

How One Firm Got Hours Back During Tax Season

Greene Dorff & Associates | Tax and Accounting

For Jacquie Ashwell, Office/Project Manager at Greene Dorff & Associates, tax season intake meant the same thing every year. Print the organizer, chase clients, organize and rescan everything by hand. SmartRequestAI changed that.

Greene Dorff & Associates has prepared returns in Intuit Lacerte and run SmartVault alongside it since 2022. This past season, the firm became one of the first to add [SmartRequestAI®](#), SmartVault's feature for automating the collect stage of the tax prep workflow.

Before SmartRequestAI, the admin team printed organizers, waited on clients to scan or drop off documents, then organized and rescanned everything by hand. Many clients refused to print a 40-page document. Others didn't own a scanner.

"Our organizers were so many pages, people would say, I don't have a scanner, or I'm not printing that whole thing out," Jacquie says.

SmartRequestAI replaced the paper organizer with a digital questionnaire built from each client's prior year return, adjusting in real time based on their answers. Once a client completes it, the admin team gets back a structured set of answers and source documents in one bookmarked workbook, with no manual sorting required.

The results from year one:

- Admin team eliminated manual printing, organizing, and rescanning for clients who completed the process digitally
- Several clients completed the questionnaire the same day they received it
- Around 20 clients engaged with SmartVault for the first time
- Dashboard visibility replaced manual follow up guesswork

"It was surprising how quickly people did it," Jacquie says. "Sometimes we'd send the request out, and the same day, they'd already completed it."

Jacquie is already refining templates with the SmartVault team ahead of next tax season.

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