



Ohio Chapter Meeting

Friday, May 17, 2019

Ohio Society of Certified Public Accountants
Columbus, Ohio

The following members were in attendance:

Tim Bub	Newman & Company, CPAs	Cleveland, Ohio
Tammy Boring	Snyder & Company	Lancaster, Ohio
Leisha Rospert	Payne, Nickles & Company	Norwalk, Ohio
Sarah Galley	Pohlman & Talmage CPAs	Dayton, Ohio
Michelle Holmes	Martinet Recchia Inc	Willoughby, Ohio
Lori Ellinger	Kirsch CPA Group, LLC	Oxford, Ohio
Stefanie Marusiak	Bober Markey Fedorovich	Akron, Ohio
Sarah Sanders	Rudler, PSC	Ft Wright, KY
Angela Klosterman	Thorn, Lewis & Duncan	Dayton, Ohio
Jennifer Plummer	Whitcomb & Hess	Ashland, Ohio

Presentation

“The Good the Bad and the Ugly of Tax Season 2019”

Business Meeting

Leisha Rospert, Ohio Chapter President opened the business meeting.

The minutes from the February meeting as posted were approved. If you have any changes, contact Michelle Holmes, Chapter Secretary.

Tammy Boring, Chapter Treasurer, reviewed the treasurer’s report and it was approved as submitted.

Tim Bub, Chapter Vice-President, shared the Chapter’s membership report. The chapter gained one new member. Tim welcomed the new member.

Leisha reminded chapter members of the National Conference:

2019 CPA Firm Management Association's National Practice Management Conference in
partnership with AICPA ENGAGE
June 9 - 13, 2019
Las Vegas, Nevada

Save with promo code **ENG19CPAFMA**

The 2020 CPA Firm Management Association Conference will be in Sarasota, Florida.

Leisha reminded that the Ohio chapter has a conference scholarship. The 2019 scholarship has been awarded to Jeremy Raines. Jeremy will come back and report on his experience at the conference.

Sarah Galley, Chapter Program Chair, reviewed the upcoming meeting dates and other tentative program topics for 2019:

July 19, 2019

“Do and Don’ts of Critical Human Resource Functions” Part II

Presented by:

Jeffrey J. Patter, Managing Partner, Carlille Patchen & Murphy, LLP

September 20, 2019

TBD

Leisha and Sarah announced that the Ohio Chapter is seeking nominations for board members. If you have an interest in serving on the board for any of the positions listed below please email Sarah Galley at sarahg@PTBC-CPAS.com.

CPAFMA Ohio Chapter Round Table –

Processes -

- Who organizes 1040 source documents for scanning?
 - Ranges from a very experienced admin person to include Firm Admins, the preparer or client manager (CPA)
- Who scans 1040 source documents for workpapers (assuming you are paperless)
 - Receptionist or dedicated scan admin
- Who prepares the 1040 returns – CPA, accountant (non-CPA), bookkeeper, administrative
 - Non-CPA and CPA -some firms rate returns and assigned by rating.
- Deadline for clients bringing in information.
 - March 20th or end of March or April 1st. Rudler's firm did well at sticking to their deadline date. New President offered incentives and really held to their deadline. Firms communicated their date in their tax organizer letter, engagement letter and then some did a separate reminder type email.
- Summary who completes. Interns?
 - CM gives them a excel spreadsheet, so client completes it for next year or preparer does it and completes a change order or bills for the time.
- Who is contacting client initially for data – PIC, staff?
 - For business clients usually, it is that relationship manager. For individuals the preparers do sometimes or the relationship person.
- Anyone use the complexity ratings in UT?
 - Michelle's firm does a little, but most are rated by Partner on that account.
- Steps in a workflow to track efiles –
 - Tammy uses a separate step in their firm flow workflow that doesn't get completed until acknowledgements come through. A few others track using Practice Projects or there are events in Ultra Tax that can be used to track.

Staffing-

- Average hours staff are working during tax season (admin, accountants & partners)
 - Sunday approved at Rudler and Tammy's office really doesn't work on Sundays either Mid-January start at least 4 – 5 hours week OT. Reviewers start mid Feb. Understood going to stagger who is worker longer hours first based on workload. Lori Ellinger's firm says Salary based on 2250. Rudler said they have a 12-hour max per day another firm said they are wanting to look at having a max and min. Allowing employees to work remotely helps and the fact that you trust them they are more productive.
- Remote employees -
 - Most of the firms have a remote employee. Remote employees check in with other staff just to say hey I am here to help if you have questions to help foster a relationship with them and the employees in the firm. Some remote employees do training via skype or zoom to help include them.
- What type of video and screensharing are you using with remote employees –
 - Teams and Zoom –zoom use video conferencing – free version and pro version.

- Flexibility/working hours-
 - complete flex time – Core hours 9-4, Most firms seem to be flexible on their schedules with staff. Calendars must be updated but does not need to be ran by management each time. Try to be flexible do to stuff always going on with schools, kids being ill, etc. If someone is leaving early unexpectedly as a courtesy, they will mention it to someone and update their calendar.
- Training/onboarding –
 - This seems like a frustration across the board. We are going to try to have Jim Fahey speak at a chapter meeting on training.
- Extensions-
 - Across the board on how these are prepared. There is a firm admin that prepares them all, another firm has the inters help with this, Client Managers prepare. However, all firms consistently seem to have one person file the extension.
- Interns-
 - What do they do at your firm – extensions, some do admin some don't. if really like keep during summer for admin projects and whatever work they can do sometimes no work and they must ask for work but that is ok because it keeps them in the firm. Interns that are retained continue to grow each year and their "level" increases each year which is how work is assigned. Michelle's firm has interns prepare 1099s. Sarah's firm has interns do the verification for autoflow their first year.
 - Interns are provided Group training –then practice return training. All feel like it could be better. Some give intern a buddy. Interns start early to mid -January – Leisha does training in December.
 - The majority seemed to have interns working 40 hours. A couple firms had interns still in classes and working 25 hours. Most interns aren't working over 40. There was one firm that said their interns work just like a preparer, so they were working over 40.
 - Hiring interns – Firms attend the college meet and greets and have a good relationship with the dept. head of the accounting department of local colleges. Michelle does an open house where they meet staff, interview partners (managers), firm overview, talk to other interns hired. And then they are rated by all staff involved and that is how they determine who to make offers to. Michelle did the same thing for seasonal preparers. Smaller colleges were also a suggestion to put more time into the small colleges and community colleges.

Delivery/payments Tax Return –

- Paper copy of returns – do you charge a fee for 1040 paper copy vs no fee for electric copy of returns? How much? Is anyone tracking how many paper vs. electronic?
 - No to all the above
- Did clients complain when you switched to having a paper copy fee?
 - N/A because no one had a fee
- Electronic Delivery of returns to clients- how are you getting them to the client?
 - Sharefile and Portals
- Clients paying balance due and estimates via ACH
 - Not many returns are doing this. Tammy said they are pushing all their clients in this direction. Sarah's firm had one Client Manager that had most of her clients pay balance

due via ACH. Loved it!!! Estimates however we didn't because in the tax software you can change the amount mid-year on estimates that are being ACH'd.

- Invoice with the tax return?
 - Tammy's firm had monthly and Quarterly go to ACH for payment of their invoices. The others received 4 options for 1040 – Credit Card and pay 3% fee, bring check to pick up, set up ACH, check when drop off data. Hardly no push back. A few other firms added 3% if client paying by credit card and they felt cc payments dropped a lot. Most are not putting an invoice with the tax return.
- Safe send –
 - didn't cover a lot of cities so still had to send paper to some. Sounds like the 2 firms using it like it. There may be a buy in issue as with all applications to get the Partner's and Client Managers to help push the product.

Client Portals-

- Do you use and for what?
 - Firms are using portals to send and receive documents.
- What Portal/software do you use
 - Thomson's portal, ShareFile as a portal, CCH portal
 - Clients perspective – sounds like all the portals come with their own set of issues. Temperamental based on browser, type of computer etc. Registration emails not being received.

Software/hardware-

- Software used for workpapers of 1040's
 - Adobe PDF, CCH Scan product, SurePrep, Workpapers CS
- Thomson products what is next? Specifically, A&A. Onvio?
 - Advance Flow – seems to be confusion within Thomson about what size firm should be on Advance Flow
 - A few firms use CCH engagement
 - Thomson Onvio? – Again, seems to be confusion on what size firm should be on this and what this product actually is.
- How many monitors and size?
 - 3 -4 monitors. 4 monitors are set in a quad view or 2 landscape and 2 portrait going side by side. One firm was going to like 27-inch monitors and splitting the screens due to space.
- All laptops?
 - 2 firms were all laptops but the majority still have desktop computers. We did talk about leaning towards laptops when upgrading because of the remote work.

Fun-

- End of tax season celebration. What is everyone doing?
 - Food, going out to eat for drinks and to eat. Two firms close at noon on the 15th and go to lunch and have drinks etc.... Most firms are employees only at this event. Another firm goes bowling.

- Office Vibe –
 - Denise is going to get us info on this. It is a quick survey to gauge office climate that goes out every 2-3 weeks.
- Allocation of work/feedback for performance reviews
 - To help with feedback Leisha's firm has a weekly meeting where the Client Managers go over staff and workload so that the manager can provide feedback to that staff member. Firms are also having meetings where they meet with the employees individually on a more regular basis to provide feedback and receive feedback.
 - Really didn't have any performance review software except Paycom. Leisha mentioned they use the Keep, Start, Stop method which has worked well. Here is a link to an article about this method.
<https://www.journalofaccountancy.com/newsletters/2016/feb/firms-better-develop-people.html>
- Ideas for Staff Motivation –
 - Rudler talked about how they get reports on goals that are set up and the progress. Staff likes to see the status and that things are getting done. Tammy's firm did something similar with a chart for each preparer and a loud bell that rang when a return went out the door. Next year however they will not put names on the chart.
 - Star of the week – nominate someone to be star of the week if they are caught doing something good
 - Sticker board – year a round stickers for meeting goals, caught doing something good and then once you hit so many stickers you can trade them in for firm swag
 - Happy hours- Firms do happy hours or a few firms closed at noon for like the first day of final four so people could just go chill.
 - Process board – tick mark and then a noise
 - Tax buddy – like a secret Santa not required though so hopefully only the people that really participate show up
 - Get everyone home for dinner for people still worked late so bought gift cards at end season
 - \$100 bill at tax party to everyone or another firm has a \$100 bill show up on their desk in March
 - Chair massages
 - Flex schedules/working remote