

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Firm Profile:

Wilson Morgan LLP – Irvine, CA

www.wilsonmorgancpas.com

Contact – Mark Solone, Tax Manager

Wilson Morgan is a traditional CPA firm offering a mix of assurance and tax services. The firm has 11 partners and a total staff of 45 working in a single office location. They are in their sixth year of using GoFileRoom. Other applications the firm uses include: Lacerte and GoSystems for tax preparation, QuickBooks and CCH ProFx Engagement for assurance engagements. This mix of vendor solutions makes GoFileRoom a good option for DMS due to its ability to be integrated with various vendor solutions.

[Click here for the May 2012 review of GoFileRoom.](#)

Scanning Model

The firm has used a mix of scanning approaches, but for the most part they have used back end scanning, with some mid process scanning. At one point they tried to implement a front end scanning model but decided to abandon that early on. In the future they intend to transition back to a front end scanning model. Everyone is responsible for doing their own scanning at this point. Ultimately they want to move towards a centralized scanning operation with a full time scanner. They currently share a Fujitsu scanner. Review notes are tracked in FirmFlow and document annotations are made in Adobe Acrobat.

Benefits Achieved

- Better control of engagements by using the FirmFlow workflow application

- Able to retrieve documents on demand

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

- “For all of us old timers, we have made the switch to online. Not the same as paper.” Overall benefits outweigh not having the paper.
- It is important to have good people to help you establish best practices. One size does not fit all.
- Commitment is important.
- Anytime, anywhere access makes for much better client service.

Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved