



A CPA Firm's Plan for Going Paperless

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tion and documents that are well organized in a format that is easy to use and navigate.

When we created our first intranet, our focus was on functionality. When it was complete, it was not fancy, but it accomplished what was intended. There are a number of inexpensive, easy to use web-publishing software programs available that can help you get started on your own company intranet – Visual Site Designer, Web Easy Professional and NetObjects Fusion, to name a few. With proper planning and implementation, it is definitely a worth-while investment.

Document Management System

Once the firm's internal documents were transitioned into a paperless environment, it was only logical to apply the same concept to our client documents. For this, we looked at several vendors who provided Document Management System (DMS) solutions. During the decision process, there were a number of factors that we knew were critical when choosing the right system for our firm, such as: ease of use; training and support; security and disaster recovery; access and reliability; customization; hosted versus non-hosted solution; hardware requirements; and cost.

We have been using our DMS for several years now

and have experienced increased efficiency, reduced paper costs, and the ability to respond to client questions with lightning speed.

Client Portal

Lastly, we asked ourselves how our clients could benefit from our efforts to become paperless. The use of a portal, a tool to share documents with clients, was the answer. Not unlike our DMS, a portal can be hosted internally, using software such as Microsoft Sharepoint, or there are numerous vendors that provide the portal software which they host on their own server. A portal can be used in a few different ways. For example, an accounting firm may upload client documents to the portal, which are then available to the client to access whenever they need to (a one-way portal). Some firms may choose to use a two-way portal, whereby clients also have the ability to uploads for the accounting firm to access.

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In the last decade, the role and use of technology in accounting firms has rapidly evolved. During this time, there has been a growing need to improve efficiency and communications. Employees needed to be able to share and access information right from their desks. At the same time, clients wanted to be able to access their own information, including tax returns and financial reports. Here are some of our firm's experiences in implementing and using new technologies to meet the needs of employees and clients.

Intranet

The first stage in our transition to a paperless office was the creation of our firm intranet. An intranet is a private computer network that uses Internet protocol technology to securely share any part of an organization's information. We often refer to our intranet as our "internal web site." It is designed to share informa-