



## **Ohio Chapter Meeting**

May 20, 2022

Virtual Meeting

### **The following members attended via ZOOM:**

Tammy	Boring	Snyder & Company
Debra	Clouse	HW&Co.
Maureen	Compton	Oles + Associates
Amy	Enzweiler	Scrogginsgear
Tom	Fadeley	Ciuni & Panichi, Inc.
Margaret	Gothot	Tax & Wealth Management Inc
Michelle	Holmes	Martinet Recchia Inc
Patti	Ianni	HW&Co
Rita	Keller	Keller Advisors, LLC
Jeremy	Raines	Dean Dorton
Leisha	Rospert	Payne Nickles & Company
Sarah	Sanders	Rudler, PSC
Thomas	Thomas	Accounting Practice Sales
Kayleigh	Delaet	CPAFMA

### **Business Meeting**

Michelle Holmes, Ohio Chapter Vice President opened the business meeting.

The minutes from the October meeting as posted were approved. If you have any changes, contact Patti Ianni, Chapter Secretary.

Michelle Holmes, Chapter Vice President reported there were no new members to the chapter

Michelle Holmes reported that we are still in need of a Program Chair and a Secretary. Michelle notified all attendees of the vacant position and invited all to reach out to her or any board member if they were interested in serving on the board for the 2022/2023 year.

CPAFMA Ohio Chapter Board for the 2023 year to put to vote are:

Michelle Holmes- President

Patti Ianni- Vice President

Tammy Boring- Treasurer

Secretary- OPEN

Program Chair-OPEN

Michelle Holmes confirmed the dates for the 2022 meetings

July 15, 2022- Speaker Jeffrey Patter, Ulmer and Berne on HR

September 16, 2022

Michelle Holmes reminded all that the 2022 CPAFMA Practice Management Conference will be held solo for 2022 in Portland, Maine from June 21-24, 2022. The national conference will also be virtual via zoom, contact CPAFMA for further information.

Meeting concluded.

## **Roundtable and discussion items feedback following business meeting**

Safe send

- Firms who used and clients liked it, clients were receptive and ease of use helped. Safe send has made many improvements- they have an organizer which still requires some changed, clients did like completing the organizers electronically. City returns still an issue- firms sending paper city returns.

GFR- Thompson portals

- Drawback does directly integrate with programs. Firms use staff to upload 8879's
- GFR and MFA issues- screen size was an issue with authentication.

Firms looking at replacements for organizers, Tax Caddy one option.

Are firms switching from CCH onsite to web based? Feedback was it was more hassle that is was worth. CCH did not support the change well. Reporting in Pro system better than access. Very difficult conversion, pricey. This is very driven for project based billing system, you need to have projects created for everything.

### Remote faxing software

- Jeremy Raines of Dean Dorton uses GFI fax maker for email faxes.

[www.gfi.com/products-and-solutions/email-and-messaging-solutions/gfi-faxmaker](http://www.gfi.com/products-and-solutions/email-and-messaging-solutions/gfi-faxmaker)

Calyx- I cloud vendor- one firm using

Ultra Tax users- multiple firms using

Thompson workpapers-

- Accounting and bookkeeping side used by many. When scanning for 1040's information is not pulled accurately – feedback very slow.
- Many issues with Ohio cities.

Staffing- hours requirements? 2200-2300. Remote work policies will be shared with link to meeting. Firms are holding daily or weekly huddles to increase/assist staff engagement.

Firms using handshake and paro for staffing needs.

One firm closes for half day for 6 Friday's in summer. Rita Keller said trend is to close on Fridays in summer and is a great recruiting tool.