



Ohio Chapter Meeting
July 17, 2020
Virtual Meeting

The following members attended via GoToMeeting:

Michelle Holmes	Martinet Recchia Inc	Willoughby, Ohio
Stefanie Marusiak	Bober Markey Fedorovich	Akron, Ohio
Jennifer Plummer	Whitcomb & Hess, Inc	Ashland, Ohio
Patti Ianni	HW&Co.	Cleveland, Ohio
Sarah Sanders	Rudler, PSC	Ft Wright, KY
Leisha Rospert	Payne, Nickles & Company	Norwalk, Ohio
Sarah Galley	Pohlman, Talmage, Brown & Ca...	Dayton, Ohio
Tammy Boring	Snyder & Company	Lancaster, Ohio
Robin Ott	Ciuni & Panichi, Inc	Beachwood, Ohio
J.D. Hurley	McClintock & Associates	Bridgeville, PA
Cara Knechtly	Woomer Nistendirk & Associates	Charleston, WV
Lori Ellinger	Kirsch CPA Group, LLC	Oxford, Ohio
Rita Keller	Keller Advisors, LLC	Beavercreek
Amber McAuliffe	The Ohio Society of CPAS	Columbus, Ohio
Alan Long	Baldwin CPAs	Richmond, KY
Cynthia Arcuri	Louis Plung & Co LLP	Pittsburgh, PA
Robert Palmer	MCM CPAs and Advisors	Cincinnati, OH
Tom Fadeley	Ciuni & Panichi Inc	Beachwood, OH

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 Patti Ianni, Chapter Secretary.

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

Michelle Holmes, Chapter Vice-President, reported there was one new member to the chapter. Louis Plung of Louis Plung & Co. CPAs in Pittsburgh, PA. Welcome!

Sarah Galley, Program Chair, shared the date for the remaining 2020 Ohio Chapter meeting:

September 18

Sarah Galley will poll the attendees at this meeting to determine whether virtual meetings are a good choice for our group. Go to meeting had a few glitches with connectivity and sound quality at beginning of meeting. Robin Ott of Ciuni and Panichi volunteered to host a Zoom meeting for our September meeting.

Rita Keller will check with National CPAFMA to confirm 2020 Conference is cancelled

Sharon Trabbic emailed that she retired June 30, 2020. The Ohio Chapter of the CPAFMA will personally miss her and will be formally recognizing her retirement.

Presentation/Roundtable

“The Good, The Bad, The Ugly of Busy Season!”

Facilitated by:

Sarah Galley
PTBC-CPAs
Dayton, OH

Interns

1. Do you have interns do anything other than prepare tax returns?
 - a. Enter 1099 data
 - b. Assist with extensions
 - c. Sure Prep Verification
 - d. A&A and cost reporting for Healthcare dept.
2. How do you train your interns?
 - a. 3 day training on all items that would apply to them for tax season to include the HR orientation.
 - b. 2 week training – Go through software, HR , all departments and everything they need to know for the season.
3. What do you find with new hires that they are catching on to quickly or not catching onto quickly?
 - a. Newer staff seems to be more advanced with technology. They just seem to get it.
 - b. Newer staff tends to ask more why questions instead of just taking instruction of if you see this do this.
 - c. Newer staff seem to struggle with the basics such as a bank rec.
 - d. Younger staff seem to rely on the technology more. They are lacking analytical skills.
 - e. Lack of critical thinking skills. Critical thinking initiative in Michelle’s firm. How do you teach this? They are actually having them write out what was different from last months financials compared to this months, what stood out.
 - f. Onboarding tips and tricks takes about 2-4 hours but it goes over what should be documented and how to save it. Banks recs etc...
4. What did you supply for your staff? Laptops? Monitors? Scanners? If your staff has laptops do they have a docking station in the office or a desktop?
 - a. Provide 2 monitors most have laptops and then provide a docking station at home and at the office and also in some conference or empty office areas so they can plug in as needed.
 - b. Took monitors home. All have laptops and docking stations. If employee is a permanent remote an all in one machine is supplied to the.
 - c. \$500 given to all new hires to help setup their home office
 - d. Employees moved their work area from the office to their home.
 - e. Slowness on a laptop has not been an issue with UT or other applications
5. For those that allow printing how do you ensure security? What is being printed?

- a. Policy states must keep secure so employee shreds or brings to office to shred.
 - b. Many had a no print policy . No need to with everything paperless. Admin is available to scan everything into the network.
 - c. Pushed AP clients to bill.com
6. What didn't work well with the new remote environment?
- a. Going through tax data initially when scanned into the network vs. having the paper to flip through to determine what should or should not be scanned. Some firms trained receptionist or scanner to know what to scan and what not to scan. Others scan everything and deal with it at the preparation level . Would rather have the data than be missing data because it wasn't scanned.
 - b. Productivity issues in the beginning from those that weren't normally used to working remote. Better now as people have adjusted or started coming back to the office.
 - c. Training of staff- Just need to do a better job training virtually
 - d. Encouraged communication, picking up the phone to talk with each other and ask questions to feel more connected.
 - e. Held team meetings virtually and encouraged the use of virtual meeting that really facilitated training and interaction in the firm.
7. When employees are remote are they expected to be clocked in and working from 8-5 or are you a little more flexible?
- a. Flexible to allow people to juggle. They had to be logged in for meetings, they have to get their work done and meet their goals. As long as they are doing this then all is good. This took awhile to get everyone on board with this. You have to give and gain trust with the employees.
 - b. Ask that people communicate well and keep a consistent schedule that allows them to be available to help others and receive help from others. Keep calendar updated.
 - c. Core hours – employees expected to be available during these hours to assist co-workers and clients. Other than the core hours they just need to get their work done.
 - d. Core hours 9-4 for a few firms
 - e. Make sure keep calendar and in/out board updated so people know when you are available.
8. Has anyone had to close their office due to Covid-19?
- a. One firm had to close one of their smaller offices. They were shut down for 2 weeks. They did a more thorough cleaning before coming back to the office. The office already had wipes and supplies for the normal cleaning and wiping down of stuff. Employees in that office were all tested. All others came back negative. A benefit is that there wasn't any cube settings. In this office they are all in offices.
9. Has anyone had individuals refuse to wear a mask?
- a. 3 employees are being very difficult about masks. Trying to keep them secluded from others so it is a non-issue.
 - b. One person but trying to keep them secluded as well.
10. Hiring
- a. 2 firms discussed how they were able to fill Sr. Manager positions during this time because of the layoffs. Both found managers from large national firms that made cuts. Might be a good time to start looking for these types of positions again.
11. What type of phone system do you use? How were calls handled during Covid-19?

- a. Firm uses Teams. They imported all their numbers into Microsoft and now all incoming and outgoing calls are made via Teams. So essentially your computer or your cell phone is your phone. As long as you have the app on your cell phone. Calls look like they are coming from the office . They are pushing and encouraging everyone to use direct dial phone numbers as well. There is still an office number and that rings to Ruby Connect and a live person answers the phone and then transfers to the correct employee. Employees also receive voicemail in email so if they aren't available but someone else can assist they just forward that email on. Do not cover a portion of employees cell phone while in Covid. It is just an app they are using on the phone so no need. Many don't even want headsets, they prefer to use their own earbuds.
 - b. Complete Voip system but still have a receptionist to answer phones. Phones were forwarded to peoples cell phone.
 - c. No one else really said if they have a VOIP system they are happy with.
 - d. Phone system is Ipecs which is an LG system through ProOncall Technologies. This allows for the use of old telephone lines or VOIP. It is a hybrid. So as we go more internet we can build out and add more VOIP slots. Partners hesitant to go all VOIP still. This system has all of the new technology though so voicemail goes to email, you can forward, the admin panel allows firmadmin to do a lot. System also has a cell phone app that allows you to make and receive calls as if you were in the office.
12. ESignature Solution this year was RightSignature? What did others use? Anyone use Safe Send?
- a. Lori and Sarah (Rudler Cpas) used safe send and Alan moving to SafeSend. There were a few issues with the KBA questions but not a lot. Overall good experience. When there is a return that needs to be paper filed you can move it into the Safe Send envelope but the client needs to print the pdf to send. Rudler prints and just mails the paper packages. If the KBA fails in safesend the client is given the option to print the 8879, sign and send in.
 - b. Ultra Tax signature had a problem with specific email domains. You just couldn't send to them which created a lot of issues. UT is aware of the issue but could not fix it during busy season.
13. Audit Software now that workpapers CS going away?
- a. Advance Flow works well, staff likes it. Preview button is no longer there but should be there by the end of the year. Should also be Chrome compatible by then.
 - b. CCH software used by Rudler – send contact person to Michelle. Let Sarah with Rudler know if anyone else is interested.
14. What are you using for CPE Tracking and who tracks?
- a. Ohio Society spoke at one point of creating a module but we have not heard anything additional on this.
 - b. NASBE has a tracking software but your state board has to turn it on. Available in Ohio and one firm encourages their CPAs to utilize it and save their certificates there.
 - c. CE manager is an application that might cost a little more but tracks cpe, houses certificates and learning plans can be incorporated into this software. Has a lot of capabilities.
 - d. Checkpoint learning tracks the courses and houses certificates. Sends email reminders to the CPA of what is still needed for the year. Pretty easy to use and costs around \$240.

Not sure if there is a learning track that you can incorporate into the application. No one has dug into it that much.

15. Who has a flex spending plan ? How much staff participation/do you see the value as a firm?
 - a. A number of firms have them but have seen a decrease in use due to Health Savings Accounts. No one really said they are doing away with it but that it was definitely not being utilized like they used to be.
 - b. One firm said that there was a big benefit for the dependent care portion for young families and found value in offering that and providing to their employees. It is primarily on the employees to track and turn in receipts. Their payroll provider administers the plan.
16. Sharepoint, who has it and uses it and what do you use it for?
 - a. I missed a lot of this conversation dealing with dogs....sorry. I believe Patti and Alan have it and use it successfully if you have additional questions.
 - b. Alan and Patti used consultants to help set up. Wendel Wilson Consulting 859-625-1100 was Alan's consultant.
 - c. Hard to set up and keep up to date but Alan and Patti both felt that it was a good resource and tool. Especially for an intranet, less emails and the announcement is the same to all.
 - d. If you use the file section in teams then these files all upload to Sharepoint as well. Great capability if set up right.
17. Are you using a system to train new employees?
 - a. Utilize face to face more individualized training.
 - b. Assigned a coach during Covid that they were required to check in every day. This gave the employee support of someone to go to when they had questions or needed help.