

News, Partner topics, Technology

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DOCUMENT MANAGEMENT FOR CPA FIRMS

Brady Ware has been "paperless" since beginning our journey in the Fall of 2000. We did it in stages (like I recommend you do almost everything new in your firm). After only two tax seasons we were a digital firm. However, we were not truly paperless (meaning we keep no paper files nor route paper around the office for review) until we adopted a document management solution. Here is our timeline:

1. Fall 2000 - Time & Billing (probably the biggest paper waster of them all back then)
2. Winter 2001 - Individual income tax
3. Summer/Fall 2001 - Audit/Review
4. Winter 2002 - Business tax

The firms that were the early adopters (most of them, not all) waited for several more years before making the move to a true document management software solution. In those early years, we felt like none of the vendors had a true, workable solution. So, we waited and used a very strong document tree to organize and find things.

Then around 2005/06, many firms, including us believed the vendors had evolved and were providing a solution that worked well within the CPA firm environment.

The current issue of CPA Technology Advisor has a good article by Randy Johnson that gives a run-down on the current state of document management for CPA firms.

He sees the key competitors as (in no particular order):

Thomson GoFileRoom

Thomson FileCabinet CS

Doc-It DM

Acctlst EDRMS

CCH ProSystem fx Document

Interwoven Worksite

Three years ago we chose GoFileRoom. We believed they were slightly ahead of the game at that point in time and have been very pleased. I also have a lot of faith in the other products listed here in that I have talked to firms using each one and all seem content.

I am sure many of you are on your way down the digital firm path but probably not yet seeing the pot of gold at the end. Like CHANGE in most firms, it will not be a slam-dunk! Use education, training, phase-in in steps and do lots of hand-holding.

Read the article - [click here](#).

I bet you have noticed that your doctor's office is paperless now??

"The first step in getting to a paperless society is getting rid of the lawyers." - - Carl Stoddard

Posted by Is your firm healthy on the inside? at 7:05 AM 0 comments

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