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FIRM MANAGEMENT

2018 Review of Client Portals for Accounting Firms

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Mary Girsch-Bock • Oct. 15, 2018



There are few industries as paper-driven as accounting. W-2s, 1099s, bank statements, and other tax related documents all start out as paper documents. The ability to import some of these items electronically has helped reduce paper loads, but the biggest impact to accountants and CPAs has been the advent of the portal.

Designed to simplify the sharing of documents between CPAs and their clients, portals can offer a variety of features and functions including document storage, e-signature capability, as well as most importantly, the ability for clients to easily upload relevant documents directly to the portal, where firm personnel can easily access them. In turn, accountants can then share completed tax returns safely and securely with their clients, with clients able in many cases to electronically sign the completed documents and return them to their CPA, all through the portal. Portals also allow firms to share larger files or confidential emails and other correspondence securely, without the need for further encryption.

Portals also work to increase office productivity, eliminating the need to copy and file mounds of client paperwork, while eliminating the issue of lost or misplaced documents and worse, the time-consuming process of trying to locate those documents. Portals also make it much easier on your clients. No longer do they need to schedule an appointment to come into the office to sign completed tax returns and other documents. Instead, they are able to access the documents at their leisure, sign them electronically, and return them to your office, without the need to leave work in order to do so.

In this issue, we reviewed several client portals, with many of these portals designed specifically for the needs of accounting professionals. The products included are:

- [AccountantsWorld Cloud Cabinet Client Portals](#)
- [CCH Axxess Portal](#)
- [Citrix Share File](#)
- [SmartVault](#)
- [Thomson Reuters NetClient CS](#)

A features chart is also included in the review which displays some of the more important features typically found in a portal.

It may be helpful to decide exactly what features you desire in a portal. If you offer payroll services to your clients, you will want to have a portal available where clients and their employees can easily access payroll information, upload W-4's and access pay stubs. If you prepare tax returns, you'll likely want a portal that offers bi-

directional capability, so both you and your clients can upload and download documents directly from the portal. Asking and answering these questions will make it much easier to find the portal likely to work best in your firm. Conveniently, all of the products reviewed in this issue offer a free trial, making the selection process even easier.

Not just for large accounting firms, firms of any size can use a portal to make their lives much easier, while also keeping their clients happy in the process.

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