



Beyond FileCabinet CS:

What Every UltraTax CS User Should Know Before Choosing a Replacement

Thomson Reuters® has officially announced **FileCabinet CS® will reach end-of-life in 2027**. This creates immediate urgency for UltraTax CS® users who need to find modern alternatives that seamlessly work with their tax prep app.

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EXECUTIVE SUMMARY

If you're an UltraTax CS user still relying on FileCabinet CS, you're facing a critical decision point. But this isn't just about finding somewhere else to store your documents. This is your opportunity to fundamentally upgrade how your entire firm operates (yes, really).

We've seen it again and again with our customers: the firms that lean into this transition end up significantly improving how their entire practice runs.

Most accounting firms today are drowning in disconnected tools. You've got one system for document storage, another for client portals, a third for e-signatures, and maybe a fourth for client intake. According to the [2025 CPA.com + Bill Growth and Technology Survey](#), 97% of accounting firms believe they're not using tech efficiently, and nearly 50% say their current stack actually increases manual work.

Meanwhile, your clients are getting frustrated jumping between multiple logins just to submit their tax documents, and your team is losing hours each week context-switching between applications.

This guide will show you:

- Why the FileCabinet CS sunset is actually an opportunity, not a crisis
- How leading firms are consolidating their tech stack while improving efficiency
- A step-by-step action plan for making the transition before you're forced to
- How emerging technologies like AI-powered client intake can transform your workflow

Your investment in UltraTax CS is solid – this is about enhancing it with tools that make your entire tax workflow more efficient, secure, and profitable.



Rhody Deane · 3y ago

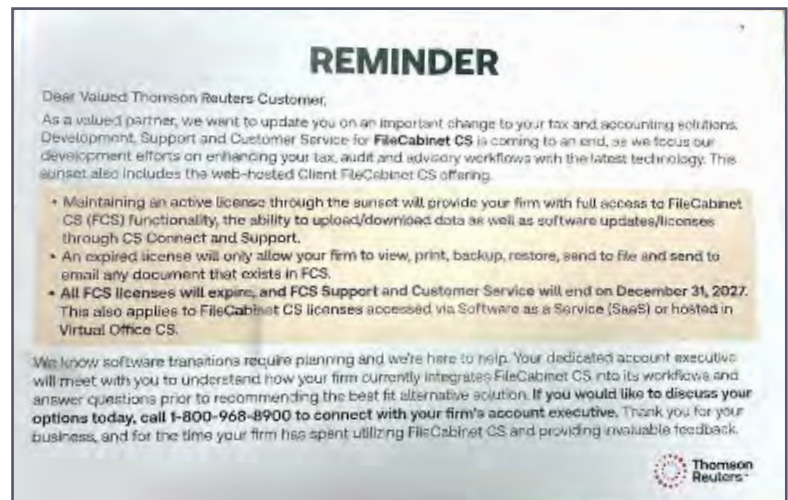
Following this. We're having similar issues as some have mentioned here. FC seems to be slowing down, and NetClient is just awful. We've been using both for years. We're not leaving UltraTax, but need a better client portal solution, and seems like we need to start thinking about FC sunseting or being over capacity.



Chapter 1: The FileCabinet CS Crisis: Why Waiting Until 2027 is a Mistake

If you've been in the accounting world for a while, you've likely heard the rumors for years: "There's no way they'll keep FileCabinet CS running much longer."

Whether it came from a colleague, a sales rep pushing Onvio, or the threads lighting up on r/taxpros, everyone could sense it coming. And honestly? That alone says a lot about how outdated the software had become.



It's Official: FileCabinet CS Will Reach End-of-Life in 2027

Thomson Reuters has now confirmed it: support for FileCabinet CS will end in 2027. That might feel like a distant deadline, but if you've lived through even one busy season, you know the truth: Waiting until the last minute is a recipe for chaos. Plus, you'll lose 2+ years of competitive advantage and efficiency gains if you wait to move.

Still Running FileCabinet CS?

You're dealing with limitations that become more painful every day:

- A measly 100GB storage cap forcing impossible choices about document retention
- Client restrictions that cap your growth potential
- No cloud access, making remote work a pipe dream
- Manual document routing eating up billable hours
- End-of-life status meaning no new features or support
- Security features that haven't kept pace with modern threats

Why Waiting Until 2027 is a Mistake

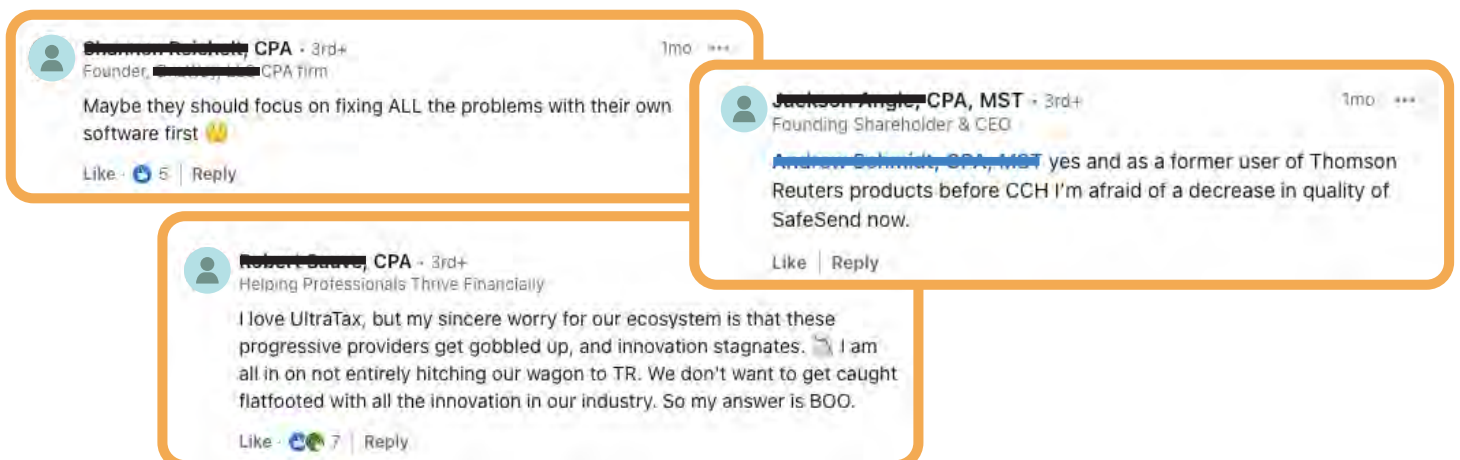
Here's what happens when firms wait until the last minute to replace critical infrastructure:

- **Lost Competitive Advantage:** While you're managing with outdated tools, your competitors are already benefiting from modern systems that automate manual processes, provide better client experiences, and free up staff time for higher-value work.
- **Staff Retention Issues:** The best talent expects modern tools. Force them to work with antiquated systems while other firms offer streamlined workflows, and you'll find yourself losing people to competitors.
- **Client Expectations:** Your clients are comparing your service to every other digital experience they have. Banks, retailers, even their doctors are providing better digital experiences than FileCabinet CS can deliver.

The Thomson Reuters Pattern: What History Tells Us

Thomson Reuters acquired SafeSend in January 2025, and the accounting community's reaction speaks volumes about Thomson Reuters' reputation in the software space. Given their track record with acquired products like SurePrep and TaxCaddy, coupled with their own products like FileCabinet CS, Onvio, and NetClient CS, many CPAs are predicting a similar fate for SafeSend — a once-innovative solution that may soon struggle with the same issues plaguing other Thomson Reuters software. And if history repeats itself, firms can look forward to the traditional post-acquisition "innovation fee" (aka price hike) that seems to follow every Thomson Reuters purchase.

This latest acquisition reinforces why **forward-thinking firms are breaking free from Thomson Reuters' ecosystem wherever possible.** While UltraTax CS remains solid for tax preparation, firms are increasingly turning to independent, specialized solutions for critical functions like document management and client collaboration — areas where Thomson Reuters has consistently fallen short of modern practice needs.



The image shows three social media comments from CPAs, each enclosed in an orange rounded rectangle. The comments are:

- Shannon Reichelt, CPA** (3rd+), Founder, [redacted] CPA firm: "Maybe they should focus on fixing ALL the problems with their own software first 🙄" (5 likes, 1mo ago)
- Jackson Angle, CPA, MST** (3rd+), Founding Shareholder & CEO: "yes and as a former user of Thomson Reuters products before CCH I'm afraid of a decrease in quality of SafeSend now." (1mo ago)
- Robert Sauer, CPA** (3rd+), Helping Professionals Thrive Financially: "I love UltraTax, but my sincere worry for our ecosystem is that these progressive providers get gobbled up, and innovation stagnates. 🙄 I am all in on not entirely hitching our wagon to TR. We don't want to get caught flatfooted with all the innovation in our industry. So my answer is BOO." (7 likes, 1mo ago)

The Real Costs of Inadequate Software

Here's the thing about technology: it's either making your life easier or making it harder. There's really no in-between.

With unreliable document management and portal systems – *those solutions you've been "making work" but are actually making you work harder than you should* – let's consider what's really happening in your practice:

Lost Revenue (That You Might Not Even Know About)

When [storage limitations](#) and inefficient portals force you to cap client capacity or manual processes consume billable hours, your firm's growth potential suffers. Many firms don't realize they're leaving thousands of dollars on the table each month due to:

- Every minute spent hunting for documents across disjointed systems
- Storage limits forcing you to turn away new clients
- Manual document routing and portal management consuming valuable billable hours
- Time wasted helping clients navigate clunky portal interfaces
- Staff overtime dealing with portal access issues and document requests
- Physical storage, printing, and shipping costs when digital solutions fail

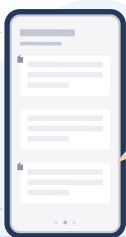
The productivity gap between firms using modern systems and those with legacy solutions grows wider every tax season. Your staff is spending hundreds of hours on manual tasks that could be automated, directly impacting your bottom line.



WTFootCPA • 2y ago

I came from a firm using Ultratx and the CS suite (NetClient for portal, FileCabinet for docs, and Practice for CRM). Thomson Reuters is primarily pushing Onvio instead of the CS suite, and I have generally not heard good things. Plus they've had a ton of problems with outages this year in their VO setup.

I would not recommend NetClient or FileCabinet. They're dated and difficult. Our clients had TONS of headaches with NetClient and admin lost hours and hours walking clients through use on the phone.



The Great Staff Exodus

Forcing staff to wrestle with outdated technology and complicated portal systems creates unnecessary friction. Your employees expect tools that enable rather than hinder their work. The impact is clear:

- Young professionals expect modern tools - not workarounds from 2005
- Remote work shouldn't require multiple logins and complex VPN setups
- Training on outdated systems and portals takes longer and yields poorer results
- Your best people are likely job hunting if they're wrestling with outdated tech daily
- Time wasted managing client portal access and troubleshooting issues

As [Kristie Agar of O'Connor and Agar CPA](#) discovered, the right technology can transform staff experience: "SmartVault is so easy to use. I did a quick screen share showing our seasonal hire the interface, and she was off and running without excessive training."

The Client Experience Gap

Today's clients expect instant access to their documents, seamless communication, and professional digital experiences. Think about it: your clients manage their bank accounts from phones, stream movies instantly from anywhere, and order groceries with a click – but with NetClient CS, they struggle with:

- An outdated portal interface that frustrates them
- Limited mobile access to their documents
- Multiple login credentials for different services
- Complex document sharing processes
- Slow portal performance during peak times

Security: The Thing Keeping You Up at Night

If you're using basic security features in 2025, you might as well leave your front door open. As cybersecurity threats evolve, basic security features no longer provide adequate protection for sensitive client data. Firms need:

- Real security frameworks
- Automated, reliable data backed up in the cloud for business continuity
- Actual compliance tools
- Protection that works in the real world
- Modern data encryption standards

Thinking Outside of the Ecosystem: How Outdated Platforms Hold You Back

For UltraTax CS users, these challenges are particularly pressing as Thomson Reuters phases out FileCabinet CS, Onvio users report ongoing difficulties, and NetClient CS falls further behind modern portal capabilities.

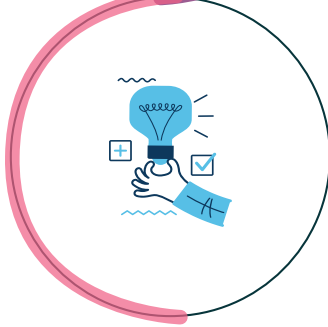
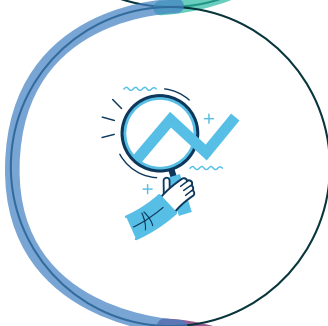
Operational Efficiency

Firms waste valuable hours managing disconnected systems and wrestling with complicated user management. Teams struggle with redundant data entry and time-consuming maintenance, while integration issues prevent streamlined workflows, even within the Thomson Reuters ecosystem.



Security & Compliance

Aging systems introduce growing security vulnerabilities, while fragmented platforms create inconsistent audit trails and risky data silos. Meeting evolving compliance requirements becomes increasingly complex with outdated technology solutions.



Growth & Innovation

Legacy systems create barriers to expansion and market growth, while limited customization prevents firms from building distinctive brands. Without modern collaboration tools, firms miss opportunities to innovate and adapt to emerging practice areas.

Client & Staff Experience

Modern clients expect seamless digital experiences but face frustrating, outdated portals and inefficient document sharing. Staff burnout rises from constant workarounds and complex processes, while onboarding new clients requires excessive time.

Chapter 2: Beyond “Good Enough”: What Your Tech Stack Should Actually Do For You and Your Clients

Here’s the thing: Just because these scenarios are common doesn’t mean they’re normal. Sure, tax work will always have its headaches (we’re looking at you, K-1s that arrive on April 14th), but wrestling with clunky DMS and portal systems shouldn’t be one of them.

Understanding Document Management Systems

A [document management system \(DMS\)](#) is a robust solution designed to store, manage, track, and secure digital documents. Think of it as a digital filing cabinet – except this one doesn’t lose documents, require manual sorting, or prevent you or your clients from accessing docs on the go.

Accounting firms can’t settle for DMS solutions that offer simple file storage. You need advanced features tailored to the unique needs of your profession, helping you create and efficiently manage your end-to-end document workflows.

The Downside of Generic DMS Solutions

There are countless DMS platforms on the market, with many generic options marketing to every business and industry. However, these basic file storage and sharing solutions create significant challenges for accounting firms:

- **Industry Automation Gaps:** Generic DMS force accountants to manually organize tax documents and handle workflows that should be automated, leading to wasted time and costly errors.
- **Integration Problems:** Without integration with your tax prep software, you’ll spend hours manually transferring data between systems, creating fragmented workflows.
- **Security Shortcomings:** Standard DMS lack the robust security features accounting firms need, putting client data at risk and making compliance a constant challenge.
- **Growth & Service Barriers:** As your firm grows, generic DMS restrict your potential with limited storage, weak collaboration tools, and no accounting-specific features.

The Critical Role of Client Portals

Remember when we thought faxing was cutting-edge? Those days are gone (at least for most of us). Today's clients expect the same [smooth digital experience](#) they get from their bank – not a portal that feels like it was designed when fax machines were cool.

They want to sign documents on the go or in their neighborhood coffee shop. And believe it or not, it's not like your clients enjoy calling or emailing you to get that W2 they need. It's much faster for them to just access docs by themselves.

The Problem with Basic Portal Solutions

Many firms struggle with inadequate portal solutions like NetClient CS that create more problems than they solve. For example, outdated interfaces frustrate both staff and clients, leading to increased support calls and wasted time.

Limited Functionality:

Basic portals often lack modern features like:

- Mobile accessibility
- Integrated eSignature
- Customizable branding
- Bulk document sharing

Technical Limitations:

- Complex user management across multiple products
- Poor performance during peak tax season
- Limited storage capacity
- Basic security features that may not meet compliance needs

Integration Issues:

- Multiple logins required for different services
- Manual document routing between systems
- Disconnected workflows between tax software and portal



What Your Document Management and Portal Platform Should Actually Do For Your Firm

Let's look at how the right technology can impact key areas of your practice.

Operational Efficiency: From Chaos to Control

When [John Coleman's firm](#) was struggling with inefficient document management, they could handle about 400 tax returns per season. "We were drowning in manual processes," he recalls. After implementing a modern solution, everything changed.

"We went from preparing about 400 tax returns to over 670—more than we have ever done. This growth was only possible because we found a better way to manage our documents and client communications."

The key was automating the routine tasks that consumed valuable time. Instead of staff manually filing documents, modern systems automatically organize tax returns and source documents. "It's so quick and much more efficient than what we used to do, and our admin loves it because she doesn't have to go through and manually pull those pages and send them." And rather than playing email tag with clients, secure portals streamline communication and document collection.

Another bonus? Better work-life balance – even during the busy season. John's children play baseball, and he's passionate about being at their games. "I was afraid I was going to miss my children's games due to my work," he says. "That never happened during this tax season. I was front and center not only for each game, but also every practice."

The Concern With the "All-in-One" Promise

Practice Management (PM) systems play a vital role in running an efficient accounting firm. No question about that. But when these platforms try to be everything to everyone, promising an "all-in-one" solution, something has to give. Too often, what gives are the essential functions firms rely on daily — especially document management and client portals. Instead of robust, specialized tools, firms end up with underdeveloped features that create more problems than they solve.

Want to learn how leading firms are maximizing their Practice Management investment while avoiding the "all-in-one" trap? Through real-world examples and expert insights, our ***Beyond Practice Management*** guide demonstrates how firms can complement their PM software with specialized document management tools.



[Download the Guide](#)

Growth & Innovation: Breaking Through Barriers

Nick Boscia, CPA of Boscia & Boscia faced a common dilemma: how to grow the practice without sacrificing work-life balance. The answer lay in modernizing their document management approach. “Operating our tax practice was really difficult before,” Nick shares. “Collecting and sharing documents with clients was incredibly inefficient and time-consuming because our clients followed different processes. They were either dropping off physical paper and then we’d have to scan it – and obviously that’s super inefficient – or they’d send us documents in an unsecure email.”

After implementing a modern solution in 2019, Nick [doubled the firm’s client base](#), dramatically improved retention, and achieved the holy grail of the accounting world: making more money while working less.

“If I have to be in my firm every day working for it to operate, I’d never be able to go on vacation and do the things that I love outside of work,” he explains. “If you’re not living your dream life, there are tools out there to make your firm better and give you the life you want...My fiancé and I just went to Bali for two weeks and our firm ran completely fine without me there.”

Modern platforms enable growth by eliminating the traditional constraints of paper-based systems and basic digital storage. With unlimited storage, automated workflows, and scalable user management, firms can focus on growth instead of administrative overhead.

Accomplish this at your firm.

Featuring insights from Nick Boscia, CPA, EA, and Nick Sinclair, Founder of TOA Global, our guide, *Work Less, Earn More: How to Build a Self-Sustaining Accounting Firm* provides actionable steps to transform your firm from a time-consuming venture into a self-sustaining practice.

[Download the Guide](#)



Security & Compliance: Protection Without Friction

Eric Green initially looked for a modern solution to address security concerns. “I want to ensure our documents are securely backed up and accessible from anywhere,” he explains. “For firms and their clients, safely and securely maintaining documents is integral to any business continuity plan. This means getting everything — and I mean everything — into the cloud. This ensures I have reliable backups, so if anything happens to my data or office, I can access the backups and rapidly resume operations.”

Eric also notes that accountants deal with documents that identity thieves would see as a goldmine. “We receive social security numbers, copies of tax returns, bank statements, utility bills, etc. The movement of this information back and forth simply cannot go through email.” The right client portal can completely eliminate those emails, enabling clients to upload, view, and download documents from the portal.

A modern system provides bank-grade security, detailed audit trails, and granular access controls without creating barriers to productive work.

But the benefits of having a modern platform went far beyond security: The real surprise was the [staggering \\$150,000 per year](#) in productivity savings for his firm.

“We accomplish this because we’ve streamlined workflows and made the onboarding process more efficient. We also created a template with our folder set-up. Regardless of which staff person at Green & Sklarz onboard a new client, the process remains consistent: Each client receives the same folder structure and uploads their files accordingly, saving us hours of time.”

By streamlining client onboarding and eliminating time-consuming manual document management tasks, his team was able to redirect that billable time toward more revenue-generating client work.

Client & Staff Experience: Making Everyone’s Life Easier

Dawn Brolin, CPA, CFE, discovered how modern technology could transform both client and staff experience. “What I love about having a [single source of truth](#) for clients specifically is that all their source documents are easily accessible. If they need copies of tax returns to buy a home, they can quickly find what they need – all without our assistance.”

This self-service capability doesn’t just make clients happy, it frees up staff time for higher-value work. When clients can easily access their documents, complete and sign forms electronically, and securely share files, everyone wins. Staff spend less time on administrative tasks and more time serving clients.

As these firms discovered, the impact of having the right technology goes far beyond simple file storage – it touches every aspect of how your practice operates and grows.

A Key to Success: Solving Tech Sprawl

In the last few years, most firms have added more tech to their workflow than they've removed. And now? Well, you might not notice it at first. A few extra clicks. A few more tabs. Another password to remember (your 47th this year, but who's counting?). Then come the Slack messages: "Hey, I can access the client data in the DMS but not in the proposal tool... can you give me access so I can start this return?"

But eventually it'll hit you: you're spending more time managing software than actually doing the work you earn all these CPE credits for.

You're trying to convince your team and your clients to embrace yet another new tool. Trying to get your workflow to work across all those apps.

The cost of tech sprawl adds up fast. You end up with document silos, click-heavy workflows that require redundant data entry, and too many logins for your staff and clients. Everyone starts developing what we call "app fatigue" — that glazed look they get when you mention implementing "just one more quick solution." Ultimately, in an attempt to improve things, many firms find themselves creating more obstacles and confusion.

It's obviously inefficient. Yet somehow, that's where most accountants find themselves.

In fact, according to the 2025 CPA.com + Bill Growth and Technology Survey: 97% of accounting firms believe they're not using tech efficiently. Nearly 50% say their current stack actually increases manual work, and 38% blame lack of system integration for workflow breakdowns.

And that's just the internal side of the problem. Clients feel it, too. They're juggling multiple apps just to submit documents, struggling with different login credentials for each step of the process, and getting frustrated by the lack of visibility into where their tax prep stands. When you send them three different links — one for document upload, another for e-signatures, and a third for accessing completed returns — they start questioning whether your firm has its act together.

And honestly? Can you blame them? They're paying for professional service, yet you're making them navigate an obstacle course just to get their taxes done.

So, How Can You Consolidate Your Tech Stack?

Start by looking for tools that support multiple workflows, not just one sliver of your process. It should simplify the experience for your staff and your clients and seamlessly integrate with other tools for a smooth workflow. That's exactly what SmartVault was built to do — and it's why thousands of UltraTax CS users have made it their FileCabinet CS replacement of choice.

Chapter 3: Transform Your Practice (Without Breaking What Already Works)

When evaluating alternatives, it's critical to understand not just what you're moving away from, but what you're moving toward.

Thomson Reuters vs. SmartVault

Thomson Reuters' document management and portal solutions – from the sunsetting of FileCabinet CS to the antiquated NetClient CS – present accounting firms with significant limitations and challenges. Here's how [SmartVault](#) offers a more robust, modern alternative:

Infrastructure & Reliability

While Thomson Reuters users struggle with system outages, storage limits, and performance issues, SmartVault delivers:

- 99.999% uptime ensuring consistent access (no system outages)
- Unlimited cloud storage and client capacity
- Reliable performance even during peak tax season
- Modern cloud infrastructure supporting remote work

Client Experience

Thomson Reuters' fragmented solutions often create a disjointed client experience. SmartVault transforms client interaction through:

- An intuitive, modern client portal included at no extra cost
- Mobile-friendly access to documents and signatures
- Streamlined document collection and sharing
- Real-time collaboration capabilities
- A custom branded client portal with your firm's logo



Practice Management

Unlike Thomson Reuters' rigid systems, SmartVault adapts to your firm's needs:

- Automated document routing
- Comprehensive client onboarding tools
- Integrated eSignature
- Customizable templates and organizers
- Flexible user permissions and access controls

Integration Capabilities

While maintaining your UltraTax CS investment, SmartVault enhances your workflow through:

- [Direct integration with UltraTax CS](#) for automated file routing (more on page 14)
- Seamless connections with other popular tax and accounting platforms
- Automated folder creation and file organization
- Standardized naming conventions across systems

Security & Compliance

SmartVault provides enterprise-grade security that modern firms need:

- SOC 2 Type 2 compliance
- Bank-grade encryption
- Comprehensive audit trails
- FINRA, SEC, and GLBA compliance support
- Automated backup and disaster recovery

Support & Training

Unlike Thomson Reuters' often-criticized support, [SmartVault offers:](#)

- Dedicated onboarding specialists
- Comprehensive training programs
- US-based customer support
- Regular platform updates based on user feedback

Detailed product comparisons
are available here:

- [SmartVault vs. FileCabinet CS](#)
- [SmartVault vs. Onvio](#)
- [SmartVault vs. GoFileRoom](#)

SmartRouting: Built for UltraTax CS Users

Imagine if your documents could organize themselves – no more playing “where did I save that?” or creating elaborate folder naming systems that only you understand. That's what [SmartRouting](#) does, and yes, it's as awesome as it sounds. Instead of cobbling together workflows across multiple Thomson Reuters products, SmartRouting provides:

Automatic Organization

- Prints returns directly from UltraTax CS into organized, secure client folders
- Creates standardized folder structures automatically
- Maintains consistent file naming across your tech stack
- Routes documents instantly to the right location

Intelligent Processing

- Learns from your UltraTax CS naming conventions
- Adapts to your firm's organizational preferences
- Handles both individual and bulk document processing
- Maintains standardized naming across your tech stack

Error Reduction

- Eliminates manual filing errors
- Reduces risk of misplaced documents
- Ensures consistent organization



Real Results: A Case Study

When Kristie Agar of O'Connor and Agar CPA opened her firm, she was determined to find solutions that could streamline operations and provide a better client experience after years of struggling with Onvio. SmartVault delivered immediate results:

- Achieved a completely paperless workflow
- Simplified signature processes with unlimited eSignatures
- Enhanced client connectivity through an easy-to-use portal
- Streamlined document management and tax return handling
- Reduced training time for seasonal staff

[Read the Story](#)

“We don't waste time hunting documents across different programs, as everything is organized right in SmartVault,” Kristie explained. This efficiency and organization are why she enthusiastically recommends SmartVault to her peers.

Your Workflow: With & Without SmartVault

Automatically and effortlessly route and organize files with SmartRouting by SmartVault

With SmartVault & UltraTax CS

Without SmartVault & UltraTax CS

Onboarding Clients & Requesting Documents

Send a request list showing clients what forms and documents to complete and upload online



Manually request and remind clients to submit documents and forms via email, mail, or bringing them to the office

Track submittal status in a dashboard and quickly send clients reminders



Manually track submittal status and remind clients

Receive a notification when documents are uploaded; they're automatically saved in the correct folders



Manually organize, name, and save documents as clients provide them



Document Organization, Storage, and Staff/Client Access

Documents organized and stored digitally in a DMS and client portal



Documents scattered across folders, computers, and filing cabinets

Accountants, staff, and clients can securely access files anytime, anywhere

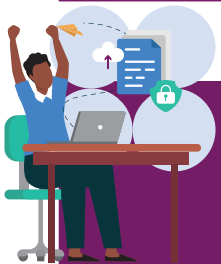


Difficult to find, organize, and share files

Can review, approve, sign, and share docs all through one system



No centralized digital storage for staff or clients to self-serve



Processing Tax Returns

Print returns from UltraTax CS to save them directly into SmartVault



Manually save return into SmartVault

Electronically share return with client to review and sign



Send completed return for client review and signature

Client signs the return electronically; it automatically routes to the correct folder



Clients return signed documents by mail, email, or dropping them off in person

“I used to have to print returns to a temporary folder, then upload and sort each one. With SmartRouting, I go straight from UltraTax into SmartVault with one click. It’s a huge time-saver.”

Kristie Agar of O’Connor and Agar CPA

SmartRequestAI: The Future of Client Intake

Ask any accountant or tax pro why they got into this profession, and you'll hear things like helping families plan for their futures or guiding businesses to stay compliant and profitable.

But ask them about their day-to-day, and the answer is often: "A lot of client intake." Gathering documents, chasing missing files, sending reminders, and juggling spreadsheets.

How SmartRequestAI Changes Everything

SmartRequestAI uses artificial intelligence to make client intake incredibly smart and personalized, while keeping your data completely private and secure. Here's how it works:

- AI scans last year's tax return, creating a personalized questionnaire for each client
- The questionnaire takes clients step-by-step, making it crystal clear what documents they need to share
- Clients upload documents through a modern, mobile-friendly portal ([SmartScan](#) automatically converts phone photos into professional PDFs)
- You see who's submitted and what's still pending in a real-time dashboard
- Documents arrive formatted, secure, and ready for prep in organized workpapers

The AI That Doesn't Learn From Your Data

One of the biggest concerns about AI tools is data privacy. Most AI systems improve by consuming user data, which means your sensitive client information could become part of their training sets. SmartRequestAI is different. It uses private AI that never trains on your customer data, delivers >99% accuracy when analyzing returns, and keeps everything within SmartVault's SOC 2 Type 2-compliant platform.

The Results: 60-90 Minutes Saved Per Return

SmartRequestAI takes the friction out of document collection and turns it into a guided, modern experience that saves everyone time. For you and your team, you can expect to save about 60-90 minutes per return on intake and organization tasks.

Coming Fall 2025: SmartRequestAI will be available to all SmartVault users, giving you the most advanced client intake solution available while maintaining the security and integration you expect. ([Learn more and join the waitlist here](#)).

Making it Stick: Getting Staff on Board

The key to successful adoption is making the transition feel manageable and valuable to your team. SmartVault has multiple onboarding packages, including one with dedicated training tracks for different roles in your firm, making this process seamless.

Before Launch:

- Migrate your data into SmartVault (We can help with that!)
- Identify and train “power users” who will attend SmartVault’s Champion Session program
- Access role-specific training materials through SmartVault Academy
- Document new workflows (your dedicated Onboarding Manager can assist!)
- Set clear expectations with implementation timelines

During Implementation:

- Establish a clear support system for staff questions
- Schedule regular check-ins with staff to address concerns
- Use SmartVault’s specialized training sessions for different departments
- Leverage SmartVault Academy’s workflow-specific guides and videos

Post-Launch:

- Share success stories and celebrate small wins
- Stay current with new features through SmartVault Academy training and the [SmartHub](#)
- Provide feedback to your Customer Success Manager for continuous improvement

Client Collaboration Guide: CPAs’ Tips for Managing Difficult Clients, Increasing Engagement, and More

Every CPA feels the pinch — unanswered phone calls, unreplied emails, ignored pleas to just attach one missing document or fill out one measly tax preparation survey. The flood of documents at 6pm on April 15, frantic clients expecting you to work miracles, and then complaining and threatening when they face extra fees and penalties due to their own procrastination. If this sounds like you and your firm, you’re not alone. This client-engagement crunch is a rite of passage for every firm.

Introducing “*The CPA’s Guide to Creating an Engaged, Cooperative Client Base*” – your roadmap to smoother operations and happier clients. This free guide gives practical tips for managing difficult clients, setting boundaries, empowering your clients, and more to improve their collaboration.

[Download the Guide](#)

Communicating the Change to Clients

Clear client communication is crucial for a smooth transition. SmartVault provides resources to make this process easier.

Before the Change:

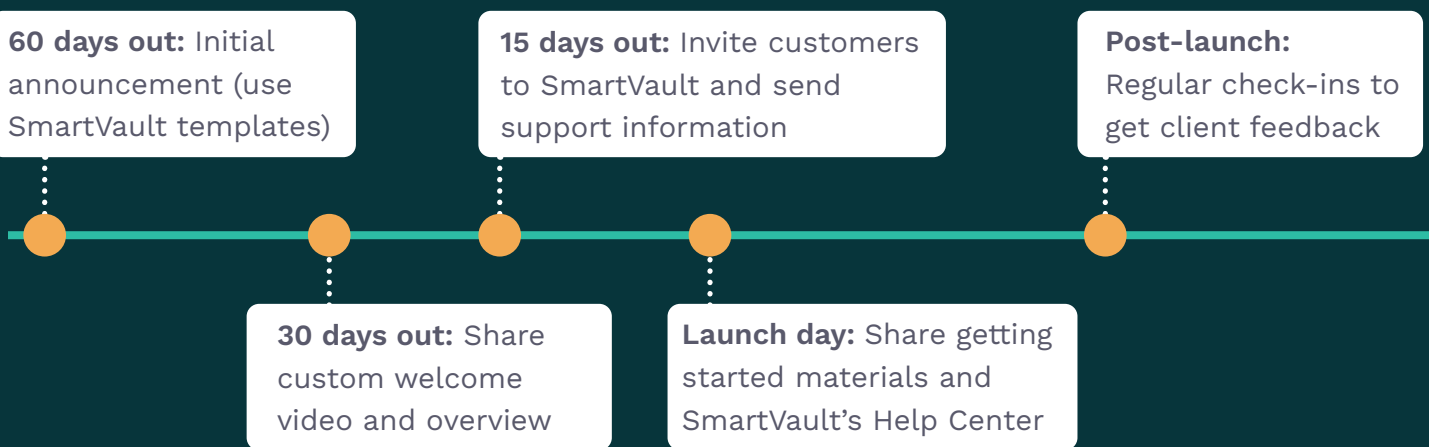
- Use SmartVault's communication templates to announce the upgrade
- Share custom welcome videos created by SmartVault for your clients
- Access client-ready training materials from SmartVault Academy
- Leverage SmartVault's FAQ documentation to address common concerns

Key Messages to Emphasize:

- Bank-grade security protecting sensitive data
- 24/7 access to documents through web and mobile apps
- Streamlined document submission through client portal
- Direct, secure communication channels
- Enhanced service experience through modern technology

This transition demonstrates your firm's commitment to providing better service through modern technology. With SmartVault's comprehensive support resources, you can focus on serving clients while the platform handles the technical details.

Sample Client Communication Timeline



Communicating SmartVault's Value to Your Clients

Share these benefits in your transition communications to help clients understand the value of the new processes and portal. Focus on the improvements that matter most to your specific client base – whether that's the convenience of mobile access, the security of their sensitive data, or the time saved with digital signatures. Remember to emphasize that this upgrade is part of your commitment to providing better service and protecting their information.

Before SmartVault

After SmartVault

Emailing sensitive documents, hoping they reach the right person	Upload documents directly to a portal (like having a digital safety deposit box)
Playing phone tag to get tax documents signed	Sign documents anywhere, anytime from your phone or tablet
Waiting for office hours to get copies of past returns	Easily access your documents 24/7 from any device
Wondering if your accountant received your documents	Get automatic notifications when documents are received and processed
Searching through email threads for important documents	Find any document instantly in your organized, searchable portal
Scheduling office visits to review documents together	Collaborate remotely with secure document sharing
Keeping track of paper copies for your records	Access a complete digital archive of all your documents
Limited to office hours for document requests	Submit documents and requests anytime that works for you
Unsure if you've sent everything needed	Track outstanding items with automatic reminders and checklists
Coordinating with multiple family members for signatures	Get multiple signatures easily with digital workflows

Conclusion: Your Path Forward

Breaking up with FileCabinet CS, Onvio, or NetClient CS isn't as scary as it seems. Think of it like upgrading from that flip phone you held onto way too long – you'll only wish you'd done it sooner.

As we've seen from firms like Nick Boscia's, who doubled their client base, and Eric Green's, who saves \$150,000 annually, the right technology can transform your practice from constantly struggling to keep up into a streamlined, profitable operation.

Why Now?

Let's face it – FileCabinet CS is sunsetting, Onvio keeps letting you down, and NetClient CS feels more outdated by the day. None of those solutions can keep up your practice or clients' expectations.

Remember, this isn't about finding a new tax prep app – Your investment in UltraTax CS is solid. This is about enhancing your UltraTax CS experience with integrated solutions.

Take the Next Step

Schedule a demo to see how SmartVault can help you:

- Automate the tedious stuff
- Protect your clients' data
- Give clients a portal they'll want to use
- Let your team work from anywhere (yes, really)
- Grow your practice without the growing pains



Learn More:
www.SmartVault.com

Schedule a Demo:
www.SmartVault.com/book-a-demo

SmartVault is the best investment I could have made and has provided me with the peace of mind to run my practice confidently and in the most efficient manner possible.”

Drisa A Carrizo, DAC Advisory Services