, she notes that just looking at the reduction in hours – and the corresponding decrease in overtime pay – is evidence of the cost savings possible with SafeSend Returns. "For the small amount it costs to turn a return around in SafeSend Returns, we're doubling production and getting more work out the door," she says.

"Preparers are spending more time preparing rather than shuffling papers."

![SafeSend Returns logo]

It's a time-saving solution that clients like as well. Redmond has a few success stories she likes to share, including a couple who were able to sign Form 8879 on an iPad while one spouse was in the hospital. Another client had struggled to use other electronic delivery options in the past but was able to use SafeSend Returns on his own. Overall, the response from clients is that SafeSend Returns is a simple process that they like much better than paper or previous electronic delivery solutions.

The improved turnaround time for getting a signed Form 8879 is evidence of how simple it is for clients. Redmond says the average time from a client opening the email to the firm receiving the signed Form 8879 is just 16 minutes and nearly all clients return the form within 24 hours. "Some people may not sign until they get into work in the morning," Redmond says, "but we're certainly not chasing them down like we used to."

On the few occasions when the firm has encountered difficulties, the SafeSend Returns support team has been very responsive, typically resolving issues within 24 to 48 hours. Redmond says, "I feel like we're a team, not a vendor/ customer relationship."

Cindy Redmond
Tax Strategic Business Analyst, Rehmann