

# The FileCabinet CS<sup>®</sup> Sunset: A Strategic Planning Guide for UltraTax CS<sup>®</sup> Users



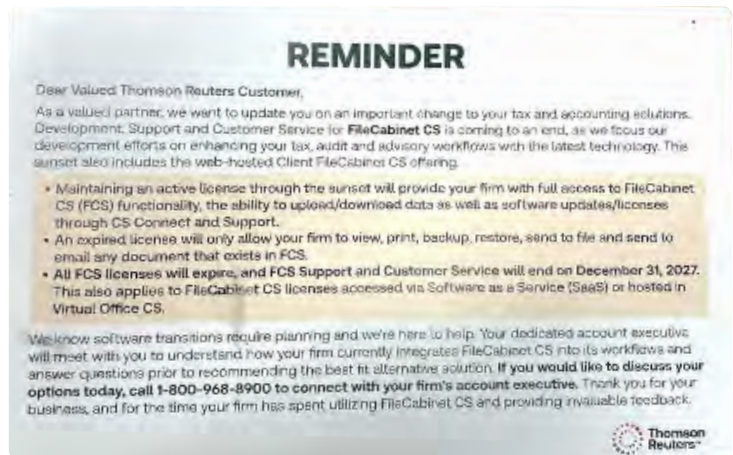
# FileCabinet CS Is Sunsetting — What Should You Do Now?

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 That alone says a lot about how outdated the software had become.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

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.



## Make the Move and Make It Count

Yes, switching software is a big deal. We get it. There's real concern around downtime, confused staff, migration mistakes, and business disruption. But staying put comes with hidden costs, and they're getting harder to ignore.

- That 100GB storage cap? It's limiting your client base.
- Manual document routing? That's time you could be billing.
- Outdated tech? It's driving away the talent you worked hard to hire.
- And your clients? They expect modern, mobile, seamless.

Firms that approach this as more than a software replacement avoid disruption and accelerate growth, boost profits, and deliver the client experience modern firms are built on.

→ Worried about migration? You're not alone. It's well-known that Thomson Reuters makes it difficult for users to export data. It's unfortunate, but that's how they've kept people on FileCabinet CS for so long. The good news? The right vendor can help. When evaluating vendors, ask them to share specific examples of migrations and outline a clear, proven process. They should have a [dedicated team](#) just for this, so you can get migrated and onboarded quickly and painlessly.



RhodyDeaner • 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 sunsetting or being over capacity.

## Think of This as More Than a Software Upgrade

Before we dive into the step-by-step plan for moving off FileCabinet CS, let's reframe the situation: **FileCabinet CS going away isn't a loss.** Yes, the change can be overwhelming, especially for firms who have relied on FCCS for decades.

But we've seen it again and again with firms: the ones that lean into this transition end up significantly improving how their entire practice runs. When you choose the right software, the benefits touch every part of your business:

- Increased efficiency
- Higher profits
- Happier clients
- A more scalable, modern firm

## Don't Limit Yourself to Thomson Reuters' Recommendations

Your natural instinct may be to stay within the Thomson Reuters ecosystem. But limiting your evaluation to just one vendor means potentially missing better solutions.

The most successful migrations we've seen happen when firms evaluate based on their specific needs rather than vendor relationships. Modern document management systems are designed to integrate seamlessly with UltraTax CS, often providing better functionality than the legacy systems they replace. ***We dive more into this on page 12.***

## 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:

"We don't waste time hunting documents across different programs, as everything is organized right in SmartVault," Kristie explained. "I went to Thomson Reuters' Synergy conference and told people, 'You have to check out SmartVault!' ... It reduces headaches and works much smoother than other document management systems. SmartVault is just easy to use, and everything is right where I need it."

[Read the Story](#)

## STEP 1

# Audit current tools and workflows

Many firms say technology is a strategic priority, but then don't track metrics to measure how well it's working. This means most firms blindly invest in tools without knowing if they're improving workflows or just adding noise.

So, before you even think about switching software, you need a clear picture of your current setup.

### To-do list:

#### Map out every tool currently in use:

Make a full list of all the platforms and tools in your tech stack: tax prep software, document management systems (DMS), eSignature tools, client portals, and task trackers. Note any gaps where you're handling files manually or using disconnected systems.

#### Identify recurring pain points:

Where are things breaking down? Look for inefficiencies like double data entry, broken integrations, or processes that require multiple manual steps. Document specific pain points around document management and secure client file sharing that SmartVault could address.

#### Talk to your team:

No one knows the software pain points better than the people using it every day. Ask them what's working, what's slowing them down, and what they wish they had.

## STEP 2

# Define goals for the new setup

Moving off FileCabinet CS opens the door to significant improvements, but the real power comes from pairing it with purpose-built integrations. Cloud tax software alone isn't enough—you need an [integrated document management and client portal solution](#) that completes your workflow. But without clear goals, it's easy to lose sight of what matters to your team.

### To-do list:

#### Define what “better” looks like for your firm:

Are you trying to reduce manual data entry? Improve turnaround time? Enhance the client experience? Get specific and visualize how documents should flow from client to preparer to reviewer to final delivery.

#### Evaluate SmartVault as your document management + portal companion:

- Replaces FCCS with unlimited cloud storage
- Replaces NetClient CS with a modern, branded client portal
- Directly prints and auto-routes documents from UltraTax CS
- Auto-organizes documents by client, year, and engagement
- Unlimited eSignatures, custom proposals, engagement letters, and client requests — all in one place

#### Prioritize the features that support those goals:

Use your vision as a filter to identify the most important functionality, whether it's integration depth, automation, scalability, security, and compliance, or remote and mobile access.

## STEP 3

# Inventory client and file data

Garbage in means garbage out. Don't migrate a mess. SmartVault's migration services make this a prime opportunity to clean up and standardize how you store files.

### To-do list:

**Create a full list of active and archived clients:**

Don't just export your client list and call it a day. Sort clients into categories (e.g., active, inactive, seasonal, or long-term) so you can prioritize what needs to move immediately and what can be archived or skipped.

**Audit your file types and formats:**

Make a note of what types of documents you're storing across the firm: PDFs, scanned images, spreadsheets, Word docs, etc.

**Flag sensitive files and custom access needs:**

Which folders or documents contain sensitive client data, payroll, bank info, or PII? Which files should only be visible to partners or managers? Create a list of any access rules or permissions that need to be rebuilt in the new system. SmartVault's granular permission settings make this easy to implement. In fact, permissions are automatically set as you add new clients, so you don't have to worry about remembering to set them (or spend time manually doing it per client).

## STEP 4

# Create a migration plan

A clear migration plan helps avoid deadline panic, team burnout, and expensive do-overs. Even firms with solid tech skills benefit from some structure here, especially when client files, internal roles, and software permissions are all in motion at once.

### To-do list:

**Choose a timeline that avoids major deadlines:**

Switching software right before or during tax season is a recipe for chaos. Aim for the off-season instead.

**Assign clear roles for core responsibilities:**

Don't let everything fall on one person's shoulders. Designate who's in charge of file migration, client communications, and staff training.

**Evaluate DIY vs. white-glove options:**

Some firms prefer to manage the migration in-house, using self-serve tools. Others opt for a more hands-on experience with help from their vendors — SmartVault, for example, has helped hundreds of UltraTax CS firms (and thousands across other platforms) migrate their data into SmartVault.

### Moving to “the cloud” stressing you out?

From data ownership myths to compliance misconceptions, our free guide reveals what tax professionals consistently get wrong about cloud security - and what they should be thinking instead. Download your copy of ***The Tax Pros' No-Nonsense Guide to Cloud Security: Tackling the 4 Biggest Myths Head-On***



[Download the Guide](#)

## STEP 5

# Prep your team

Even the best software will fall flat if the team isn't prepared. But most small firms don't invest in training.

When expectations aren't clear and the "why" gets lost, confusion and resistance fill the gap. That's why internal rollout needs just as much attention as the tech itself.

### To-do list:

#### **Schedule training sessions for new tools:**

Don't rely on trial and error. Set aside dedicated time for hands-on walkthroughs of your new systems. (With SmartVault, firms can choose between self-serve webinar options, staff-specific training modules, certification options, and personalized training sessions led by our onboarding and customer success teams.)

#### **Set up internal documentation and FAQs:**

Collect common questions and edge cases as they arise. Create a living internal doc or shared FAQ that covers login steps, how-tos, and support contacts.

#### **Collect real-time feedback as the team adjusts:**

Don't wait for frustration to boil over. Regular check-ins, Slack threads, or short surveys can surface small issues early.

## STEP 6

# Notify clients and update portals

Clients don't like surprises that involve how they access, upload, or share sensitive financial documents. Whether they're tech-savvy or still faxing forms, any disruption to their experience can trigger confusion or frustration if not communicated clearly.

### To-do list:

**Draft a clear, client-facing announcement:**

Let clients know what's changing, why it's happening, and how it benefits them. Highlight how SmartVault's client portal makes document sharing easier and more secure for them.

**Set expectations around new logins and processes:**

If clients will need to reset passwords, access a new portal, or change how they upload documents, make sure those steps are spelled out clearly. Provide deadlines and support contact info as well.

**Use branded portals to reinforce trust:**

A well-designed, branded client portal makes the transition feel polished and professional.

**Offer how-to guides or quick videos:**

A short screen-recorded walkthrough or step-by-step PDF can prevent dozens of support emails. If you're using [SmartVault's Enterprise Onboarding](#), you can even request a custom guest user video tailored to your firm's portal setup.

## STEP 7

# Run a pilot

A controlled pilot is one of the most important steps when switching software. It gives your team a low-risk environment to test everything before rolling it out firm-wide.

### To-do list:

**Start with a smaller group:**

Pick a test group that reflects your typical workload but won't create major risk if hiccups happen. This could be a single office, a small batch of returning clients, or even an internal team using the system for mock returns.

**Track key performance indicators:**

Use the pilot to evaluate file migration success, process speed, and client engagement. Pay special attention to time savings from the SmartVault integration compared to your previous document workflow — most firms save 10 minutes per return!

**Adjust folder structures, naming conventions, or workflows as needed:**

This is your chance to make real-time refinements before they scale. SmartVault's flexible folder templates make it easy to standardize document organization across all clients. Folders are then automatically created per client or engagement type, so you don't have to manually create the folder structure every time you add a new client or engagement.

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“Clients always know where to find their documents, and our staff can easily locate files when covering for each other. If I need to go to a conference for a week, my tax partner can go into SmartVault and have everything he needs to prepare a client's tax return. I don't have to email him a link – he just knows where to go because it's so consistent with our folder structure. This consistency significantly boosts our productivity, especially during tax season when we aim to be productive rather than just busy.”

**Dawn Brolin**

CPA, CFE, CEO, Powerful Accounting,  
The Designated Motivator

## STEP 8

# Go live

The official launch might feel like the finish line, but in reality, it's just the beginning. A successful go-live depends on how well your firm supports the team, captures feedback, and adapts in real-time.

### To-do list:

**Assign a dedicated point person for launch-day support:**

Make sure someone is on-call to handle real-time questions or issues. It doesn't have to be IT; it just needs to be someone with answers (or the ability to escalate quickly).

**Document common questions and issues:**

Every issue is a chance to improve. Keep a running log of what goes wrong, what confuses people, and how it was resolved.

**Lean on your vendor's support team:**

SmartVault's industry-leading support includes dedicated onboarding managers, live office hours, and the unique SmartHour service for quick refreshers even after onboarding is complete—support features that set them apart in the document management space.

# Worried About Choosing a DMS Outside of the Thomson Reuters Ecosystem? Don't Be.

Modern cloud document management systems are specifically designed to integrate with UltraTax CS, often providing better integration than the legacy systems they replace. This means you can **choose the best cloud system based on your firm's needs**, not just what your tax software vendor offers.

So, what does using a DMS outside of your tax prep's ecosystem look like? When your DMS has a direct integration, it can support your entire end-to-end tax prep workflow and enhance your existing tax software rather than replacing it. You'll get:

- The tax preparation tools you're already comfortable with
- Enhanced document management and client collaboration
- Elimination of manual steps and security risks
- A consistent, standardized workflow across your practice
- The ability to work from anywhere, on any device
- Better client experience with modern portal access
- Compliance with current security and regulatory requirements

The right cloud DMS adapts to your existing workflow rather than forcing you to adapt to it—enhancing what works while fixing what doesn't.

## Automate Every Step of Tax Season



## The End-to-End Tax Prep Workflow

SmartVault automates every step of your tax workflow, from client onboarding and document collection to tax preparation, secure delivery, and compliant storage.

### Engage – Automate Client Onboarding & Engagement

The right DMS will drastically improve how you engage new and returning clients:

- Send professional proposals and engagement letters with just a few clicks
- Allow clients to review and sign documents from any device
- Create new client records automatically with proper folder structures
- Set up client portal access with secure credentials
- Implement standardized workflows across your entire client base

### Collect – Simplify Document Requests & Tracking

Document collection becomes organized and efficient:

- Use AI\* to [scan previous 1040s](#) and generate custom request lists per client
- Walk clients through a questionnaire, 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)
- Track which clients have submitted which documents in real time
- Send automated reminders for missing information
- Receive instant notifications when clients upload documents
- Automatically route incoming documents to the correct folders

Sergio Bustamante, CPA needed a DMS that could scale with his rapidly growing firm. As an UltraTax CS user, he naturally tried Onvio first, staying within the Thomson Reuters ecosystem. The result? “An absolute nightmare” during tax season precisely when reliability matters most.

By looking beyond the Thomson Reuters ecosystem, Sergio discovered SmartVault. Its direct integration with UltraTax CS automatically routes documents to the correct client folder every time. His clients now easily review, eSign, and approve returns through the intuitive portal, while sharing and accessing their documents securely from anywhere.

“With SmartVault as our document management foundation, we’re confident in our ability to scale efficiently while keeping our clients’ data secure and accessible,” Sergio confirms.

[Read His Success Story](#)

## Prep & Review – Automate Workpaper Organization & Tax Prep

Tax preparation becomes streamlined regardless of which tax software you use:

- Sync tax docs directly with UltraTax CS (and other leading apps)
- Access source documents directly without leaving your tax software
- Maintain version control so you always know which document is current
- Implement standardized workpaper organization across all clients
- Enable team collaboration with role-based access controls
- Convert scanned documents to searchable PDFs automatically

## Deliver – Secure Tax Return Delivery & Payments

Return delivery becomes secure and professional:

- Print completed returns directly from your tax software to the cloud DMS
- Automatically route returns to the correct client folders
- Send secure links for clients to review and sign returns
- Implement KBA (Knowledge-Based Authentication) for Form 8879 compliance
- Track which returns have been delivered, viewed, and signed
- Restrict access to final returns until payment is received
- Deliver returns individually or in bulk during busy season

## Archive – Stay Audit-Ready & Compliant

Long-term document management becomes effortless:

- Maintain secure archives that meet regulatory retention requirements
- Implement consistent folder structures across all clients
- Search across all client documents instantly
- Track who accessed which documents and when
- Maintain compliance with IRS Publication 4557 and FTC Safeguards Rule
- Scale storage needs without hardware investments

SmartVault's [SOC 2 Type 2 compliant](#) platform gives you the gold standard of security compliance. This means your firm benefits from reduced liability, increased client trust, and the ability to attract high-value clients who require the highest security standards.



# Wrapping Up: This is Your Chance to Build a Better Firm

Replacing FileCabinet CS might feel like a hassle now, but firms that have already moved tend to say the same thing: “We wish we had done it sooner.”

This is your chance to move to the cloud, streamline how your team works, and deliver the modern client experience your firm deserves. With SmartVault, you don’t have to start from scratch or figure it out alone. We’ve helped thousands of firms transition off FileCabinet CS with guided migration, best-practice workflows, and personalized support from day one.

Ready to see what SmartVault can do for your firm? [Request a SmartVault demo](#) and get a firsthand look at how we help firms break free from FCCS.

**Learn More:**  
[www.SmartVault.com](http://www.SmartVault.com)

**Schedule a Demo:**  
[www.SmartVault.com/book-a-demo](http://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



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