



2008 AICPA Information Technology Conference

Client Service Portals & Collaboration

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Agenda

- What's a Portal and Why do you Need One?
- Changing Environment
- Group Interaction on Solutions Deployed
- Solutions and Features
- Overview WS+B's Solution
- Best Practices and Sharing by the Group



Goal

Leave the Session with a
Better Understanding of **Portals** and
What you Should do to Keep **Competitive**



Portal

You may not have spotted "Client Portals" in reviewing the release of the AICPA's 2008 Top Technology Initiatives, but if you scanned the list a little further on those making the "Honorable Mention Category", you would have caught Client Portals in the #15 slot!



Portal

- Secure Site
- Store Content
- Access Content
- Retrieve Content



Content

- Produced by the Client
- Produced by Business Systems (Accounting)
- Produced by Third Parties (Brokerage Firms)
- Produced by the CPA Firm



Security

- Most shared documents today in PDF, Document or Spreadsheet formats
 - Control File Versions
 - Control File Access
- Greater Security than Email Attachments
 - Easier than Encrypted Emails



Changing Environment

#1 - Information Security Management



- Arizona - \$10,000 per breach
- Hawaii - \$2,500 per violation
- Idaho - \$25,000 per breach
- Indiana – up to \$150,000 per violation + costs & exp's
 - Michigan - \$750,000 cap
 - New York - \$150,000 cap
 - Rhode Island - \$25,000 cap
 - Utah - \$100,000 cap



Security Breach Notice Legislation

California – 7-1-03	Minnesota 1-1-06	Nebraska 7-13-06
Arkansas 3-31-05	Nevada 1-1-06	Colorado 9-1-06
Georgia 5-5-05	New Jersey 1-1-06	Arizona 12-31-06
North Dakota 6-1-05	Maine 1-31-06	Hawaii 1-1-07
Delaware 6-28-05	Ohio 2-17-06	Kansas 1-1-07
Florida 7-1-05	Montana 1-1-06	New Hampshire 1-1-07
Tennessee 7-1-05	Rhode Island 1-1-06	Utah 1-1-07
Washington 7-24-05	Wisconsin 3-31-06	Vermont 1-1-07
Texas 9-1-05	Oklahoma 6-8-06	Michigan 6-29-07
North Carolina 12-1-05	Pennsylvania 6-22-06	District of Columbia 7-1-07
New York 12-8-05	Illinois 7-1-06	Oregon 10-1-07
Connecticut 1-1-06	Idaho 7-1-06	Maryland 1-1-08
Louisiana 1-1-06	Indiana 7-1-06	Massachusetts 2-3-08



Group Interaction on Solutions Deployed

- Firm/Company
- Portal/Secure Email/Concerns
- Vendor
- How Long Deployed
- Like/Dislike
- What You Would do Differently



Solutions and Features

- Secure
- Login Authentication
- Unique Dashboard
- Ability to Download Files
- Ability to **Upload** Files
- Track Access



Solutions and Features

- CCH – ProSystem fx Document – Client Portal
- TTA – ClientFlow
- TTA – NetClient CS
- Interwoven – TeamPortal
- Acct 1st Technology Group – Document Management
- DOC.IT Document Management
- Conarc – iChannel Document Management
- Compulink Management Center – Laserfiche
- CPASiteSolutions



CCH – ProSystem fx Document – Client Portal

- Client Portal – Add-on to ProSystem fx Document
- Tight Integration with Document Mgm't
- Reliable & Secure – Web Based
- Allow for Shared Communications about Specific Documents or Clients
- Flag a Read or Read/Write!
- Cabinets/Folders with Customized Names



Thompson Tax & Accounting - ClientFlow

- ClientFlow – Module in GoFileRoom
- Web-Based
- Secure
- Control Documents that Clients can Access
- Clean integration with Content Management



Thompson Tax & Accounting – NetClient CS

- NetClient CS Private Portals – CS Professional Suite
- Web-Based
- Secure
- Access and Transfer of Data
- CBS ASP – Bookkeeping Capabilities
- “All Inclusive” Web-Based Collaboration



Interwoven - TeamPortal

- TeamPortal – Connector to Interwoven's Content Management Services
- Web-Based
- Secure
- Access and Transfer of Data
- Clients can Upload Data
- Enhanced Portal Search and Personalization



Acct1st Technology Group – Document Management Software

- Focused Around Workflow Concept
- Web-Based Client Delivery
- Secure
- Easy Access and Transfer of Data
- Customizable
- Non-Proprietary



DOC.IT Document Management

- Web Client Portal Feature Recently Added
- Secure
- Control Documents that Clients can Access
- Clean integration with DM Content Management Solution



Conarc – iChannel Document Manager

- iChannel Document Manager part of Conarc's iChannel Solutions for CPA Firms
- Insurance / Real Estate / Project Mgm't
- Secure
- Publish to Private Client Extranet Site
- Control Documents that Clients can Access
- Indexing/On-Line Discussion



Compulink Management Center - Laserfiche

- Part of their Digital Document Mgm't System
- Web-Based
- Secure
- Share with clients and Enterprise-wide
- Control Documents that Clients can Access
- Compliance with SOX, HIPPA & Other Laws



CPASiteSolutions

- Secure Client Portal
- Secure File Exchange to and from clients
- Online Document Management
- Online Interactive Tax Organizer
- Online Accounting – QB
- Online Payroll



Resistance

- Not at the Client Level!
- Found within the Firm:
 - My clients have not asked for a Portal
 - My clients don't use the Internet
 - Files on the Internet – Way too Risky
 - Portal on the Internet – Not Secure!



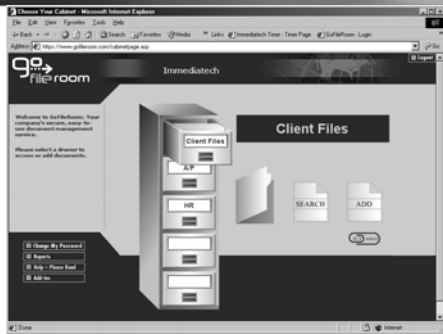
Overview WS+B's IT Philosophy

Create an Environment that Enables our Clients and Staff to Access Data 24/7 without Dependence upon In-House Technology or On-Site Support



Overview WS+B's Solution





SEARCH: CLIENT FILES

Documents 1 - 4 of 4 | Page 1 of 1

Client Name	File Name	Document Type	Description	Printed Document	Preparation Date	Last Modified	Checked
STEPHANIE FOREST, Client Number: 10075.01, Year: 2002	INDIVIDUAL TAX	TAX RETURN		3/2/02	3/2/02/2002		
	INDIVIDUAL TAX	W-2/1099		3/2/02	3/2/02/2002		
	INDIVIDUAL TAX	STATEMENTS	CREDIT CARD	3/2/02	3/2/02/2002		
	INDIVIDUAL TAX	OTHER	TAX SUMMARY	3/2/02	3/2/02/2002		



Overview WS+B's Solution

Started to think about the wealth of client information contained in DM and about how to start the process of making the database interactive with our client.

The goal will eventually be to create a tool that will be interactive with our clients and prospects. A tool that will allow for a two-way stream of data and a tool that creates a value added service.



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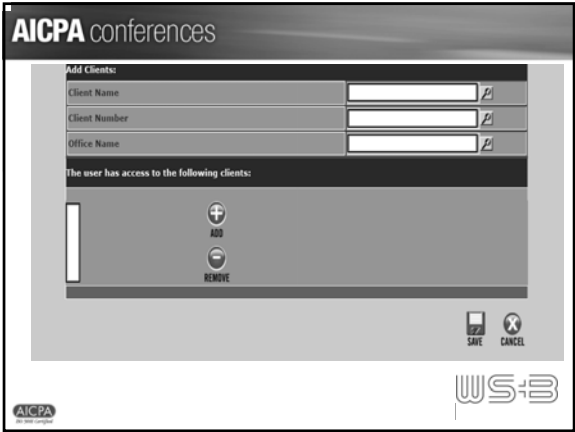
SYSTEM ADMINISTRATION

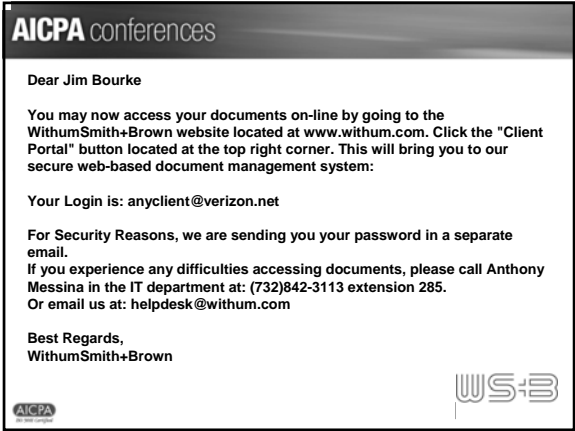
Please select the appropriate System Administration area. For a brief description of each area, mouse over the adjacent [help icon] icons.

- MANAGE USERS & GROUPS
- MANAGE FILEFOLD
- MANAGE CONFIGURATIONS
- VIEW REPORTS
- MANAGE RECORDSFLOW
- RESTRICTED DRAWER ACCESS









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Dear Jim Bourke

For Security Reasons, we are sending the **password** to access your documents separately from your Login.
For complete login instructions, please refer to the previous email - "WithumSmith+Brown Access On-Line (Part 1)".

Your password is: password100

If you experience any difficulties accessing documents, please call Anthony Messina in the IT department at: (732)842-3113 extension 285.
Or email us at: helpdesk@withum.com

Best Regards,
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To access your information, please enter your user name and password in the space provided below:

Client Login

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Password:

Login

Check Browser

Where Success Begins™



Conclusion

Key Benefits

Improve client service. Critical documents are available to clients instantly.

Improve your image. Show clients that the firm is investing in the latest internet technologies.

Improve compliance. New laws restrict emailing sensitive information (i.e., documents with SSN). Use a secure website with username/password and encryption to meet new laws and guidelines for protecting sensitive documents.

Enhanced security. Secure and encrypted access through the internet provides for greater security and confidentiality than using e-mail

Reduce printing/ mailing costs. No need to print and overnight large quantities of documents or multiple revisions of the same document

Reduce administrative costs: Reduce assembly and packing activities.

