Ohio Chapter Meeting

Friday, May 18, 2018
Ohio Society of Certified Public Accountants
Columbus, Ohio

The following members were in attendance:

Tammy Boring	Snyder & Company	Lancaster, Ohio
Sarah Galley	Pohlman & Talmadge	Dayton, Ohio
Leisha Rospert	Payne, Nickles & Company	Norwalk, Ohio
Kathy Pool	Rudler, PSC	Bridgeport, WV
Samantha VanArnhem	Corrigan Krause	Westlake, Ohio
Sarah Sanders	Rudler, PSC	Fort Wright, KY
Michelle Holmes	Martinet Recchia	Willoughby, Ohio
Tim Bub	Newman & Company	Cleveland, Ohio
Mary Steele	Oles & Associates	Columbus, Ohio
Angela Klosterman	Thorn, Lewis & Duncan	Dayton, Ohio
Cara Knechtly	Woomer Nisetendirk & Assoc	Charleston, WV

Presentation

"The Good, The Bad and The Ugly of Tax Season 2018" – facilitated roundtable discussion

Business Meeting

Leisha Rospert, Ohio Chapter President opened the business meeting.

The minutes from the February meeting as posted on the website 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.

Sarah Galley, Chapter Program Chair, reviewed the upcoming meeting dates, mark your calendars:

July 2018 "Freedom to Fail" Kristen Rampe, CPA, Owner Kristen Rampe Consulting

Leisha Rospert reminded the chapter of the CPAFMA National Conference for 2018 in partnership with AICPA.

2018 CPA Firm Management Association's National Practice Management Conference in partnership with AICPA ENGAGE
June 11 - 14, 2018 in Las Vegas, Nevada

Leisha announced this year's recipient for the Ohio Chapter scholarship is Sarah Sanders from Rudler, PSC. Congratulations to Sarah!

The Good, The Bad and The Ugly Topics:

Organize/Assign/Process Returns

1. Anyone using SurePrep's TaxCaddy, 1040Scan and SPbinder software for 1040's.
2. How does everyone summarize source documents for 1040s in order to double check your work (particularly Sch C & E)?
3. How does everyone assign work? Pre-assign, assign as it comes in or staff pulls work as they are available? Do block off times for large client work to come in & be worked on?
4. Checklists - everyone use a canned one or create your own?
5. Do you have a date info needs to be in by to guarantee returns are not extended?

Estimates

6. Estimates - does everyone give the client envelopes & do you send them some sort of reminder each quarter? Does anyone file/pay them using EFTPS?
7. Do you call cities and states for estimate pmt verification or do you take clients word?

E-Filing

8. Who e-files your returns & do they cross check anything before submitting?
9. E-filing – new procedures

Packaging/Delivery

10. How do other firms handle electronic delivery of returns?
    a. Mandatory? (with exceptions of course!)
    b. How/when do you inform clients of the move to deliver electronically?
    c. Sample letter of wording to inform clients of electronic being preferred method of delivery
    d. Client reaction to mandatory electronic delivery?
    e. How do you present the "deliverables/action items, 8879s"?
    f. How do you return the clients original documents?
    g. Presentation folders? Supplier and types.
11. Does anyone deliver business returns electronically?
    a. How do you handle the access?
    b. One email per Net Client Portal? Bookkeeper email versus partner email?
    c. Cities not e-filed?
    d. K-1's

Staffing

12. Admin OT hours – what is normal?
    a. Admin pay? Anyone willing to share?

13. Any new ideas for "fun" during tax season?
14. Any new stress reliever's people used that worked?
15. Ice breaker ideas to get staff to "know" each other better?
16. Team building activities?
17. After tax season bonuses….determination of $; timing?
18. Interns – how do you use them?

<u>Non-Tax Misc</u>.

19. Wealth Management
    a. For those firms who offer this service….were clients reluctant in changing current advisor/broker?
20. How do you maintain client information such as log in info, bank acct info etc.
21. Are firms doing tax planning this summer for changes in tax act?