

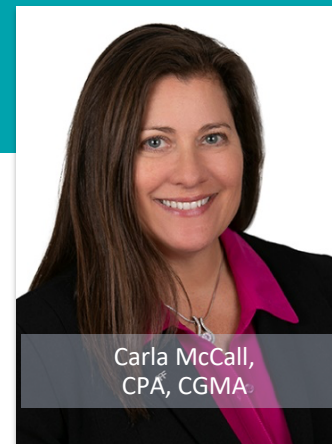
AAFCPAs Signs on with Diligence to Power the Digital Firm[®]

Streamlining operations by digitizing processes and automating routine tasks.

AAFCPAs, a leading CPA and Consulting firm based in New England, signs on with Diligence, a cloud-based software platform that helps accounting firms digitize processes, automate repetitive tasks, and modernize firm delivery.

The platform uses artificial intelligence, machine learning, automation, and intelligent document processing, and fully integrates with legacy systems.

“AAFCPAs remains committed to innovation and working smarter,” said [Carla McCall, CPA, CGMA, AAFCPAs’ Managing Partner](#). “We continue to invest in tools and skills development to enable productivity and to engage our team members with higher value work.”



Carla McCall,
CPA, CGMA

774.512.4049
cmccall@aafcpa.com

AAFCPAs Releases Tax Returns Using Diligence Automation

What have we gained?

AAFCPAs introduced the Diligence subscription platform in September 2021. As part our Diligence roadmap, we utilize their “Last-Mile Tax” product to automate the manual steps to validate signed tax returns (8879s) and e-release the following returns: 1120, 1120S, 1040, 1041, 1065. We experienced the following benefits:

- Diligence successfully integrates with our software critical to our tax return workflow process, including CCH Access and e-File system, our XCM workflow platform, SafeSend Returns™, and our email inbox.
- Diligence syncs with SafeSend Returns™ and XCM hourly to identify returns ready for validation and filing. Diligence AI examines all pages and deliverables (8879s, State forms, FBARs, etc.) for issues and provides an “Exception Report” that identifies errors, such as lack of signature verification and state form mismatch. This provides opportunities to enhance procedures and data quality in our systems.
- Diligence automatically releases returns within our e-File system. On deadline day, the release frequency is increased. Once released, it updates the XCM task to “E-file - Awaiting Government Acceptance.” Through automation, Diligence monitors the Government’s site to confirm the return has been accepted and then moves the XCM task to “Completed”, and separately manages workflow for rejected returns.
- **Diligence increased our firm’s processing speed, and significant staff time has been reclaimed as our team members now only focus on exceptions. We eliminated significant overtime hours that were typical of previous deadlines and elevated our teams brain power to more meaningful work.**

What’s next?

Our journey with Diligence advances as we add more “digital intelligence” with Diligence document management and electronic engagement letters. We’re collaborating to broaden the scope of returns they handle, and we’re also exploring opportunities across various areas within the firm where we may leverage the broader Diligence Cloud Platform, potentially phasing out other systems.



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