happen to ensure you are delivering a high quality product or service to your customers. This is especially true for payroll practitioners just starting out.

As you gear up for your first filing season, now is the time to make sure you have everything you and your staff will need to effectively and efficiently serve your clients.  Double-check your resources to make sure you have enough staff on board, as well as the most updated software and correct forms.

First, you want to be sure that you fully understand the scope of your new payroll business. This means understanding each client's unique business needs and knowing the personalized level of service you'll have to provide. Examine your list of clients and create a database to manage filing requirements, deadlines and required documents for each client. Review the master schedule with your staff to ensure they are also aware of important dates and compliancy requirements for every client they will be working with.

Constant and open communication is also key to preparing for your first filing season. Schedule time to meet with each client, preferably face-to-face. Use these meetings to discuss your client's needs and expectations, as well as your own expectations. Make sure they are aware of important deadlines and filing requirements. If there are important documents that they will need to provide, this is the time to discuss.

New laws will typically go into effective January 1, so now is the time to make sure you are fully aware of any changes that will affect your clients. If there are new requirements or filings, ensure they are aware of them and start planning to gather the necessary data and information that you will need to file.

Once you have put together a master schedule of deadlines and made a list of the required filings for each client, you will have a true picture of the work that lies ahead for your first filing season. Carefully assess how much time would be needed to



process and any steps they need to take.

Keep in mind that even the best-laid plans will not be perfect. Inevitably, issues will arise. Create a process to handle any issues that occur during filing, such as misfilings, incorrect information or errors or penalty notices. Consider creating a hotline or email address specifically for filing issues. Make sure all staff is trained on your firm's process to handle any issues they may encounter with clients.

Filing season is busy and can be a stressful time for firms – new and old, alike. But, having a plan in place will help ensure your practice is prepared for your first filing season.

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