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cPaperless, LLC — CPA SafeMail 3.1

800-716-2558 x100

www.cPaperless.com

From the **April 2013 review** of client portal systems.

Best Fit:

- Firms who want to use a range of tools to automate the preparation and secure transmission of documents to and from third parties.
- Firms who want to adopt the CPA SafeSign electronic signature service.

Strengths:

- Outlook add-in allows users to securely transmit small files via e-mail as embedded attachments in password-protected PDF files. Large files can be delivered from within Outlook to an included secure portal where the recipient can download over an encrypted channel.
- Common document processing steps like converting Microsoft Office files to PDF, embedding watermarks in PDF files, file encryption, and e-mail preparation are handled by an Outlook add-in.
- Large files can be prepared in Outlook and then made available to users over a secure portal.
- Optional CPA SafeSign electronic signature service allows users to receive electronically signed forms like engagement letters and some routine forms (although not IRS Form 8879).

Potential Limitations:

- Some users may be confused by how the e-mail transmission tool embeds

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three methods of securely transmitting documents to and from outside parties, including:

- Attaching files as items embedded in an encrypted PDF file which is attached to e-mail
- A traditional portal for exchanging large files securely
- A secure, anonymous “dropbox” where clients can upload data for a staff member without logging into the portal.

The product utilizes an add-in for Microsoft Outlook 2007 and 2010 which automates file preparation, uploads large files to a portal, and uses the secure password assigned to the recipient to encrypt the PDF file container.

This add-in also provides automated features not available in other products, including automatic conversion of files to PDF, automated insertion of a “watermark” in the resulting file, and integration with the CPA SafeSign electronic signature technology. The Company asserts that this process automation can save 7-10 minutes each time a file is transmitted.

Storage and hosting for CPA SafeMail portals is done on dedicated servers in a commercial web hosting facility with redundant power, internet, and cooling operated by a recognized national company. The primary facility where the data is stored is subject to an annual SSAE 16 (SOC) attestation engagement, (although a copy of this report has not been provided to us at press time).

Passwords required to open files created with CPA SafeSign can be created by the Firm, set to use the last four digits of a social security number (not recommended), or created by the end user on the CPA SafeMail secure portal. Once the files are opened with this password, users can immediately extract unencrypted versions of the attached documents. (e.g. The embedded files such as tax returns and confidential

documents will not require a password to open in the future after they are extracted

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Summary & Pricing

Plans start at \$175 per user, per year (e-mail transfer only) or \$350 per user, per year (e-mail transfer or portal file transfer), with discounts for multiple users. Outlook add-in requires Microsoft Outlook 2007 or 2010, and portal plans include unlimited clients, bandwidth, data transfer, and storage. Electronic signatures start at \$2.25 per document, and volume discounts are available. (A free 30 day trial of the CPA SafeMail product is available upon request.)

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