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FIRM MANAGEMENT

How Does Your Firm Handle Inept Clients?

After working with clients for (mumble) decades, I still don't know how to resolve this. Unless you think your clients would be receptive to sitting through a course (live or webinar) on "How to be a Tax Client"?

Eva Rosenberg • Mar. 31, 2014

About this time of year, you are busy finalizing tax returns, and getting clients to sign things, upload things, or mail things in. That's the natural order of things.

Today's feature will not be providing you with any solutions. Why? Because, after working with clients for (mumble) decades, I still don't know how to resolve this. Unless you think your clients would be receptive to sitting through a course (live or webinar) on "How to be a Tax Client"?

Today's gripe. I'll bet this has happened to you, too.

Back in the days when we were advanced enough to use our own computers and in-house software to prepare tax returns, we still filed on paper. (Remember paper returns?) Some of us still prepare a few for clients who don't have computers or faxes or scanners and or Internet skills. We would print out all the relevant copies of the tax returns – IRS, state, client copy, our file copy. For the client, we would package things up nicely with:

- Each filing copy set all stapled together, with W-2s and 1099s with withholding attached at the right place.

- Pre-addressed envelopes (often with stamps) paper-clipped to the return that needs to be inserted into it.
- Signature lines that are highlighted in yellow, on pages marked with removable sticky tabs.
- Payment vouchers for IRS and state (if applicable) with envelopes for each voucher (often, with stamps) – with instructions on exactly what to write on the memo line of each check.
- Estimated tax vouchers for IRS and state (if applicable) with envelopes for each voucher (often, with stamps) – with instructions on exactly what to write on the memo line of each check.

Nothing could be simpler. Right? All they have to do is go right to the sticky tab and sign the returns. Slip the returns into the attached envelopes – and mail them. Write checks for the taxes and/or estimated payments, entering the relevant data on the memo line. Slip the checks into the attached envelopes – and mail them.

How many times have you had your clients take apart all the nice, neat sets you prepared for them? How many times have you had (usually the same few clients, year-after-year) call you and spend an hour or more with your staff (or you) being walked through how to put the whole thing back together again? Then, only to learn they put the state check in the IRS envelope – or vice-versa. Or they never mailed it in, after all. Or they didn't enter the tax year, form number and SSN on the memo line, so the IRS and/or state misapplied the payment and you had to track it down?

Thank goodness we are now filing electronically and rarely have to do that anymore. (And I have simply fired the clients who keep doing that because my blood pressure keeps rising when I hear Lulu having that conversation, yet again).

Instead, as this morning, we have a client who has uploaded signed docs to our www.securedrawer.com system. She has uploaded the state copy of the signed Form 8879-PE (partnership efilings) 3-5 times, without once managing to upload the IRS copy. After multiple exchanges of emails, Lulu finally called her and walked her through the process to locate (and sign) the correct form. Success!

Since this kind of thing has happened before with clients, Lulu had hoped to resolve the problem by upload each signature-required form separately and naming the files so they are easily located and identified: IRS efile form; State efile form; IRS payment voucher; state payment voucher...etc. Have you tried this?

You would think this would make it easy to avoid mistakes. You would be wrong.

Do YOU have a solution?

*Eva Rosenberg, EA is the publisher of [TaxMama.com](http://www.taxmama.com)®, where your tax questions are answered. Eva is the author of several [books and ebooks](#), including *Small Business Taxes Made Easy*. Eva teaches a tax pro course at [IRSExams.com](http://www.irsexams.com) and tax courses to help you deal with tax debt <http://www.cpelink.com/teamtaxmama> .*

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