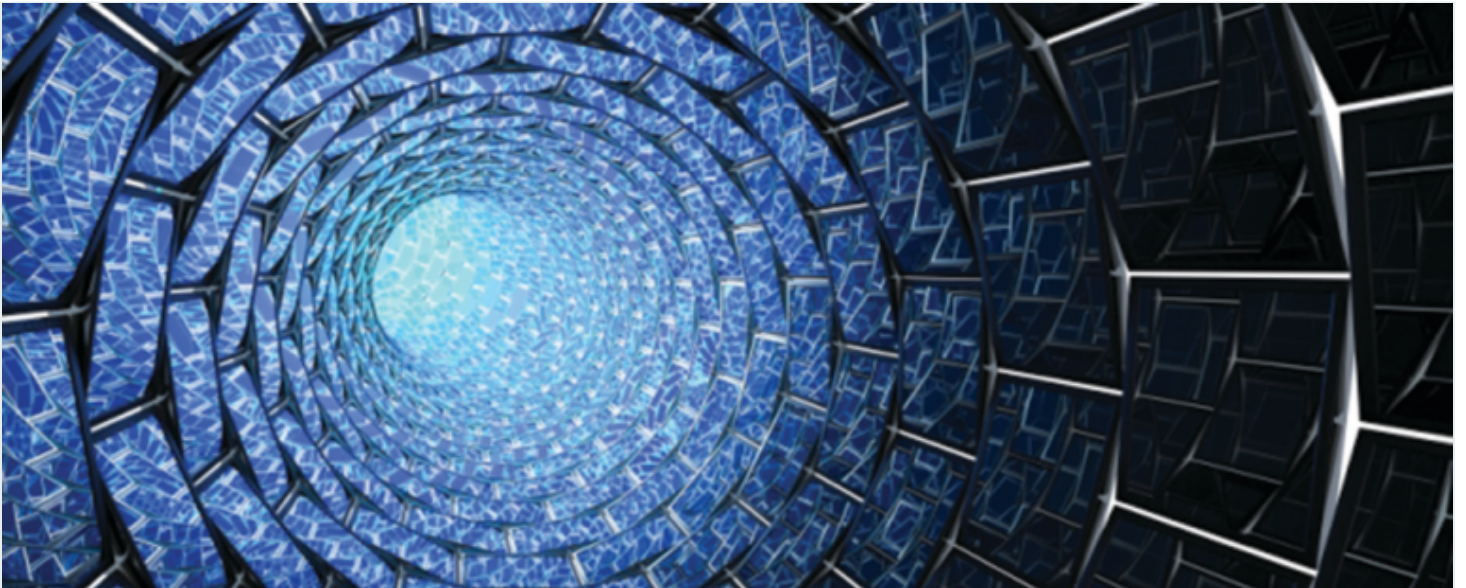


Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

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

who have not yet adopted this technology will get onboard in the next 12 to 24 months, driving the 75 percent up closer to a 90 percent adoption rate in the profession.

Aug. 15, 2016



According to the 3rd Annual Accounting Firm Operations and Technology Survey, Web portal use among accounting, tax and bookkeeping professionals has grown significantly, jumping from 52 percent in 2014 to over 75 percent today.

With the exchange of digital documents and security concerns on the rise, those who have not yet adopted this technology will get onboard in the next 12 to 24 months, driving the 75 percent up closer to a 90 percent adoption rate in the profession.

Clients expect information be available when they need it, regardless of where they are and with no regard for your firm's digital capabilities. To meet those demands and most importantly, to deliver or exchange documents in a secure manner, accountants and tax professionals have caught on to the value of Web portals. For

those who have not yet adopted Web portal technology, regular email will not

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

retention period set. When posting financial statements or tax returns in the client's Web portal, you might set retention timeline of three to four years, ensuring when files are needed into the future, they can be easily accessed by the client or firm.

Once a Web portal is set up, one of the few places where firm's run into trouble is when they do not allow the client to manage their own password. If clients are having trouble with login, giving them the ability to change their password helps to ensure they are not calling the accountant for an administrative task such as password help.

Required features of Web portals

There are several required features when shopping for Web portal technology. Investigate Web portal technology to ensure it has the following features:

- Usage of the Web portal needs to be simple. Clients need to easily be able to upload and download documents or they will not use it.
- There needs to be access to multiple entities from one login. (i.e. individual, corporation, their trust funds.)
- The accountant or tax professional must have the ability to assign different levels of access to owners and employees of the client. For example, an owner may have access to their own personal records, the company and trust fund records where as the employees may only have access to the company's records.
- Auto-notification sent to the accounting firm or the client when a document is posted by the other party.

###

Don Emery, CPA, CA is [Doc.It's](#) Director of Client Solutions. Doc.It provides [document management, workflow and document storage software](#) for accounting firms. Don leads the North America business development team. He provides

implementation consulting services to clients and assists clients with various issues.

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

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