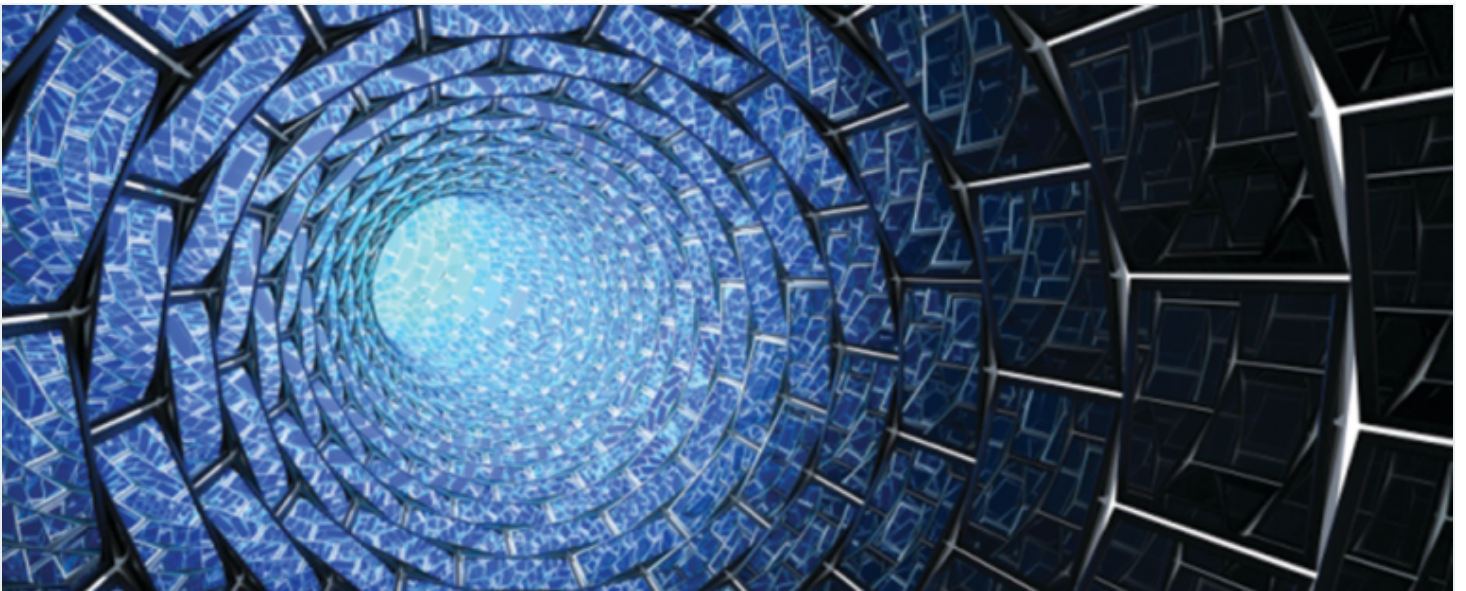


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simply email the signed return. Wouldn't it be great to have a repository of...

Mary Girsch-Bock • Oct. 20, 2017



As large accounting firms continue to adapt the use of client portals, it's estimated that the number of small and mid-sized firms using portals will continue to rise as well.

A paper-driven industry, there is no shortage of documents that need to be shared between accountants and their clients. And with more stringent confidentiality requirements in place in the accounting industry, smaller firms in particular can quickly become overwhelmed with the amount of paperwork, including work papers, completed tax returns, bank statements, and other data that need to be shared between the two offices. Clients don't have the time to gather up their paperwork and take it to their accountant's office, and smaller CPA firms in particular often lack available personnel to make copies of those documents and file them away to ensure their safety, and that they remain confidential.

Enter the portal. While portal functions can vary between a simple vehicle designed

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another method.

Wouldn't it be great to simply retrieve client documents in the portal, process their tax returns, upload the return to the portal for the client to access and sign, and simply efile the signed return? Wouldn't it be great to have a repository of files that are easily accessible to clients, and in some cases, client employees? And wouldn't it be great if you didn't have to worry if the documents were too large, or that they were vulnerable to security breaches if sent via email?

If you're still undecided about using a portal in your firm, consider these benefits:

- Portals can effectively increase productivity at your firm. While the client may experience the benefits of easy access to confidential documents, firm employees will reap some of those benefits as well including reduced or eliminated need to copy documents, erroneous or untimely mailings by an overworked staff, and the ability of colleagues to access documents via the portal as well. No more lost work papers, no more missing receipts, no more misfiled returns. Who doesn't need more time? A client portal, when implemented properly can give your firm and your employees more time.
- An improved client relationship. We all want things immediately, and your clients are no different. Today, nobody wants to wait. They want to be able to log onto their laptop or their smartphone and get what they want when they want it. Do you suppose your client would be happier coming into the office to sign a return or would the client rather access it online, take a minute to download it, sign it, and quickly upload it back to the portal? Today we often equate speed with efficiency and effectiveness. It's likely your client will do so as well.
- Security is more important today than ever before. No one wants to expose sensitive financial data or risk identity theft or worse if that information gets into

the wrong hands. A secure, encrypted portal provides accountants with a safe,

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- [CCH Axcess Portal](#)
- [Citrix Share File](#)
- [SmartVault](#)
- [Thomson Reuters NetClient CS](#)

We've also included a handy chart that displays some of the more important features you may be looking for when searching for a client portal. Conveniently, all of the products reviewed offer a free trial, so if you're interested, you can just go to the vendor website and download a demo version to try out.

Before looking, you may want to decide what features you're looking for in a portal. Do you just want to share documents, or do you want a program that will manage those documents as well? Do you want a portal that's part of your tax preparation program for easy integration? Do you want the portal to integrate with QuickBooks or another financial software product? By answering those questions, your search will be better focused, and likely a lot quicker.

No longer for large firms only, client portals are the organizational tool that even the smallest accounting firm can utilize to their benefit and to their clients' benefit as well.

Firm Management

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