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*From the Sept. 2008 Feature on [Scan/Fill/Populate Systems](#)*

FileCabinet CS is part of the Thomson Reuters CS Professional Suite. Initially designed as a paperless document storage system that houses scanned client documents

as images along with digital document files in a basic folder-based format, FileCabinet CS has evolved over the past few years to include various organization and management tools, including the ability to add annotations to documents, track histories, integration of e-mail and fax functions, as well as reporting and analysis features. Thomson Reuters also offers GoFileRoom ES, a more robust document management system that provides digital workpaper output.

The most recent additions to FileCabinet CS have focused on workpaper organization

and the addition of optical character recognition (OCR) capabilities that enable automated population of client 1040 returns processed using the UltraTax CS professional preparation system. This year, Thomson Reuters debuted the optional Source Document module, which offers form recognition, extraction of form data and the ability to integrate with the tax package. This new module is specifically geared toward use of the automatic population feature, since it does not result in compiled, organized and bookmarked PDF or other advanced digital workpaper output, but instead stores the data in a client folder as individual items.

While FileCabinet CS is generally locally installed (although it can be remotely hosted), the Source Document module is a web-based feature through which users scan documents and securely transmit them to the Thomson Reuters Data Center for OCR processing, data extraction and page naming. When returned to the user, the extracted tax data can be reviewed (best done with a dual monitor), edited

using the UltraTax CS Source Data Entry utility if necessary, and then imported

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populate function, which routes data to appropriate entry fields.

Since the program is web-based instead of locally hosted, it offers the advantage of being able to learn form formats and other information (not client data), which enables it to operate increasingly more efficiently and quickly as tax season progresses. Additionally, as a system designed for firms using an up-front scanning process, it frees professional staff from the administrative tasks associated with document scanning and management.

There is no separate fee for the Source Document Module; however, it will have a per-return pricing fee, which was yet to be determined at the time this article was written. FileCabinet CS starts at \$1,500.

### **Forms Supported for Automatic Population: FileCabinet CS**

with the Source Document module can be used to classify and extract data from numerous forms (W-2, 1099-INT, 1099-DIV, 1098, 1099R, 1099MISC, 1099G, 1099B, W-2G, 1099Q, 1098E, 1098T, 2439 and SSA).

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