

RECEPTION

OFFICE SERVICES AND DOCUMENT DELIVERY IN 2024

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Koroll & Company is open to serve your tax and accounting needs and meet your filing deadlines, both corporate and personal. For convenience and flexibility, we encourage you to utilize our alternate methods of document transmission.

How to Reach Us:

- **By Portal** – We highly recommend our secure Portal for transferring documents. It is one of the best ways to protect your sensitive information. ([link to instructions](#))
- **By Email** – If you do not have the email address of a staff member, please send your email to: info@koroll.ca - we monitor this address regularly. Remember that email is not secure. Do not send sensitive information.
- **Courier and Mail** – We are open during business hours to receive parcels. Small envelopes can be dropped in our locked mail box outside.
- **By Fax** – Send documents at any time to our fax number: 905-898-3760.
- **By Phone** – Call the main number (905-898-4231 or 416-969-8118) during office hours for immediate service. Leave a message after hours.

Office Hours and Meetings:

Our office is open 9:00 am to 5:00 pm Monday to Friday, excluding holidays.

Extended hours for tax season start Monday March 18th and end Tuesday April 30th 2024.

During this period only, the office will be open 8:30 am to 5:30 pm Monday to Friday and 9:00 am to 12 noon on Saturdays.

Face-to-face or remote meetings with accountants are by appointment only. Please schedule an appointment if you need to meet with someone.

Documents can be dropped off during office hours. If you require any other in-person services, please call ahead.

Why Go Digital?

Times are changing and we are working toward a paperless office. Viewing and storing documents electronically saves space and paper. Document retrieval is more efficient. Mail or courier can be expensive or be lost in transit. Here are some other cost and security benefits of electronic/digital documents:

- Uploading to the Portal is quick and secure – and you can save your documents there
- Our staff can work on your documents from anywhere
- Paper documents must be stored and returned to you
- Paper needs to be scanned for our records, requiring extra time and resources

We encourage you to consider electronic options and our Portal for document delivery.

Koroll & Company Portal:

To ensure electronic security, we highly recommend you utilize our Portal to transfer documents:

- Request an invitation to the Koroll & Company Portal: [Register](#)
- Setup your own personal login with Multi-factor Authentication (keep for next time)
- Scan your slips and documents ([suggestions below](#))
- Upload digital files securely using your Portal login: [Client Login](#)

Best practices to improve document handling efficiency:

- Gather your documents in one location on your device to upload in one batch
- If possible, compile lists of receipts into an Excel spread-sheet or written list.
- Drag and drop (or select) all of the documents at the same time
- Send a separate email to portal@koroll.ca when you have finished uploading
- If you receive additional information after your initial upload(s), submit promptly

Additional instructions are available in the Portal. Let us know if you have questions!

Scanning With Your Phone:

You may already have many of your documents on your computer if you received or created them electronically. And many of you have a scanner to convert paper documents. If not, you can turn your smart phone into a mini scanner! Take a picture of your document and save it as a PDF with the help of a free scanner app.

Why a PDF? Photos are very difficult to read and convert into printable documents. They significantly reduce our document handling efficiency.

Therefore, we **recommend** that you turn your smart phone into a scanner. There are several apps available that use your phone's camera to convert the pictures into readable PDF documents (Adobe Scan, Genius Scan, SwiftScan, Microsoft Lens, Apple Notes, CamScanner, etc.)

Saving or scanning your documents in batches, also increases our efficiency. If batching is not possible, try to give each document a different name (1,2,3 or a,b,c) so we can keep track.

Email Tips and Tricks:

Regular, unencrypted email is not secure. Do not send sensitive information by email.

If you choose to email documents, please send them as attachments. When they are embedded in the body of the email, it is difficult for us to process them individually. Most email programs allow you to set options for attachments.

Our preferred file format for documents is PDF. Photos and JPEG can be very difficult to read and print. They significantly reduce our document handling efficiency.

Website Resources:

Our website has lists of useful links to documents and websites that focus on your financial and tax needs. You can access this list on our website under the "Tips and Resources" heading: There are different categories to peruse including:

[Personal Tax Organizers](#)

[Financial Tools](#)

[Taxes and Compliance](#)

[Additional Resources](#)

Questions? You can call or email at any time! [How to Reach Us](#)