highlight this progress in workflow management and client collaboration, with this year's winners all offering cloud-based solutions that enhance firm operations.

Isaac M. O'Bannon • Jun. 07, 2017

As cloud-based technologies continue to become prevalent in professional accounting firms, new and enhanced methods of collaboration, internally and with clients, are emerging. These tools are allowing firms to better management

workflows, and to be more productive and more secure, while engaging with clients

The Innovation Awards debuted in 2004, serving as a spotlight to honor new or recently enhanced technologies that benefit tax and accounting professionals and their clients through improved workflow, increased accessibility, enhanced collaboration, or other means.

"We've crossed the threshold of accounting firms and their clients knowing that they need to embrace new technologies. Now the questions are around which technologies provide the best solutions," said *CPA Practice Advisor* Editor-in-Chief Gail Perry, CPA. "Each year we have the opportunity to examine and test new and improved products. It is our hope that these awards provide some guidance and insight into new technologies that are available to make the work-lives of accountants and their clients better, more efficient, and more successful." Perry also manages a tax practice and is the author of more than 30 books, including *Mint.com for Dummies*, and *Idiot's Guide to Introductory Accounting*.

2017 Innovation Award Winners

ADP Accountant Connect

Accountant Connect is a free and easy-to-use dashboard with single sign-on access to RUN Powered by ADP client payroll reports, tax forms and complimentary essential practice management tools. Accountants can save valuable time with super-fast, client-authorized access to multi-client payroll information, reporting and tax forms. And, they can easily request access to existing RUN clients by sending an invitation to them right from their dashboard.
Accountant Connect users also get free access to best-of-breed practice management resources that can help them save money by running their practices more efficiently.

Resources include the Wolters Kluwer CCH Resource Library with online access to

Advantage Audit series of industry-specific standards-based programs and planning documents.

AuditFile's secure audit automation solution combined with Wiley Advantage Audit's trusted series of audit guides gives practitioners all the tools needed to perform efficient, quality engagements profitably, including real-time audit progress tracking mapped to the chosen audit program through easy-to-read dashboards and real-time notifications; Industry-specific modules with risk-based planning tools, audit program, and completed materials for a sample company, including sample client letters; Integrated workflow linking planning, programs, workpapers, and the trial balance in one complete solution; and automated planning tools for key areas such as risk management, materiality, internal controls, and ratio analysis, that flow through to applicable program areas.

cPaperless SafeSend Returns – Business Returns

SafeSend Returns is a unique E-Signature solution. It is the only all-inclusive electronic system that automates and organizes tax return assembly, collation, K1 distribution, Voucher / ES tracking. payments and much more... The cloud-based application saves time and streamlines internal office workflow by increasing staff productivity and reducing piles of paperwork. Clients love SafeSend Returns ease-of-use. The clear, logical delivery of forms 1040, 1120, 1120S and 1065, allows tax and accounting firms to process, review, approve, and deliver tax returns in less than four minutes.

cPaperless LLC won a 2016 Innovation Award for SafeSend Returns (1040s) last year. This year SafeSend Returns – Business Returns is commercially available (K1 Distribution, 1065s, 1120, 1120s).

Expensify

Expensify is an easy sell for CPAs to accounting departments because we build features that work equally well for solo-preneurs to enterprise companies, in the Fortune 500. Expensify is thoughtfully structured product and only exposes as much complexity as the end user wants/needs without stifling functionality. Integrations are built with user efficiency and productivity in mind; by utilizing automation within the product, repetitive work and data entry is eliminated.

Intuit ProConnect Tax Online & QuickBooks Online Accountant

During tax season, accounting professionals spend about five hours per business client analyzing their books and performing "clean up tasks" to prepare those books for a tax return. Intuit integrated ProConnect Tax Online and QuickBooks Online Accountant to simplify the workflow and significantly save time by creating one place for bookkeeping, taxes and practice management.

This means a single login to access accounting and tax clients' data from one client list, view e-file status notifications, and invoice accounting and tax clients from QuickBooks Online Accountant. The system also auto-populates information from a client's QuickBooks Online file into a tax return using ProConnect Tax Online, which reduces errors and saves time. With QuickBooks Online Trial Balance, accounting professionals can view year-over-year variance to help prioritize which returns to review first. The system also works together with Link, a free client portal, that allows tax preparers to easily gather tax information and connect with clients.

Innovation Award Finalists

Bill.com Android App

what staff is working on. Users can prioritize and delegate tasks, set standard task processes, and turn email into checklists. The system also maintains a communication audit trail. New enhancements include workflow visualization, workflow customization, communications management, email management, accounting professional specific CRM, project management and most recently, client management.

SurePrep TaxCaddy

TaxCaddy eliminates the paper organizer and streamlines the entire 1040 process for both the taxpayer and CPA. Throughout the year, taxpayers can use the TaxCaddy mobile phone app to photoscan and upload paper documents like property tax notices and vehicle registration receipts so they're available to the CPA at tax time.

Thomson Reuters Checkpoint Marketing Social Media Solutions

Checkpoint Marketing Social Media Solutions helps accounting firms develop and maintain a robust social media presence by providing a market-leading social media management platform, relevant content with imagery, on-going training, and metrics to analyze results. Solutions include: Social Media Manager, Federal Tax Posts, Briefs, and Infographics & Fun Facts.

Xero Report Templates

Xero's Report Templates is a groundbreaking report tool that reduces the amount of time accountants spend on client reporting, in many cases by up to 60%. With Report Templates, accountants can create beautiful, customized reports (or "packs" of reports) that can be used across any or all of their clients. With this tool, Xero

Partners are able to deliver amazing reports in far less time all while ensuring firm-

Avalara CertCapture/CertExpress

BNA Corporate Tax Analyzer

BNA Fixed Assets Web

C9 Portal from Cloudnine Realtime

CashSage from Sageworks Inc.

CCH Axcess Workstream from Wolters Kluwer

CCH ProSystem *fx* for Small Firms from Wolters Kluwer

FinancialForce Financial Management

FloQast Close Management Solutions

Intacct Contract and Revenue Management

Intuit Practice Management

Invoice Sherpa

MagicBot from SlickPie

MyFirmsApp

Scalus from HireAthena

SmartVault Batch Email & Workflow

TaxBuzz MatchMe from ClientWhys

TeamMate+ from Wolters Kluwer

TSheets Embedded Within QuickBooks Online

The winners of the *CPA Practice Advisor* Tax and Accounting Technology Innovation Awards are selected from nominated products by our editorial board and awards committee, which include thought leaders and professionals engaged in various practice specialties across the country. CPA Practice Advisor's digital and print publications offer independent practice management resources and technology information for tax and accounting professionals in public practice. www.CPAPracticeAdvisor.com. The nomination period for the 2018 Innovation Awards will open in February 2018.

Accounting • Auditing • Technology