

AAA 2005 Paperless Office Survey Results

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What is the status of the paperless office in firms today? To find out, InfoTech Partners North America, Inc. and the Association for Accounting Administration sent the following survey to more than 600 members of the Association for Accounting Administration (www.cpaadmin.org) during December 2004. More than 140 firms completed the survey with the average firm size being just over 64 members. Below, we present the AAA 2005 Paperless Office Survey findings which include the original twenty questions and responses compiled from the 2003 survey (for comparative analysis) and five **NEW** questions added in 2005.

2005 AAA Paperless Survey	Total Yes, All or Most	Total No, Some/None	2005 Yes %	2003 Yes %	% Increase
1. TAX - Does your firm utilize on-screen review for tax production?	116	26	82%	55%	27%
2. TAX - Is your firm storing a firm copy of client tax returns in a digital (PDF) format?	107	33	76%	44%	32%
3. TAX - Is the due date status of returns updated electronically by personnel in a real time format?	91	47	66%	67%	-1%
4. TAX - Is your firm scanning client supplied information for storage of tax return supporting documentation?	78	61	56%	20%	36%
5. TAX - Does your firm instruct its personnel to primarily utilize email for communicating with tax clients for additional information requests?	53	89	37%	35%	2%
(NEW) TAX - Does your firm have a policy to deliver electronic information to your clients in a secure/password protected method?	20	121	14%	NA	NA
6. AUDIT - Is your firm importing client trial balances electronically?	74	17	88%	63%	18%
7. AUDIT - Are documents prepared by clients requested in an electronic format (spreadsheet or scanned image)?	92	42	69%	46%	23%
8. AUDIT - Are all audit workpapers stored in a paperless audit application (i.e. CCH Engagement, CSI Engagement, CaseWare)?	79	56	59%	31%	28%
9. AUDIT - Is your firm producing financial statements utilizing electronic links rather than re-keying?	103	33	76%	69%	7%
10. AUDIT - Has your firm linked its audit application to its tax application to transfer information?	84	48	64%	60%	4%



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11. ADMINISTRATION - Does your firm utilize an intranet to store firm wide information (i.e. personnel manual and internal firm procedures) ?	103	38	73%	69%	4%
12. ADMINISTRATION - Does your firm deliver firm financial and management reports electronically (via email or post to intranet)?	72	68	51%	29%	22%
13. ADMINISTRATION - Does your firm have a document destruction procedure to ensure all confidential printed documents are adequately disposed of?	128	11	92%	66%	26%
(NEW) ADMINISTRATION - Does your firm have an e-document destruction procedure to ensure deletion of outdated electronic files on the network?	37	102	27%	NA	NA
14. PRACTICE MANAGEMENT - Do owners/managers receive internal management reports electronically (via email or by looking them up on the computer)?	110	32	77%	54%	23%
15. PRACTICE MANAGEMENT - Are the majority of invoices prepared onscreen (rather than using billing sheets)?	64	78	45%	39%	6%
16. PRACTICE MANAGEMENT - Does your firm maintain its contact/prospect list in its practice management or groupware application?	106	35	75%	72%	3%
17. COMMUNICATIONS - Does everyone maintain their calendar and contacts on the firm's groupware calendar system as well as respond to their own email?	128	13	91%	65%	26%
18. COMMUNICATIONS - Do all partners and managers use notebook computers?	70*	73	49%	25%	24%
19. COMMUNICATIONS - Has your firm standardized file names and directories on the network and provide training so everyone can create, save and access files effectively?	117	24	83%	84%	-1%
20. COMMUNICATIONS - Does your firm have a digital fax system that allows you to receive faxes via email and save them digitally to the network?	47	94	33%	24%	9%
(NEW) Does your firm have personnel utilizing dual monitors?	73	68	52%	NA	NA
(NEW) Does your firm deliver client invoices by email or digital fax?	43	101	30%	NA	NA
(NEW) Does your firm use a tool for firm-wide document management?	57	77	43%	NA	NA

*Note on Question 18: When asked do all partners/managers have a laptop as their only machine, 59 respondents answered "most" which would have brought the firmwide percentage up to 91%.