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Beyond FileCabinet CS: A guide to modernizing your firm's document workflow

How to plan your transition to SmartVault while keeping your UltraTax CS workflows moving

FileCabinet CS has been part of your firm's document management process for years. Moving to a new system is about more than finding another place to store files. It's about preserving access to important client records, maintaining the workflows your team depends on, and preparing for what's next.

With FileCabinet CS scheduled to reach end of life on **December 31, 2027**, now is the time to start planning your next step.

The transition also presents an opportunity to rethink how your firm collects, organizes, delivers, and manages client documents—and to reduce the manual work that can slow your team down.

This guide will help you evaluate your current process, prepare for migration, and understand how SmartVault can support a more connected document workflow around UltraTax CS.

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1. Start planning before the deadline

The end-of-life date may seem far away, but a successful transition takes more than choosing a replacement system. Your firm will need time to evaluate its needs, plan the migration, test critical workflows, and prepare employees for the change.

Waiting too long can limit your options for scheduling the transition around tax season and other busy periods.

A few questions to consider now:

- What information and historical records must remain accessible?
- Which document management processes are essential to daily operations?
- Which systems and integrations does your firm rely on?
- When could your team realistically make a transition?
- What would help employees and clients adapt to a new process?

Starting with these questions gives your firm a clearer picture of the work ahead—and helps you make decisions on your own timeline.

2. Look beyond storage when evaluating your options

Replacing FileCabinet CS doesn't have to mean recreating the same process in a different system.

For many firms, document management touches nearly every stage of the tax workflow. Documents must be collected from clients, organized for preparation, routed after returns are completed, delivered securely, signed, and retained for future reference.

When these steps rely on separate tools or manual work, the process can become unnecessarily complicated.

Consider the full document workflow

01

Collect

Give clients a structured way to submit documents rather than relying on email attachments and repeated follow-ups.

02

Organize

Keep client documents organized and accessible so your team can spend less time searching for information.

03

Route

Reduce repetitive filing tasks by connecting document routing with your UltraTax CS workflow.

04

Deliver and sign

Help clients access documents and complete signature steps through a more connected process.

05

Archive

Maintain organized records that your team can retrieve when questions arise or historical documents are needed.

The goal is to make document management work as a connected process—not a series of disconnected tasks.

3. Keep UltraTax CS while modernizing the workflow around it

Changing document management systems doesn't necessarily mean changing your tax preparation software.

SmartVault integrates with UltraTax CS to help firms connect document management with their existing tax preparation workflows.

With **SmartRouting**, teams can print from UltraTax CS and automatically route supported documents to the appropriate locations, reducing repetitive saving and filing tasks.

SmartVault also brings together document management, a branded client portal, document requests, and supported eSignature workflows.

Depending on your firm's needs and configuration, these capabilities can help reduce the number of separate steps and tools involved in managing client documents.

> **The opportunity:** Keep the tax preparation workflow your firm relies on while improving what happens before and after the return is prepared.

4. Prepare for migration with a clear plan

One of the biggest concerns when changing document management systems is making sure important records remain accessible and employees can continue working effectively.

The best way to approach migration is to understand your firm's requirements before the transition begins.

Your migration readiness checklist

Know your records

- Identify the client records, tax years, and historical documents you need to retain.
- Review your current folder structures and document organization.
- Identify archived and inactive client records that may need to be migrated.
- Determine whether any records require special handling.

Understand your workflows

- Document how employees save, retrieve, route, and share documents today.
- Identify integrations and processes that must continue working.
- Review how clients currently submit documents and receive completed returns.
- Determine how signatures and approvals are handled.

Plan your transition

- Discuss migration options and requirements with SmartVault.
- Confirm what data and metadata can be transferred.
- Establish how the completeness and accuracy of migrated records will be verified.
- Choose a realistic timeline that accounts for tax season.
- Determine what training and support employees will need.
- Confirm how legacy records will remain accessible and how retention requirements will be met.

Migration requirements vary by firm, so confirm the process, scope, timing, and responsibilities with your migration provider before finalizing a plan.

5. Make the transition easier on your team

A new document management system affects more than your technology. It changes how employees complete familiar tasks and how clients interact with your firm.

Planning for adoption early can help reduce uncertainty and make the transition smoother.

Give employees time to prepare.

Identify the tasks employees perform most often and prioritize training around those workflows.

Test critical processes before launch.

Verify that employees can find historical records, manage documents, and complete essential workflows in the new system.

Communicate changes to clients.

If clients will use a new portal or document submission process, explain what is changing, why it matters, and what they need to do.

Allow time to resolve issues.

Build time into your migration plan for testing, corrections, and questions before relying on the new system for critical daily work.

A successful transition is not just about moving files. It’s about making sure your team can continue serving clients confidently.

6. Use the opportunity to improve how your firm works

As you evaluate a replacement for FileCabinet CS, consider which parts of your current process you want to keep—and which you’d like to improve.

Ask yourself:

- Could we spend less time manually saving and organizing documents?
- Could clients submit documents without relying on email attachments?
- Could we simplify the way completed returns are delivered and signed?
- Could we reduce the number of tools involved in our document workflow?
- Could we make it easier for employees to find and access historical records?
- Could our document management process better support the firm’s future growth?

You don’t have to change everything at once. Focus first on the capabilities your firm needs for a successful transition, then prioritize additional improvements.

With SmartVault, your firm can evaluate a cloud-based document management environment designed to support the workflows surrounding UltraTax CS, including document routing, client collaboration, and archiving.

Your next step:

Make a plan for your firm's transition

The FileCabinet CS sunset creates a deadline, but it also creates an opportunity to take a fresh look at how your firm manages documents.

By starting early, identifying your requirements, and planning around your team's needs, you can approach the transition with greater clarity and avoid leaving important decisions until the last minute.

Rightworks can help you explore SmartVault as your next step.

Connect with your Rightworks Account Manager to discuss your current document management setup, evaluate your workflow needs, and learn more about a structured migration plan from FileCabinet CS to SmartVault in the Rightworks environment.

Start planning your move today

