



## Personal Tax Return Processing For UK Accounting Firms

### The Client

One of UK's leading independent Chartered Accountants with multiple offices in London and the Home Counties providing advice and support to individuals and businesses ranging from small family enterprises to large international corporations.

### Business Needs

The client required the large volumes of tax returns of Individuals, partnership, Nonresident Corporate & trusts (SA100, SA 700, SA800, and SA900) to be processed in a cost efficient manner and accurately. Scalability and quick turnaround times were of utmost importance.

### Challenges

- Seasonal work so scalability and quick turnaround during peak periods
- Understand Tax Laws and Regulations of UK
- Ensuring accuracy of Tax returns
- Handling Tax payers' secure tax data

## Datamatics' Solution

- A dedicated team of trained staff with expertise in UK tax regulations deployed for processing and reviewing (Quality Check) the Tax Returns.
- A Manager, duly trained in a UK CA firm, was deployed for efficient processing, problem resolution and keeping team members abreast of changes in Tax Laws.
- Exhaustive checklists were set up and Tax Reconciliations provided as part of output to ensure accuracy.
- Workflow, communication protocols and feedback mechanisms were set up.
- Returns processed on client remote desktop, thus securing the confidential Tax payer data.
- Weekly status and timesheets updated to ensure transparency of work status.
- Use of Client Database Management system, to reduce admin time involved in transmitting information.

## Benefits

- Substantial cost savings as client no longer had to carry large staff round the year.
- Client could focus on Tax Planning, Client relations and other Core activities.
- Smooth and Undisturbed Flow of Work unimpacted by leaves or attrition at client end.
- Well managed peaks with quick turnaround times.

## Inputs and Deliverables

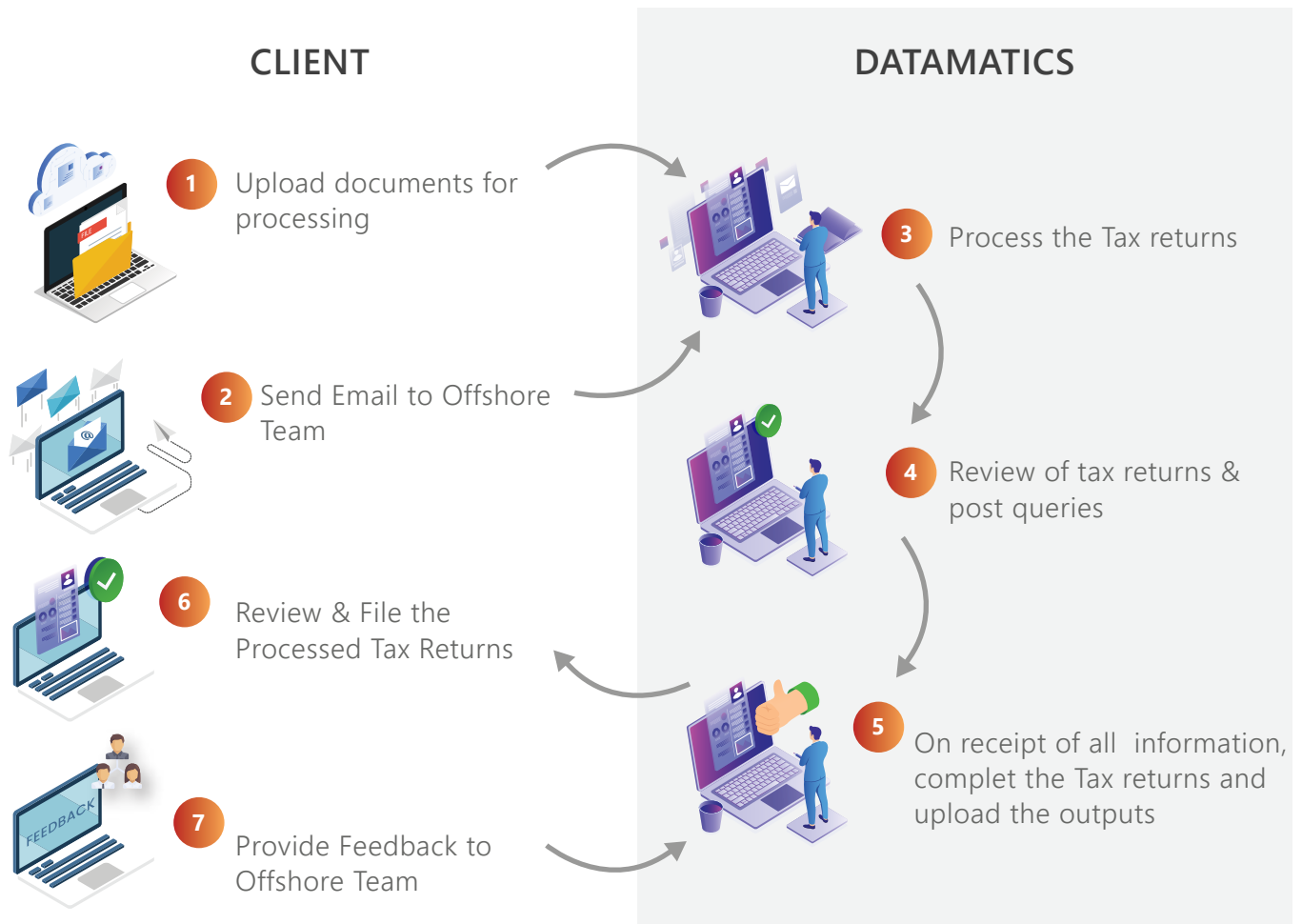
### INPUTS

- Previous years' tax returns
- Current year documents
- Payments on account details
- PAYE coding notice
- Client codes

### DELIVERABLES

- Covering Letter
- Review Notes for Managers
- Tax Liability Schedule with reconciliations
- Income Schedule
- Client Specific Checklist, if any

## The Process



## The Result

The Client was able to process on large volumes of Tax Returns year on year without expanding its staff base and was able to meet the Tax deadlines in a cost efficient manner.

For more information, contact [marketing@datamaticsbpm.com](mailto:marketing@datamaticsbpm.com)



### About Datamatics Business Solutions Limited (DBSL)

DBSL is an intelligent Business Process Management (iBPM) services provider, delivering Finance & Accounting Outsourcing, Payroll, Database Solutions & B2B Marketing, Demand Generation & Sales Acceleration, Business Research, and Contact Center Services to Fortune 1000 companies. Our focus is on driving revenue growth, operational excellence, cost efficiency & customer intimacy for global clients.

**North America:** +1-571-281-0707 | **Europe:** +44-20-3026-5330 | **APAC:** +91-22-6671-2001

[www.datamaticsbpm.com](http://www.datamaticsbpm.com)



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