

CPA Practice Advisor

OCTOBER 2020

VOLUME 30
NUMBER 9

Today's Technology for Tomorrow's Firm

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The Benefits of Windowed Working

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Set Yourself Some Deadlines

THERE ARE HISTORICAL references from the 19th century supporting an origin of the word, deadline, indicating a line or ditch created around the perimeter of a prison, over which if a prisoner crosses he (or she) will be shot dead. While such usage might seem outdated or even overly extreme, it stands to reason that the significance of the term could not be overlooked, lest one's life itself might be on the line, as it were. Today we think of deadlines as due dates, times after which a project or activity will no longer be accepted or allowed. Under normal circumstances, a phrase that probably will never be applied to anything that happened in 2020, April 15th represents a deadline for filing certain income tax returns; another deadline example that is also potentially being extended or modified this year might be the upcoming U.S. election, the votes for which might or might not be required to be made by November 3rd.

But 2020 aside, we in the accounting profession live in a world defined by deadlines. Not only are there various types of filing deadlines that occur every month, we constantly force deadlines on ourselves by scheduling audits, reviews, examinations, appointments, calls, meetings, and so on. Without deadlines, our work world might spiral into chaos.

And while 2020's pandemic has upstaged much of what we like to think of as normal work scheduling, it appears that deadlines are actually more important than ever. When your colleagues are working remotely, when children are schooling at home, when elderly family members need extra care, when businesses are closed and people

are taking gig assignments, when everything we once considered normal is in a state of upheaval, the one thing we can count on is the deadlines we set for ourselves.

Whether you enter your deadlines into your electronic calendar, jot them down on a pad of paper, write them on sticky notes placed on your mirror or refrigerator or computer screen, tie strings around your fingers, or use other creative methods for remembering, the deadline becomes the organizing tool in your life. It's the one thing we can count on to guide us to the next milepost.

I encourage employers, team leaders, parents, individuals to set hard deadlines for yourself and those who report to you. Adding

an item to your to-do list is a great way to keep track of the item, but without a fixed date and time for finishing the project, that project is likely to get pushed aside.

And while there is plenty of talk these days about how successful remote working is turning out to be, I think most can agree that it's easier to manage projects when people are present and accounted for during fixed times of the day. If your team (and that can be your work team or your personal/family team) is working a flex schedule and can't always be reached at what we once thought of as normal business hours, it's more of a challenge to finish tasks by particular dates. Set some deadlines. You might find they will help. And watch out for ditches.

Meanwhile, on an unrelated topic, I'd like to provide a hat tip to the AICPA and its technology arm, CPA.com. We've never experienced anything like this global pandemic, there's no pandemic rule book for the accounting profession and the clients it serves, and yet, somehow, the folks at AICPA/CPA.com have managed to provide extraordinary leadership and guidance in these uncharted waters. From bi-weekly town hall meetings, to legislative representation, to worksheets and FAQs and constantly revised resources and tools, I believe I'm speaking for the entire profession in saying we are uniformly grateful for your direction, assistance, support, long hours, weekends and nights, outreach, compassion, and responsiveness as we all make our way through COVID-19 and its many ramifications. Thank you. ■

— Gail Perry, Editor-in-Chief

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Is Remote Forever? *The Upcoming Remote vs. On-site Culture War*

ONCE UPON A time, working from home was a treat, a privilege for the chosen few. Since COVID-19, work-at-home instantly became the de facto way businesses stayed open for business.

With this new shift a new focus emerged on managing people on the team, but will this future last?

We are seeing around the country that accountants have begun heading back to their actual offices. As many shift back to the office, it begs the question, does being in the office still matter or are we heading back to the past? Is your boss again demanding face time and the old school belief, if you are not in your seat you are simply not working?

In the near future, we will see a test of two wills in the culture war of accounting: the remote model versus the face time system, which side will you land on?

THE END OF FACE TIME?

The old school mentality centers upon the office. You attend meetings and show that you have a presence. The more the boss can physically see you in and around the hallways, the more productive you are viewed as an employee.

Visibility equals output.

How many hours you bill will always matter, but in the face time system, sitting at a desk increases your intrinsic value. Billable hours hold more meaning when your physical presence can be seen by others. Your value isn't tied to the quality of your work, but your ability to sit in a desk.

One major flaw of the face time system is that it does not matter what you might be doing at your desk. Both your peers and the bosses are pleased to see you in your assigned seating. That is the longstanding tradition of your profession. What you are doing is

nice. Showing up and staying put is better.

Indeed, the face time system has led to a great many accountants becoming Zen masters at mine-sweeper and solitaire, as they rack up brownie points for being present and accounted for.

THE NEW MEASURE OF PRODUCTIVITY

The sudden shift into remote work demanded organizations adopt a rapid shift in how they operated overnight. Rather than mere presence in the office, organizations were forced into managing remote teams and people. Which begged the question, what does productivity mean when we cannot see you in a cubicle? How much more valuable is a person's digital responsiveness, compared to physical proximity outside an office door?

As managers experienced their people net of proximity and appearances, something radical happened. People were judged on responsiveness and the quality of those responses. If a manager can email, text or videoconference, get high-integrity answers and move onward and upward—that means everything. Certainly, it is more important than how they dress, a flashy smile or the convenient location of their chair down the hallway.

This is the new measure of productivity. In fact, depending upon your culture, it may mean something different for each employee depending upon their department and role.

The key is to work within your company in such a way that your productivity goals each and every week are made clear to your peers.

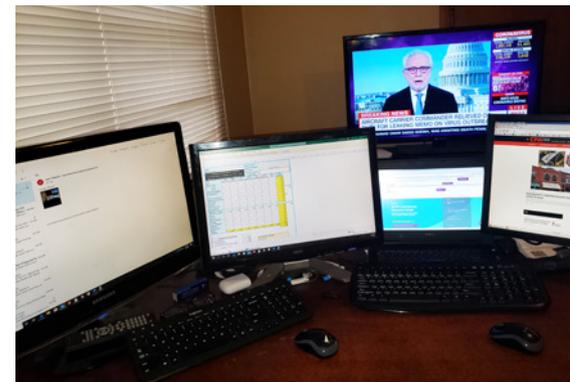
This idea of clarity between those around you will make the differences between working remote versus onsite wholly irrelevant. Candidly, isn't that where we are today? We stand at an inflection point in work cultures: management simply may never care where you sit, provided you are available and produce results.

So, do you need to complete certain audit sections or a certain number of tax returns? Do you need to follow up with five clients per day to ensure they are well-situated?

Your productivity goals are unique to you. Set up time with your boss. Brainstorm and align yourselves on some productivity goals, then write them down. There is no one better than you, right now, to design how your year-end review is going to read.

HOW TO OWN YOUR FUTURE

With clearly written goals, it falls on you to meet them. To succeed in the shift from the face time system, into lasting and successful work-at-home, taking full responsibility for your goals is a vital step. This means clear goals that you make transparent to your manager and those around you. That way, everyone knows you are



busy, why, and how well you are performing. Questions, anyone?

Then, if you are looking for brownie points, check in each Wednesday with your boss. Give your boss a progress report. If you needed to complete seven tax returns that week, and you completed five by midweek, let your boss know.

Yes, this may mean you may get more returns assigned to you. But it demonstrates that you are on top of things—you are the go-to person. On the flip side, if you only wrapped up two returns by Wednesday, give your boss a heads-up on reasons for pace of the work. Perhaps these returns were missing information, or the clients are particularly slow to respond. Maybe you and your boss agree to take on some different returns, move those forward, as the slow movers slip into the next week.

Whether projects pace ahead or fall behind, be the great communicator—the one who does not keep your manager awake at night. Own your work, own your goals, and you will own your future. ■



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Does Your Firm Have a Clear Communication Vision?

2020 HAS BEEN such an unusual year that I did not expect to have such a pleasant Labor Day weekend. After spending one-on-one time with my oldest daughter, we reaffirmed something that many of you may mistakenly take for granted. Social media posts, text messages, and email are not very good ways to communicate on a person-to-person basis. And the art of conversation seems to be getting compromised.

I am most concerned about how you communicate within your family, with your friends, and with your clients. While I do not consider it my role to tell you what to think, I do like to learn, assimilate the learning, and suggest outcomes based on that learning. Sometimes those outcomes can be supported with technology solutions. One technology that has changed most people it touches is the mobile phone. I have been particularly mindful of how smartphones have altered people's behavior.

Further, it seems like the isolation of the COVID-19 pandemic has aggravated communications that may have been compromised long before the onset of the isolation of stay-at-home orders. Now that people are circulating again, have you noted the difficulty in discerning people's moods or expressions behind their masks? Frankly, we have had to read behind many clients' masks for years.

SO, WHAT IS GOOD COMMUNICATION?

Here it is wise to turn to the experts and scientists for the best answers, but at the end of the day, your vision of good communication may be all that matters. Consider your own assimilation of communication skills from your earliest memories in your family to your interactions at school to your first job experiences to your own family today. What have you learned along the way?

It is hard to believe it has been almost 35 years since Robert Fulghum wrote and published *All I Really Need to Know I Learned in Kindergarten*. Some reminders of the simple ideas for you to consider include:

- Share everything.
- Play fair.
- Don't hit people.
- Put things back where you found them.
- CLEAN UP YOUR OWN MESS.
- Don't take things that aren't yours.



- Say you're SORRY when you HURT somebody.
- Wash your hands before you eat.
- Flush.
- Warm cookies and cold milk are good for you.
- Live a balanced life - learn some and drink some and draw some and paint some and sing and dance and play and work some every day.
- Take a nap every afternoon.
- When you go out into the world, watch out for traffic, hold hands, and stick together.
- Be aware of wonder. Remember the little seed in

the Styrofoam cup: The roots go down and the plant goes up and nobody really knows how or why, but we are all like that.

- Goldfish and hamsters and white mice and even the little seed in the Styrofoam cup - they all die. So do we.
- And then remember the Dick-and-Jane books and the first word you learned - the biggest word of all - LOOK."

But a much older piece of literature seems to have been forgotten by many:

Aleph	First Commandment	I am the Lord your G-d who has taken you out of the land of Egypt.
Bet	Second Commandment	You shall have no other gods but me.
Gimmel	Third Commandment	You shall not take the name of the Lord your G-d in vain.
Dalet	Fourth Commandment	You shall remember the Sabbath and keep it Holy.
Hey	Fifth Commandment	Honor your mother and father.
Vav	Sixth Commandment	You shall not murder.
Zayin	Seventh Commandment	You shall not commit adultery.
Chet	Eighth Commandment	You shall not steal.
Tet	Ninth Commandment	You shall not bear false witness.
Yod	Tenth Commandment	You shall not covet anything that belongs to your neighbor.



But what does it take for good communication to take place? Alessandra Martelli suggests and explains this list:

- Completeness
- Conciseness
- Consideration
- Concreteness
- Courtesy
- Clearness
- Correctness

Terry Corbell suggests 10 Management Attributes for Effective Communication:

1. Listening
2. Awareness of others
3. Empathy
4. Inspiration with encouragement
5. Humor
6. Fairness
7. Avoidance of unnecessary conflict
8. Positive attitudes
9. Minimal stress
10. Courage

While I could continue to cite lists and summaries of communications, two final lists from Jane Taylor are published on *Habits for Wellbeing*. Some reminders of the simple ideas for you to consider include:

FIVE BARRIERS TO EFFECTIVE COMMUNICATION

1. Judging the other person
2. Not paying attention to the person you are talking to
3. Using technical language
4. Giving solutions or unwanted advice
5. Avoiding the concerns of others

NINE EFFECTIVE COMMUNICATION SKILLS

1. Active listening
2. Non-verbal communication
3. Asking questions
4. Being clear and succinct
5. Clarifying and summarizing
6. Being empathetic
7. Providing feedback
8. Developing trust and rapport
9. Being present

AND HOW CAN I APPLY THIS?

What I was hoping to do throughout this year of “vision” articles was to provide insight into various topics monthly. Perhaps you have observed this year that many are having issues communicating clearly. It has become more difficult, with less face-to-face encounters. I have been appalled by statements made in email, on the phone, in video calls and on social media by CPA professionals. I’m sure others have been equally offended by my own faux pas in this time of stress and political incorrectness. Consider the following situations that illustrate poor communication:

- Using smartphones, often for social media or email, while in another conversation.
- Continuing a text conversation that could have been handled much quicker another way.
- Using email when a phone call would have been faster.
- Being confused about the best way to reach someone. Email? Text? Social media? Call?

At a professional level, we have maintained client communication preferences for some time including opt-in or opt-out, sometimes enforced by laws such as the CAN-SPAM Act. Mail vs. email vs. phone vs. text has been augmented by WhatsApp, LinkedIn, Facebook, and other social media. But is an omnichannel approach to communication best? Shouldn't you know your clients' (and family members') preferred way to communicate and use that approach? What is best for you is not necessarily best for them. And communication in bulk or being distracted while trying to communicate may be like no communications at all.

Further, it became apparent during the COVID-19 pandemic that people needed interaction and wanted to speak more, even though their work burdens had increased.

Countless articles have been written about the stress and impact of video calling during this period. The increased use of cameras and the acceptance of home settings, and less than professional backgrounds, have become a new normal. Still, only time will tell if that becomes a permanent, acceptable normal. Discern if your family members or clients need more time for a conversation now and spend that time at the beginning or at the end of any interaction that you have with them.

You are likely to get the best results in business and life if you can communicate effectively. For me, it matters most that I communicate effectively among my family. Sometimes I fall down, but I always try to focus on any family member that makes a request. Sure, I am busy, and it takes discipline to stop, listen, and respond thoughtfully.

In business, occasionally I use

the wrong words, am not thoughtful enough, or must communicate unpopular or bad news. I am sure you do, too. What is the best way to have positive or difficult communication with your clients? Lynn Kirkham suggests these ways to THINK (True, Helpful, Inspiring, Necessary, or Kind) before you speak.

- Determine if what you want to say is true
- Say something if it is helpful, or stay silent if it is not
- Identify whether your comment might be inspiring to other people
- Speak if your comment is necessary
- Stop yourself from speaking if what you want to say is not kind

If you can have just one better communication because you spent the time to read this column, I would be pleased. It would be even better if you can make better communication a habit. Good communication habits would be best for us all. ■



The Importance of Payroll Cannot Be Overstated

PROCESSING PAYROLL IS not for the faint of heart. Missed hours, irate employees, incorrect vacation time, if you process payroll, you've likely heard it all. However, the importance of payroll cannot be overstated. Your employees are willing to overlook a lot of things, but not getting paid on time is not one of them, and as important as it is to pay your employees on time, it's just as important to pay them correctly. And payroll managers, tasked with getting all the necessary payroll details entered correctly have no time to answer questions or correct errors. That's why it's so important to get payroll right the first time.

Like everything else, payroll processing has changed. Years ago, payroll services were mainly used by larger companies, and affordable options were not readily available for smaller businesses. But the products on the market today are suitable for businesses of all sizes, with many designed specifically for smaller businesses.

Today, payroll departments are responsible for paying employees and contractors, managing state and federal deductions, managing payroll taxes, and processing other deductions such as health and life insurance, retirement plan and company matching contributions, HSA deductions, and even payroll garnishments, when they're necessary. Payroll departments also need to track employee sick and vacation time, and if there's anything that employees pay attention to, it's

their sick and vacation time. Payroll personnel are also tasked with ensuring the labor laws are being abided by and that employees are being paid according to state and federal labor statutes.

Luckily, there are payroll service providers available that have made it easier than ever for businesses of any size to process payroll. In this issue, we've looked at 13 of them. These 13 payroll applications vary in capability, with some designed solely for smaller businesses, while others are a good fit for accounting firms processing payroll for their clients.

The products included in this review are:

- AccountantsWorld - Payroll Relief
- ADP - Run, Powered by ADP for Accountants
- AMS Software - 1099-Etc
- CheckMark Software
- Gusto
- Intuit - Intuit Online Payroll for Accountants
- Justworks Payroll
- OnPay
- Paychex - Paychex Flex
- Payroll Logix - Crest Payroll
- Rippling Payroll
- SurePayroll

There's also a handy chart that provides a quick list of features and functions found in each of the reviewed applications, with the chart serving as a handy guide to locating the product or products that include the features that you're looking for.

While some of these payroll applications offer a demo, it's not really possible to try out a payroll application without doing a lot of upfront work in the process. And even if a demo is available, you'll still need to obtain information such as payroll funding dates and tax remittance

dates directly with the vendor, as these can vary tremendously between payroll software and service providers.

Whether you're looking for a payroll service provider for your client to use, or looking to use one yourself in order to offer payroll services to your clients, the payroll reviews in this issue provide you with all of the details you need to make an informed decision that suits your needs.

In addition to the 12 payroll applications reviewed in this issue of CPA Practice Advisor, there are five additional applications we'd like to mention.

These five programs offer a robust payroll module within their core application and are a perfect fit if you're already using the application in your business or your practice. If you use one of these applications and are in the market for payroll software, it makes sense to start with the product you're already using.

- CenterPoint Accounting - Payroll
- CYMA - Payroll
- Cougar Mountain Denali - Payroll
- Thomson Accounting CS - Payroll
- Wolters Kluwer Tax & Accounting - Payroll

	Cloud Version Available	Mobile Access	Dashboard Data Entry	After-The-Fact Payroll	Tax Tables for all 50 States	Custom Reporting	Report Export	Payroll Liability Reporting	Integration with Time-keeping Software	Integration with Vendor Modules	Integration with Third-Party Applications	Client/Employee Portal	Client Access to Paystubs & W-2's	HR Tools	Robust Online Help System	2020 OVERALL RATING
1099 FORMS FILER/AMS PAYROLL			X	X	X		X		X	X				X		★ 4.25
CHECKMARK				X	X	X	X	X	X	X		X	X	X		★ 4.5
CREST PAYROLL			X	X	X	X	X	X	X	X	X	X	X	X		★ 4.75
GUSTO	X		X	X	X	X	X	X	X	X	X	X	X	X		★ 4.75
INTUIT ONLINE PAYROLL	X	X	X		X	X	X	X		X	X	X		X		★ 4.75
JUSTWORKS	X	X	X	X	X	X	X	X	X	X	X	X	X	X		★ 4.5
ONPAY	X	X	X		X	X	X	X	X	X	X	X	X	X		★ 5
PAYCHEX FLEX	X	X	X		X	X	X	X	X	X	X	X	X	X		★ 5
PAYROLL RELIEF	X	X	X	X*	X	X	X	X	X	X	X	X		X		★ 5
RIPPLING PAYROLL	X	X	X		X	X	X	X	X	X	X	X	X*			★ 4.75
RUN POWERED BY ADP	X	X	X		X	X	X	X	X	X	X	X		X		★ 4.75
SURE PAYROLL	X	X	X		X*	X	X	X	X*	X*				X	X	★ 4.5

* SEPARATE MODULE MUST BE PURCHASED

AccountantsWorld Payroll Relief

Payroll Relief, from AccountantsWorld is designed for accounting firms that wish to offer payroll services to

STRENGTHS:

- Unlimited client portals available
- Friendly user interface
- Strong automation

POTENTIAL LIMITATIONS:

- Is only available to accounting firms (may or may not be a weakness)
- No HR tools

their clients. Though the application offers complete integration with other AccountantsWorld programs, it can also be used as a stand-alone payroll application if desired.

Best suited for small to mid-sized accounting firms, Payroll

Relief is an online application that can be used with any device including desktop and workstation computers, as well as tablets and mobile devices, with the

www.accountantsworld.com

same features found regardless of the device used.

Designed for streamlined payroll processing, Payroll Relief uses an exception-based process to for entering payroll, which means only changes to the regular payroll such as the addition of vacation or sick hours will need to be added prior to each pay run, eliminating the need to enter hours for each employee. Users can also provide their clients with a link to an electronic timesheet, where they can enter their own payroll information, reducing data entry time even more. When the spreadsheet is completed, firms can simply import the form directly into Payroll Relief. For select clients, users can provide direct access to the



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payroll data entry screen in order to enter all payroll information.

Payroll Relief from AccountantsWorld is well suited for small to mid-sized accounting firms that offer or wish to offer payroll services to clients. Those interested in Payroll Relief should contact AccountantsWorld directly for additional information as well as a custom quote.

RUN Powered by ADP Payroll

RUN Powered by ADP is designed for businesses with 1-49 employees. For accounting firms that are

STRENGTHS:

- Offers four different plan
- Offers a plan specifically for accountants

POTENTIAL LIMITATIONS:

- Pricing can run high

interested in using ADP products to offer payroll services to clients, they can partner with ADP through Accountant Connect, which provides payroll and HR resources that firms can offer

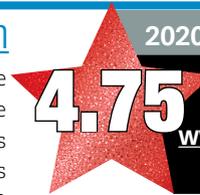
their clients, with an Accountant Portal available for connecting firms to their clients.

RUN is completely cloud-based, offering users anytime access from a variety of devices including workstations, desktop and laptop computers, as well as smart phones and tablets. RUN is also scalable, with

www.adp.com

four plans available, ranging from the two-employee Core Payroll to Pro Payroll & HR which offers complete payroll and HR tools for businesses. All RUN plans offer full-service payroll processing which includes direct deposit, new hire reporting, W-2 and 1099 processing, and complete tax filing. All plans except the Core plan also include payroll delivery and state unemployment insurance management.

RUN by ADP includes an easily navigated user dashboard that provides access to the Run Payroll feature as well as all other payroll related options. If subscribed to the optional HR features, they can also be accessed directly from the dashboard. In addition, users can check upcoming payroll dates, enter



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manual checks and view any messages directly from the dashboard.

RUN Powered by ADP is designed for small businesses with up to 49 employees. There are four plans to choose from: Core Payroll, which is designed for 1-2 employees, Enhanced Payroll, Complete Payroll & HR, and Pro Payroll & HR. Those interested in RUN can contact ADP directly for a custom quote for their business or their firm.

AMS 1099 Forms Filer/Payroll

STRENGTHS:

- Affordably priced
- Integrates with QuickBooks, Sage 50cloud, Excel
- Specific versions available for Restaurant, Farm, Nanny, Caregiver, Household Employee, Construction, and Church and Nonprofit

POTENTIAL LIMITATIONS:

- Only available as an on-premise application
- Users need to purchase multiple AMS applications for complete functionality
- No mobile application
- No portal
- No custom reporting
- No access to paystubs or W-2 forms
- No HR tools

AMS Payroll/1099 Forms Filer/Payroll (AMS Payroll) from Advanced Micro Solutions is an add-on module that is designed to work with W-2/1099 Forms Filer. Though AMS Payroll also works with other AMS applications, it cannot be used as a stand-alone payroll application.

All AMS applications are best suited for small to mid-sized businesses, with

www.1099-etc.com

AMS Payroll supporting up to 1,999 payers and up to 9,999 employees per payer, making it a good option for firms processing payroll for multiple clients, although its on-premise only structure may not be suitable for some firms.

AMS Payroll can be purchased directly from the AMS website, with users able to download the application immediately. There is not a cloud version of the application available, nor is there a mobile app that can be used with the application.

AMS Payroll offers both live and after-the-fact payroll processing, with payroll available in all 50 states, the District of Columbia, and Puerto Rico.

The current price for AMS Payroll is \$129 per year,



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www.CPAPracticeAdvisor.com/21156402

with the required W-2/Forms Filer module running \$129 as well. That flat fee, and annual updates, can be used to manage payrolls for any number of businesses. All software can be immediately downloaded once purchased, with a free demo available for those that wish to try out the application prior to purchasing.

REVIEW: PAYROLL SYSTEMS

CheckMark Payroll

CheckMark Payroll is part of CheckMark's suite of accounting and payroll applications currently available to U.S. and Canadian companies.

STRENGTHS:

- Supports unlimited companies and employees
- Includes after-the-fact payroll capability
- Supports unlimited pay runs

POTENTIAL LIMITATIONS:

- Does not offer a cloud-based application
- Does not offer an employee portal
- No mobile app

CheckMark applications work on both Windows and Mac operating systems and is designed to be deployed on-premise. Though CheckMark Payroll integrates with other CheckMark applications, it is designed to be used as a stand-alone payroll solution.

CheckMark payroll supports an unlimited number of employees and companies at no additional cost, with after-the-fact payroll capability included in the application. The main navigation screen is divided into three sections; Setup, Payroll,

www.checkmark.com

and Reports, with a variety of options available for each area. Users can also access system features from the drop-down menu at the top of the screen.

CheckMark Payroll supports up to 12 different hour categories that can be used for employees that are paid hourly, with pre-defined categories included in the application. In addition, users can track both sick and vacation hours for all employees. The application supports both regular paychecks as well as direct deposits, and users have the option to import hours from timekeeping applications or enter hours manually or by using a grid-style spreadsheet which speeds up the entry process for those entering payroll data for a large number of employees. There is also an additional income option available for companies that pay employees outside of their regular pay such

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as commissions or tips. In addition, users can track any additional information using one of the several user-defined fields included in the application.

Currently CheckMark Payroll is available in two editions: CheckMark Payroll Pro, which runs \$429 per year, while CheckMark Payroll+ is \$499 and offers more comprehensive support options. Both plans offer access to all program fixes and updates, including updated tax tables. Those interested in CheckMark Payroll can try the system out for up to 60 days at no cost.

Gusto Payroll

Gusto is a cloud-based payroll application designed for small businesses, though the application is also suitable for accounting firms offering payroll services to clients. Gusto can be accessed from all devices including desktop and workstation computers, laptops, smart phones, and tablets.

STRENGTHS:

- Multiple plans available
- Good integration with third-party applications
- Includes employee self-service

POTENTIAL LIMITATIONS:

- Add-on modules raise monthly cost
- Top plan pricing may be too expensive for some small businesses

Along with full payroll services, Gusto also includes a number of add-on options such as hiring and onboarding, benefits,

time tracking tools, and HR resources including guides, law alerts, and access to HR professionals.

www.Gusto.com

Their latest addition, Gusto Cashout, is designed to provide employees with access to funds between pay periods, with the advance automatically repaid from their next check with no fees or interest.

Gusto supports an unlimited number of payrolls, and easily handles flexible payment schedules as well as multiple pay schedules and multiple pay rates for each employee. Gusto also supports employee reimbursements, garnishments, and unlimited extra and off-cycle payroll runs.

Gusto is designed for small businesses and offers a flexible pricing structure, with four plans available: the Basic Plan, which is a beta program that is recommended for 1-2 employees; the Core Plan, which is \$39

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per month, with a \$6 per person fee; the Complete Plan, which includes next-day direct deposit and an employee directory, which is \$39 per month, with a \$12 per person fee; and the Concierge plan, which offers access to HR professionals and the HR resource center, and runs \$149 per month, with a \$12 per person fee. Gusto also offers a contractor option for businesses that only pay contractors. Those interested in Gusto can access an online interactive demo to try out prior to subscribing.

Intuit Online Payroll for Accountants

Intuit Online Payroll for Accounting Professionals is designed specifically for accounting firms that are interested in offering payroll and related services to clients

STRENGTHS:

- Designed for accounting firms
- Pricing levels drop as number of clients increase
- Excellent integration with QuickBooks applications

POTENTIAL LIMITATIONS:

- No integration with third party applications
- No HR capability is included in the application
- No report export availability
- No after-the-fact payroll availability

not currently using QuickBooks applications. For QuickBooks clients, firms can choose to use QuickBooks Online Payroll.

Intuit Online Payroll for Accounting Professionals can be used as a stand-alone payroll application, but will offer accounting firms greater

functionality if used with other Intuit or QuickBooks applications.

Accountants.intuit.com

Intuit Online Payroll is completely cloud-based, with users able to access the application from any type of device, including desktop computers, workstations, laptops, tablets, and smart phones, with a mobile app available for iOS and Android devices.

One of the application's best features is the ability to customize client access for each individual client, allowing some clients complete access to the entire payroll application, including entering payroll information and running payroll, to handling all payroll processing at the firm, with clients only able to access payroll registers and paystubs. Each client set up in Intuit Online Payroll has access to the client portal, which can be custom branded with the firm's logo and other marketing details.

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Intuit Online Payroll for Accounting Professionals can be used as a stand-alone application, but is better suited to firms already using other Intuit/QuickBooks applications. Pricing for Intuit Online Payroll for Accounting Professionals starts at \$45 for a single client per month, with a per employee charge of \$4 per month assessed, with the price dropping to \$22.50 per client for 2-5 clients, with the per employee charge dropping to \$1.50. The price drops for additional employees.

Justworks Payroll

Justworks is a PEO (Professional Employer Organization) that has bundled payroll, compliance, HR, and

benefits administration under a single umbrella. Designed for smaller businesses that need access to affordably priced benefits and automated payroll and HR services, Justworks is cloud-accessible, with two plans available.

Both the Basic and the Plus plans in Justworks offer payroll,

compliance reporting, and resources, with options for a variety of insurance options including medical and

dental insurance options, as well as retirement plans.

Justworks supports both hourly and salaried employees. They can be paid on weekly, biweekly or semi-monthly pay frequencies - note, however, that non-exempt employees can only be paid on a bi-weekly or weekly pay frequency. Non-exempt salaried employees and hourly employees can record their hours worked in Justworks using Justworks' Timecards feature. The dashboard in Justworks provides access to all system functions such as payroll, HR, and benefit management, depending on the version subscribed to.

For employers with 25-99 employees, Basic is \$44 per employee per month; the Plus plan is \$89 per employee, per month. Discounts are available for

www.justworks.com

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Read the full review for this product online at:

www.CPAPracticeAdvisor.com/21156395

larger employers. More details at <https://justworks.com/pricing>. Both Basic and Plus editions include complete payroll processing, online employee onboarding, and access to HR consulting, with options for benefit management including health insurance, a 401(k) plan, and other benefits such as dental and vision insurance along with health and wellness perks.

STRENGTHS:

- Offers all-in-one solution with payroll, HR and compliance included
- Pricing down from last year
- Complete tax filing and payroll compliance
- Strong benefits options

POTENTIAL LIMITATIONS:

- Better suited to businesses with 100 or fewer hourly and salaried employees

OnPay Payroll

OnPay is a cloud-based payroll system for small businesses up to 500 employees. OnPay also offers partner

pricing for accountants, with free payroll available for the firm, and discounts increasing as additional clients are added. In addition, any firm currently using QuickBooks or Xero will receive expert help with the setup and integration process.

OnPay Payroll offers full-service payroll, which is easily

accessible from any computer. The application also includes a mobile app for both iOS and Android devices, with all payroll features available on the mobile app.

OnPay offers a variety of features including unlimited pay runs, and offers users the choice to pay employees via a check, debit card, or direct deposit. OnPay includes payroll for all 50 states and handles all tax filings and payments. Multi-state payroll is supported in the application as are both multiple pay rates and schedules. OnPay also pays contract employees, can handle garnishments, and includes a complete

employee self-service option that allows employees to handle their own onboarding, access both current and historic paystubs, and manage all of their payroll related forms including W-4s as well as any voluntary payroll deductions for benefits offered. OnPay also includes complete PTO management, with users able to create custom PTO policies, with the application automatically tracking PTO totals. In addition, OnPay

www.onpay.com

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offers payroll options for niche industries such as restaurants, nonprofits, and agricultural workers. The product also processes year-end W-2s and 1099s.

Currently, OnPay's base fee is \$36 per month, with a \$4 per person/per month fee assessed. Accounting firms partnering with OnPay will receive a 10% discount for more than two clients, with the firm's payroll provided at no cost. A free-30-day trial is also available to those who wish to try out OnPay prior to purchasing.

STRENGTHS:

- Includes payroll and HR at one inclusive price
- Offers one plan at one price
- Suitable for up to 500 employees

POTENTIAL LIMITATIONS:

- Does not offer an auto-pay option
- No after-the-fact payroll available

Paychex Flex

Paychex Flex is an online payroll service application from Paychex. Designed for small businesses with

up to 50 employees, Paychex Flex offers three plans: Paychex Go, Paychex Flex Select, and Paychex Flex Enterprise. All three plans offer full-service payroll, including processing and remitting of all required tax forms and payments. Along with complete payroll services, Paychex Flex also includes

HR resources designed for small businesses.

Paychex Flex (Select and Enterprise plans) also includes a free mobile app for both iOS and Android devices, with payroll able to be processed from any device. For accounting professionals interested in

using Paychex Flex, the application also includes AccountantHQ, a centralized dashboard that lets accounting professionals access all of their clients from a single platform.

All three versions of the Paychex Flex include complete online payroll processing along with time tracking and attendance, complete tax administration, and new hire reporting. The Select and Enterprise plans also include HR resources, a general report, state unemployment insurance services, and accounting software integration.

Paychex Flex offers direct deposit capability, along with benefit management and multi-state payroll capability, with users able to process payroll from the main dashboard in the application.

Paychex Flex also offers an option for accounting

www.paychex.com

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professionals that are interested in offering payroll services to clients. Paychex Flex offers three plans, with additional payroll options available for larger businesses as well. Pricing varies, depending on the plan subscription as well as any add-on options, with pricing information available directly from the vendor.

STRENGTHS:

- Three plans available that are suitable for up to 50 employees
- Excellent integration options
- Good selection of add-on modules

POTENTIAL LIMITATIONS:

- Add-on modules can increase pricing significantly

REVIEW: PAYROLL SYSTEMS

Crest Payroll from Payroll Logix, Inc.

www.crestpayroll.com

Acquired by Payroll Logix Inc. in 2018, Crest Payroll is designed for accounting professionals

that currently or plan to offer payroll services to their clients. Crest Payroll is cloud-based and can be used on a variety of common web browsers which include Internet Explorer, Mozilla Firefox, Opera, Safari, and Google Chrome. There is

in the future.

Crest Payroll supports unlimited users and unlimited clients, and includes role-based access for accounting firm employees, clients, and client employees, with clients logging into the payroll portal directly from their website. The payroll dashboard provides a quick look at the total number of clients, total number of employees, total payrolls processed, and total number of states. Users can also access all payroll functions directly from the dashboard, including setup, payroll, compliance, eServices, reports, and add-ons.

STRENGTHS:

- Designed for accounting firms
- Includes a customer portal/employee self-serve feature
- Handles unlimited companies and employees

POTENTIAL LIMITATIONS:

- No mobile app

currently not a mobile app available in Crest Payroll, although one is expected to be released



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Crest Payroll can be completely customized to reflect firm branding. Those interested in Crest Payroll can request a price quote directly from the vendor. There are no per-employee fees or other additional charges assessed, with users billed a flat rate each month.

Rippling Payroll

<https://Rippling.com>

Rippling Payroll is part of Rippling's all-in-one platform that combines payroll with complete HR and benefits management. Completely online,

Rippling is suitable for businesses with 2-500 employees. Rippling Payroll can also partner with accountants who wish to provide payroll services to the clients, with free payroll included for the firm.

Tracking, App Management, and Device Management. All modules can be purchased separately, so you only pay for what you need.

Rippling Payroll supports payroll for all 50 states, as well as international payroll, and new hire filing as well. The application includes an unlimited number of pay runs as well as complete tax filing and remittance for federal, state, and local taxes and also manages completed I-9 documents, as well as year-end forms such as W-2s and 1099s. Users can pay employees using a standard check, with direct deposit supported in the application as well, and the employee self-service portal allows new employees to enter their personal data directly into Rippling Payroll. Employees can also use the portal to access paystubs and add, edit, or delete tax, benefit, or other

Those interested in Rippling Payroll will have to also purchase the Employee Platform Management plan. The management plan

is also required in order to use any of the other modules offered which include Full-Service Payroll, Benefits Administration, ACA & Cobra, HR Help Desk, Applicant

STRENGTHS:

- Includes a complete employee platform
- The application is scalable supporting between 2-500 employees
- Offers excellent integration options
- Supports international payroll

POTENTIAL LIMITATIONS:

- Can be expensive for small employers
- Support is available by live chat and email, not by phone



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www.CPAPracticeAdvisor.com/21156386

personal information. Rippling Payroll also supports wage garnishments, and tracks PTO, with user-defined fields available for tracking additional information.

Rippling Payroll is a scalable employee management platform well suited for businesses with 2-500 employees. The base price for Rippling Payroll is \$35 per month, with a \$8-\$10 per employee charge for the employee management platform and an \$8-\$10 per employee charge for the payroll module. Various add-on options such as the HR Help Desk and App Management modules are also available at an additional cost.

SurePayroll

www.surepayroll.com

SurePayroll from Paychex is designed for small businesses with fewer than 100 employees. SurePayroll

offers two plan options: Self-Service for those who wish to manage all payroll in-house, and full-service, which includes complete payroll processing and tax filing. SurePayroll also offers a reseller program for accountants that wish to offer payroll processing services to their clients.

processing, including calculation, filing, and tax remittance. SurePayroll pricing includes an unlimited number of pay runs, direct deposit capability, and offers two-day payroll processing. In addition, employees will have access to online paystubs, and payroll can be automated to reduce the amount of data entry needed.

SurePayroll offers an intuitive user interface with little data entry required to process payroll. The Auto Payroll option sends users a reminder prior to the payroll processing date, prompting users to make any changes prior needed. Using Auto Payroll, users can simply enter the default hours for each employee and Auto Payroll handles the rest.

SurePayroll offers a reseller's program for accountants

STRENGTHS:

- Includes an Auto Payroll option for streamlined payroll processing
- Offers a self-service and a full-service plan
- Intuitive system navigation

POTENTIAL LIMITATIONS:

- Integration with accounting applications an extra charge
- Integration with time-keeping application an extra charge
- Multi-state tax filing an extra charge

app for both iOS and Android smart phones and tablets. The full-service plan offers complete payroll



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tants who wish to offer payroll services to clients, with special pricing available to accounting firms that enroll in the resellers program. The Self-Service plan currently runs \$19.99 a month, plus a \$4 per employee charge, while the Full-Service plan is \$29.99 per month, with a \$5 per employee charge. Various add-on options such as accounting software integration, time clock integration, and tax filing in multiple states are also available at an additional charge per month. There is also a free trial available for those interested in trying out the application.



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How to Help Your Clients Embrace the Virtual

FOR A PROFESSION that is literally centuries old, accounting tends to be full of early adopters. Because a fundamental aspect of our job is computational, it makes sense that we're some of the first to reach for new and powerful tools that allow us to better serve our clients. You were good at Excel before most of your friends, you knew what the cloud was before them, and you were more equipped to handle the transition to a work-from-home reality. Unless you happen to only serve technology companies, the same likely can't be said for your clients. If you're struggling to serve clients who aren't as adept at technology, it's up to you to help them embrace the virtual.

Now, I'm not advocating that you go out and hold classes on how to use Zoom or get more from email, though you should look up those tips for yourself. Instead, what you can do is to make your clients feel as comfortable as possible with a virtual experience. To facilitate this comfort, you can create a cohesive internal policy that allows for flexibility in how you engage and communicate with clients. Making them feel secure and well served, whether while using Zoom or Slack or your online signature portal, is as much about what you do as the tech itself.

The first step to developing a strategy is understanding that every client is different. If you try to adopt a unilateral one-size-fits-all

approach, you and your clients are both going to end up frustrated. If somebody would rather talk on the phone than meet over Zoom, that's fine. You may have tech-savvy clients who want to leverage advanced features such as Zoom annotations or Google Sheets revisions. That's great for them, but it doesn't have to be the standard you hold all clients to.

It's best to introduce new tech tools and functionalities to clients gradually. If you're meeting with a client who's never used screen

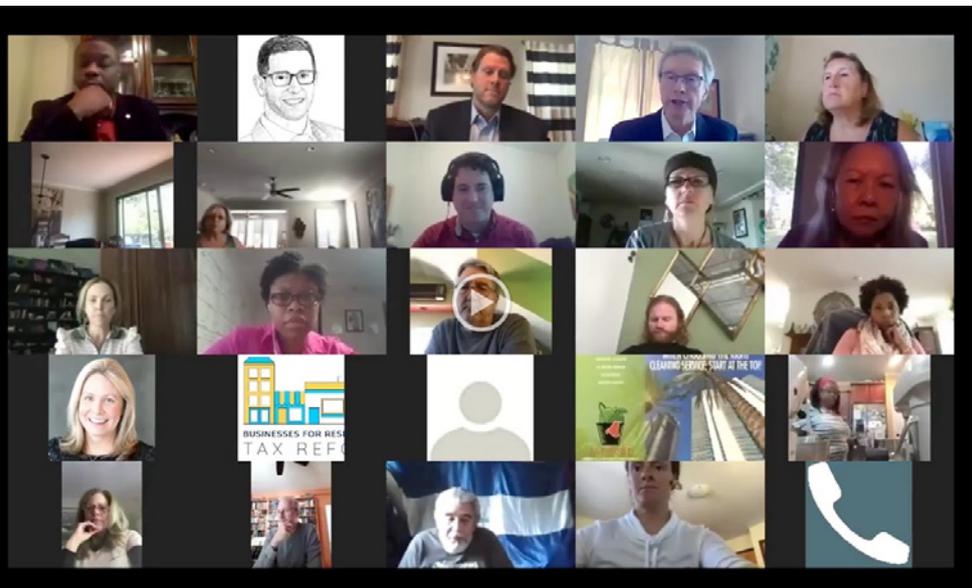
share, for example, don't start by asking them to share their screen. Let people get used to the basic operations of every platform before building on it. Letting clients get comfortable walking before they begin to run, so to speak, will create a much smoother experience overall. The client won't get overwhelmed by a new technology, and you won't find yourself having to explain too much too soon.

When the opportunity presents itself, introduce new features in a way that makes your client realize the potential of the platform. We've all become so accustomed to tech that we can forget that, at its very base level, this stuff is cool. Maybe you decide to show up to a meeting with your clients' office as your Zoom background. If it makes them smile, they're going to be immediately more comfortable talking to you over video. It may seem like a small detail, but it can make a world of difference. The same

goes for the body language you use during meetings. Make sure that you are as welcoming and affable as possible. If it looks like you're dreading a videoconference, how do you think your client is going to feel?

It's also great to give people options with regard to how they reach you. When it comes to secure operations like signatures, you are limited in your options, but that's not true of casual conversation. In our personal lives, we all know people who love group texts as well as people who abhor them. Our professional lives are no different. Find the channels that resonate best with each client and stick to them. A good rule of thumb is to have one text channel and one oral channel in addition to email and written communication. That may be text and Zoom for one client and Slack and phone calls for another. The better you tailor the method to the message for each client, the better your communication will be.

Getting clients on-board with virtual is all about creating an experience that makes them feel cared for. If you can do that, the barriers of space and screen will disappear in no time. ■





BUILDING CONNECTIONS IN A VIRTUAL WORLD

By Jim Boomer, CPA.CITP

IN THE PAST six months, several organizations in the accounting profession have postponed or canceled their conferences in response to the COVID-19 pandemic, while others have taken their events virtual. In many ways, moving an event to a virtual environment is a good thing. CPAs can save on the cost of a plane ticket and hotel room while still learning about the latest trends in the profession, connecting with others and receiving CPE.

But as anyone who's attended an event in person knows, the greatest value often comes not from the keynotes and breakout sessions – as informative and inspiring as they may be – but from random interactions with peers and solution providers. Online meetings simply lack many of the benefits of an in-person conference: conversations over dinner or drinks and the fresh perspectives that come from leaving one's own home or office.

At Boomer Consulting, Inc., we're anxious to be able to get back to meeting with friends and colleagues in person. But we also realize that the trend to move more meetings online is likely to continue even after the pandemic fades. For that reason, we all need to get comfortable building connections in a virtual world.

TREAT VIRTUAL CONFERENCES LIKE LIVE EVENTS

When you attend a conference, you likely clear the decks as much as possible before you leave and add an auto-responder to your email, so people know you'll be out of pocket for a few days. Do the same for virtual events.

Although you may be sitting at the same desk or in the same home office that you work in every day, don't treat virtual conferences like just another workday. Don't schedule calls or work on other projects. If you're not in a session, talk to a vendor or meet up with someone you haven't connected with yet. This will help you immerse yourself in the event, and you'll get more out of it in the end.

GO WITH THE FLOW

Don't expect every online conference to run perfectly, especially since the conversion to online was unexpected, and many organizers had only a few months to identify a platform and recreate an experience.

There will be some technical glitches, awkward moments, and less-than-optimal internet connections along the way. Presenters might not be as enthusiastic and engaging when speaking to a monitor as they are on stage. A sense of humor, empathy and acknowledgment that this is a weird time will go a long way.

EMBRACE INNOVATION

Whether you're planning, speaking at, or attending an online event, try to think outside of the box. Nobody wants to sit through an eight hour day of dull webinars and PowerPoint presentations.

That's why, when we decided to take our Boomer Technology Circles Summit virtual this year, we wanted it to be more than a Zoom call. After evaluating several differ-



ent platforms, we chose to hold the Summit on VirBELA, an immersive, virtual event environment that promotes interaction and collaboration among participants. Our members and sponsors could engage in small group or one-on-one conversations and even have a dance party during the Summit. It took a little time to get comfortable with the technology and loosen up, but everyone seemed to enjoy creating their avatars and navigating the virtual conference center.

Don't be afraid to try something new. Great things happen when you get outside of your comfort zone.

STAY INTERACTIVE

Virtual conferences might lack the intimacy of a physical gathering, but it's still possible to connect with your peers.

If you feel a little unsure of interacting in a virtual world, try outlining a few goals for the event. That can be as simple as deciding:

- How many new people you want to meet during the event
- How many existing contacts you want to reconnect with
- How many exhibitors you want to talk to in the expo hall
- Which speakers you want to follow up with after their session
- Which questions you want to ask of your peer group

By setting a few success metrics, you can check in with yourself during the event to make sure you are on the right track – and make adjustments if you aren't.

Many event organizers are also adding contests and games to their events. For the BTC Summit, attendees visited sponsor booths

to complete a MadLib, which then entered them into a drawing for \$10,000. It was a fun way to break the ice while encouraging members to stay engaged.

With our profession facing challenges now and in the near future, community is more important than ever. We all need to lean on our peers, learn from each other's experience, and find out what works and what doesn't in the "new normal."

Whether you meet with peers in person or virtually, you need to give in order to get. The more you share, the more value you get back. So make a commitment to engage and build connections in a virtual world. You'll find you can accomplish some surprisingly powerful results. ■



CLOUD COMPUTING

2020



KATELYN SULLIVAN
Partner Development Leader

Katelyn Sullivan, CPA, leads the Partner Development team at OnPay, which received a five-star review from CPA Practice Advisor and Editors' Choice from PCMag. Prior to joining OnPay, Katelyn spent seven years with Ernst & Young focusing on technology adoption and process improvements for business clients. She can be reached at partners@onpay.com.

How to make payroll part of your practice

By Katelyn Sullivan, CPA

Now that the October extension deadline has passed, tax season is finally over. After you take a minute to congratulate yourself for making it through, it will be a natural time to reflect on how you can improve your practice and deliver more value to clients next year. For many accountants, that may mean looking at adding services like payroll to your roster.

After all, business owners who do payroll themselves spend an average of 18 hours a month paying employees and filing employment taxes. Given the taxes involved, it shouldn't be surprising that 38% of them expect their accountant to handle their payroll, according to our 2019 Small Business Finance and HR Survey.

If you're thinking about adding or expanding your payroll practice, here's what you need to know.

Why add a payroll service?

When a business decides to hire an accountant, they say the top benefits are having more time to focus on their business, saving money, and reducing stress. By offering payroll services, you can meet all three of these needs.

Adding payroll is a natural extension to your existing services. It also provides the opportunity to have consistent check-ins with clients and get better visibility into key aspects of their finances (like cash flow and expenses). You'll be able to play a more strategic role, and there will be fewer surprises next tax season – for everyone.

Three models for providing payroll services

Depending on how much effort you want to dedicate, there are three approaches to how your firm can add payroll:

Run payroll for clients: You manage payroll for the client, including entering data and processing individual pay runs. While it does require a higher level of responsibility on your part, you'll have the most insight into your clients' business and cash flow, and it has the greatest potential for revenue.

Monitor clients' payroll: Clients are the ones responsible for managing and running payroll, but you'll still be able to review pay runs and import expenses into the GL. This approach gives you a high level of transparency and client contact, but there's not as much work to do (or bill for).

Refer clients to a provider: If you vet payroll providers for clients, you can help them make a great choice and steer them toward a solution that works well for you. You'll save time (and tax notices) by cutting down on mistakes, but you won't have as much visibility into clients' finances. And there's still some potential for earning commissions.

However you choose to approach it, choosing a payroll system that syncs with your preferred accounting software will limit errors and make bookkeeping easier. The best payroll software will easily integrate with platforms like QuickBooks or Xero by mapping payroll-related expenses directly to the right accounts in the general ledger.

Building a stronger relationship

In our research, small business owners told us that accountants are the advisor that they trust most for advice relating to their business – more than their lawyer, banker, or personal network.

Nonetheless, 23% of them also said it was likely they would switch accountants within the next year. Studies have shown that the cost of obtaining a new client is at least five times more than the cost of retaining an existing client, so it makes sense to maintain and build upon long-lasting relationships with clients you already have. Our data also shows that clients who are more satisfied with the range of services you provide are more likely to remain with you for the long haul.

Offering payroll services to your clients is a win-win: You'll free them up to focus on running their business while simplifying bookkeeping, reducing errors, and opening a new revenue stream for your firm. While every client has different needs and expectations from you, it's worth asking how they're running payroll now and whether it's something you can take off their hands.





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The year 2020 hasn't been easy for anybody. Individuals, families and businesses have all had to make major adjustments in a year best, and frequently, described as uncertain. For the accounting industry, much of that uncertainty has led to an evolving relationship with clients as well as with colleagues, partners and even friends.

For Joel Hughes, CEO of Right Networks, 2020 has presented not only challenges but opportunity as accounting firms have come to embrace the cloud rapidly and with enthusiasm. Here, Hughes answers questions about 2020 so far and where the cloud and accounting as an industry are heading in the future.



JOEL HUGHES

Chief Executive Officer,
Right Networks

Joel is responsible for setting the company direction and leading the successful execution of that strategy with the Right Networks leadership team. As part of that strategy, he has led Right Networks to multiple years of mid double digit growth and engineered the successful acquisition of multiple firms that have increased the value Right Networks is delivering to clients. He has an extensive track record of building and growing businesses and has deep knowledge in corporate strategy and team building.

Prior to Right Networks, Joel was SVP of Emerging Business at Constant Contact (acquired by Endurance International Group) where he grew the Single Platform unit from \$2M to \$20M over four years. As CEO at NMS Communications, Joel led the transformation of a business unit into the stand-alone public company, LiveWire Mobile.

Q: Let's start with the industry. What are the biggest changes in accounting you've seen so far in 2020?

A: This year, we've seen firms rapidly continue the trend of becoming valued advisors for the companies they serve. CPAs have embraced client accounting and advisory services, or CAAS, as a core business model, by helping their clients manage PPP loans and plan financial survival strategies, among other essential tasks. They've become trusted financial advisers for their clients rather than just the people who do their taxes.

Q: What kind of shift in technology have you seen this year?

A: I can't think of another time in my career when there was such an abrupt shift as there was in March. All of a sudden, everybody was working, schooling and even socializing from home. It was as if all of the use cases we'd ever presented for moving to the cloud were not only present but suddenly required. Working together remotely and securely was no longer a perk or nice to have. It was an absolute

necessity. Fortunately, we were there to respond not only to our customers but also to firms that suddenly realized they needed the flexibility and security the cloud has always provided.

Q: What are the biggest issues you see in the fourth quarter and the year ahead for CPA firms?

A: The situation with public health is likely to remain unpredictable, which will have firms continuing to spend significant time in an advisory capacity as trusted partners for their clients. But pandemic or no pandemic, CAAS is here to stay, and those firms that don't develop CAAS expertise will soon fall behind those that do. Firms have to continue to find ways to broaden and increase the value they deliver for clients. On the technology side, working at home, at least to some extent, is unlikely to go away now that so many firms have done it and like it. We've shown inside Right Networks, and we've seen from our clients, that companies can work remotely—and securely, which is critical—and not miss a beat. It's cliché to say this, but this really is a new normal. We're ready for it, and so are our clients. ➔

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CLOUD COMPUTING

2020



AMY MURPHY
Group Marketing Manager, Intuit

Amy Murphy leads the Expert Segment marketing team within Intuit's Small Business Self-Employed Group. She is focused on helping accounting professionals understand the power of the QuickBooks Online platform, including QuickBooks Online Accountant, so they can grow their practices and scale their impact to help their small business clients succeed.



Q: How has cloud technology impacted the accounting industry and the services accountants deliver to their clients?

Cloud technology has enabled accountants to better serve their clients' ever evolving needs, at any time and from anywhere. Never has that been more important than now. Since the onset of COVID-19, accounting professionals have taken on expanded roles to help guide and advise their small business clients through this difficult time. And cloud technology has been instrumental in helping them successfully deliver on their expanded roles for their clients.

Cloud technology helps accountants be more efficient, giving them more time to assist and advise. It also helps accountants scale their impact, enabling them to identify trends based on client data so they can provide rich, strategic guidance that can make a significant difference in the ultimate financial health of a small business.

Q: How have new technologies like automation and AI merged with cloud computing to help accountants and bookkeepers with small business customers?

This year, more than ever, we've seen how important it is to be efficient with our time. In 2020, accountants have had to work around the clock to adjust to new legislation and deadlines, knowing their clients are counting on them to have accurate, up-to-date information.

Cloud computing enables robust AI, machine learning and automation capabilities so accounting professionals not only can streamline workflows but also help their small business clients succeed. With our integrated QuickBooks Online platform equipped with AI and automation capabilities across payroll, accounting and QuickBooks Capital, QuickBooks was able to help more than 37,000 small businesses apply for the Payroll Protection Program, resulting in more than \$1.2 billion in loans provided.

Other examples of how QuickBooks is harnessing the power of AI and automation to help accountants get more done faster in their day-to-day tasks so they can scale their impact include:

- **Month-end review:** a new feature in QuickBooks Online Accountant that helps accounting firms close client books with more accuracy and in less time by automatically identifying common issues and hard-to-find anomalies.
- **Statement auto-import:** a new feature that automatically delivers bank statement

information needed to get client books done. Currently, QuickBooks supports more than 1,500 banks, with more banks added all the time to deliver this invaluable automation option for accountants and their clients.

- **Automating accounts payable processes:** key integrations with Melio, a free, bill-pay capability embedded directly inside QuickBooks Online; and Bill.com, which automatically syncs with QuickBooks and provides advanced bill payment and workflow automation capabilities directly in QuickBooks Online Advanced, provide the flexibility and automation needed to manage bill payments.

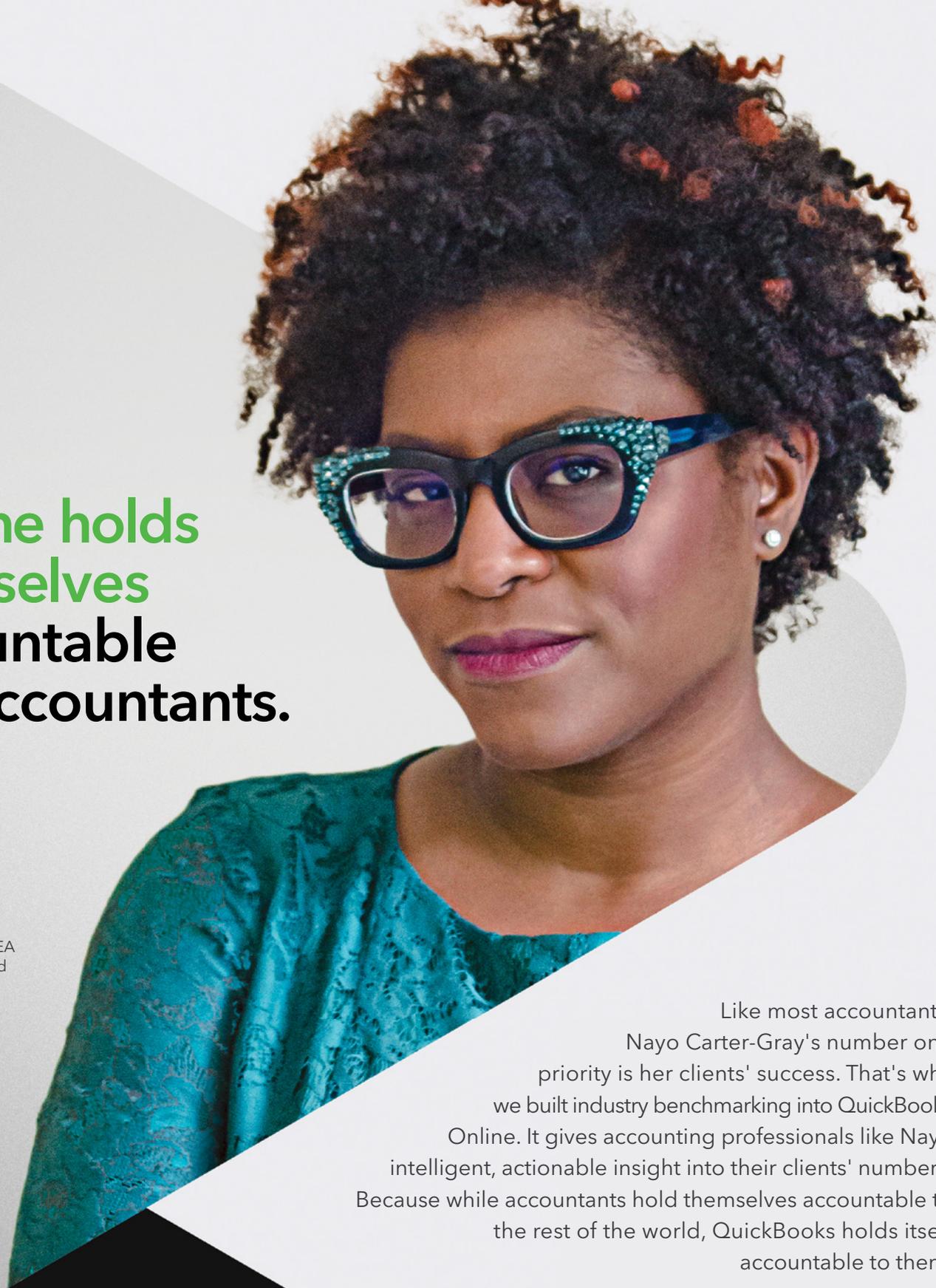
Q: How can technology help accountants best guide their clients and position them for success, particularly during this challenging time?

Accountants have rapidly evolved into business advisors for their clients as they've stepped in to forecast cash flow, find ways to pay for critical expenses, and provide guidance around even more non-accounting business needs. As a result, we've expanded upon our already robust offerings that help accounting professionals advise their clients, particularly during this time when small businesses need it most. Recent examples include:

- **The Performance Center,** accessible through the Reports tab in QuickBooks Online Accountant, allows accountants to provide even more personalized insights to their clients. The Performance Center calculates key ratios, provides metrics, and visualizes clients' financial performance, automatically and right inside QuickBooks.
- **Industry benchmarks,** in the Performance Center, helps accountants quickly benchmark client performance against similar companies using the power of aggregated, anonymized QuickBooks data.
- **QuickBooks Online Advanced Custom Fields** are now supported in more reports, and soon will have a brand-new management UI to easily derive more insights to guide clients.
- **The Cash Flow Planner** within QuickBooks Cash uses machine learning to provide a 90-day projection of a small business's cash flow, which helps accountants and their business clients plan money in and money out scenarios appropriately.

Q: Where can accounting professionals get more information on how they can better serve their clients using the latest technology?

Visit <https://quickbooks.intuit.com/accountants/> for more information.

A portrait of Nayo Carter-Gray, EA, a Black woman with curly hair, wearing glasses and a teal top. The portrait is set against a white background with a circular cutout effect.

**No one holds
themselves
accountable
like accountants.**

Nayo Carter-Gray, EA
Baltimore, Maryland

Like most accountants, Nayo Carter-Gray's number one priority is her clients' success. That's why we built industry benchmarking into QuickBooks Online. It gives accounting professionals like Nayo intelligent, actionable insight into their clients' numbers. Because while accountants hold themselves accountable to the rest of the world, QuickBooks holds itself accountable to them.

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For accounting professionals

3 Digital Strategies to Improve Accounting Firm Agility *By Jodi Chavez*

GETTING AHEAD MEANS thinking ahead in the new normal.

If we've learned anything these past few months, it's that change is here to stay, which means your firm must be agile and able to respond quickly to whatever curveballs come its way. And from what we know about 2020 so far, curveballs will come.

Technology is the tool that will help you accomplish that aim most effectively, and adopting these three digital strategies should be your first priority as you set out to improve agility at your firm. Here's what to do.

1 BE PREPARED FOR QUICK CHANGES
To understand the importance of this organizational trait, look no further than the start of the pandemic. Workforces were thrust offsite seemingly overnight, and leaders who never would have dreamed of working from home in the past, suddenly found themselves at the helm of fully functioning remote teams.

now is not whether or not they can work from home, but whether or not they can work from home at maximum capacity over the long term.

Still, we've seen only a small percentage of companies with a mature processes in place for engaging, managing and developing agile workers, so doing so must remain a major area of focus going forward. Approach your agile workforce strategically to identify areas where you can improve efficiency for the future.

2 DEVELOP A LEARNING MINDSET
A learning mindset is the all-important glue that will hold your agile plans in place. You've laid the groundwork with your processes and set an organizational mission to respond better to change, but without making this crucial shift to your thought process, you'll never be able to reach peak adaptation.

A learning mindset will help you and your team frame setbacks as opportunities for growth and improvement — a positive spin you'll need in order to stay focused in the ever-changing new normal of today.

Plus, with the lack of skilled talent remaining a top challenge for accounting firms, it may be the only way to ensure your firm has support in the areas where it needs it most.

Online learning sites like Coursera offer thousands of courses that employees can take from home to ensure training and development stays on track — even if you can't all be together onsite. With so many

digital options available, there's no excuse not to prioritize skilling initiatives this year. Doing so will ensure that your firm is equipped with the flexible, tech-savvy talent it needs to succeed — no matter the state of the hiring market.

3 UPGRADE YOUR SERVICES TO THE CLOUD
With COVID-19 cases spiking, and treatments and vaccines in limbo at various stages of development, there really is no telling how long your operations will have to remain remote.

That's why the best way to keep both your team and your clients safe is by adopting cloud-based technologies that can reduce the need for face-to-face interactions. There's a whole host of advantages that cloud technologies can bring to CPA firms — especially during tax season — like enhanced security, better time efficiency and fewer errors to name a few.

For CPA firms today, the path forward is clear: digital solutions are the key to agile operations. By incorporating these tech-forward strategies into your new normal business plan, you can start rebuilding your workforce with the tools it needs to succeed in our rapidly changing new normal. ■

The path forward is clear:
digital solutions are the
key to agile operations.

If that was you, then you likely took a big step toward embracing agility — but there's still more you can do. The difference-maker for companies

As Group President, Randstad Professionals, Randstad Life Sciences and Tatum, Jodi Chavez oversees the field organization and provides strategic direction for Randstad Life Sciences, Randstad Professionals and Tatum.





ROMAN H. KEPczyk, CPA, CITP
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How to Work Securely at Home During the COVID-19 Crisis

THE COVID-19 PANDEMIC required accounting firms to go 100% remote virtually overnight. While a good number of firms were either already in the cloud, had implemented cloud-enabled applications, or had a structure to support remote workers, there were many personnel that had never actually worked remotely and were simply not prepared to do so.

In the rush to get those users connected, some firms took shortcuts which could expose the firm to security threats. Since protecting client data is a fiduciary responsibility for firm owners, management should regroup virtually to ensure that proper remote work protocols are in place. Below we list ten considerations for working securing during this crisis.

Comprehensive Communications:

In times of uncertainty, leaders must lead. This includes transparency in communications with both clients and firm personnel. Firm leaders must provide assurance that work will continue to be produced and that security and confidentiality of client information is paramount as people work remotely. Owners should communicate to clients and staff how client information will be protected through the use of secure email/portal solutions and explain processes for delivery of physical documents either through the mail or secure onsite protocols.

Secure Video Calls: Communicating face-to-face via video conferencing can help firm personnel deal with imposed isolation by adding familiarity to interactions. If your firm utilizes Office365, Microsoft Teams is an effective tool for video conferencing as well as messaging and on-screen document sharing, (as long as everyone has access to a video camera, microphones and speakers). At the start of the pandemic many firms jumped on the free version of Zoom without training, exposing security concerns. Firms can make Zoom somewhat more secure by requiring a password,

mandating that all participants be first sent to a virtual lobby to then be admitted by the administrator/host, and only allowing the administrator/host's screen to be shown. Personnel should also be reminded not to share screenshots of video calls on social media as the meeting access name can be exposed. It is also important to only run application updates directly from the vendor websites as hackers are sending out fake software update links.

Secure Logins: Many firms continue to utilize antiquated rules on passwords (8 alphanumeric/special characters) which today's hacker tools can compromise. Firms should transition to very complex passwords of at least 12 characters or "pass phrases" (consisting of at least three random words) and also require multi-factor authentication to connect. Passwords should not be utilized on more than one account so using a password wallet such as LastPass, DashLane or Keeper will help keep them secure.

Secure Workstation: Employees should work only on firm-assigned equipment, but we heard of many personnel using their personal home computers. This should not be allowed if any other family members also utilize that device, and definitely not if it is still running Windows 7. Firms should verify any remote computers have automatic updates configured, particularly for the Windows operating system and antivirus/malware.

Secure Workspace Setup: The home workspace should be set up in a private area where client discussions

and onscreen information can be kept confidential. Ideally, all work should be done only onscreen with all data and applications residing in the cloud or remotely accessed on the firm's servers. If a local printer is used, all printouts containing client information should be shredded.

Secure Connection: Firm personnel should utilize a virtual private network (VPN) when connecting to firm resources through the internet and preferably be physically connected by Ethernet cable directly to the router in the house or digital cellular network if the speed is adequate. If WiFi access must be utilized, the firm should verify that the employee's WiFi router is secure by first updating the firmware on the router and changing the password. It is also advisable to segment business access from family/guest use along with "IoT" devices such as smart speakers, doorbells, video cameras, etc.

Secure File Access: All firm personnel should be trained on educating clients to utilize the firm's secure email, portal and digital signature solutions for the secure transfer of source documents and firms should disallow the use of USB flash drives for any file transfer (preferably disabling the USB ports on firm-owned devices).

Security Policies: The firm should immediately review internal policies to ensure that they have been updated to address remote work requirements including client confidentiality, proper equipment configuration, secure network accessibility, team and client communications, as well as hours of availability when at home.

Security Awareness/Training:

Information security is an ever moving, rapidly evolving threat, particularly in an unfamiliar "remote" environment, so it is imperative that firms keep personnel abreast of current threats by having the IT Team do security briefings. Employees should be educated on social engineering practices that hackers are using to get personnel to compromise the firm's security as well as to be aware of increasingly sophisticated phishing and ransomware scams. Red flag suspicions should be raised whenever a message seems out of character, "urgently" requests financial or personal information, or asks the recipient to click on a link or go to a website, prompting them to contact the alleged sender to verify first.

COVID Scams: Personnel should also be made aware of hackers utilizing COVID schemes to trick staff members into downloading malware through "FREE" tools and resources for government loans, stimulus payments, and summaries of regulations. Accountants should only go to trusted, verified websites for such information and to not download data through email links.

While no one can predict the long-term impact of the pandemic, accounting firms are finding that remote work capabilities are not only a required, but highly viable solution and may well become the new norm as long as it can be done effectively and securely. ■

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From Trend to Must-Have

CONTACTLESS DELIVERY, CURBSIDE pickup, lockers and drop boxes. These are the buzz words for businesses of all shapes, sizes, and industries in 2020. Running a business virtually became a necessity this year. The ability to bring products and services to market both seamlessly and securely shifted from a trend into a must-have.

Fortunately, accounting firms do not need to re-invent the wheel in 2020 and beyond. To serve clients virtually, we simply need to leverage a technology that most firms of any size already have—but may not have been leveraging to its fullest potential. Portals, their many variations and add-on services, are the de facto highways and warehouses for today's accounting firms.

Additionally, the ability to directly connect with your client's portals provides tremendous opportunities to keep your clients' data secure and protected via electronic transmission. Emailing documents to a client opens doors to compromising personally identifiable information or PII, which should be avoided at all costs. In several states, this is considered a data breach—and your entire firm can be held responsible.

Given the exposure, portals are low hanging fruit in 2020. To fully utilize the power of portals, one goal is to see that 95% of your clients are introduced to portals and using them. After all, most states already require it, and for most of 2020, when you went virtual overnight, it was the only option. Why go back?

Firms have felt for years that portals are a technology that their customers will resist or do not want, despite the fact that the rest of the world has shifted onto portals one after the other. One industry after another—legal, insurance, healthcare, financial services, and so on—have shifted to web-based portal systems to send and receive documents. So, accounting does not need to buck a trend, it just needs to harness it.

When it comes to portal technology, solutions have been around for more than a decade. These are technologies

at maturity with wide adoption and acceptance. We see platforms that are stable and relatively low-cost with widely proven enhancements and fantastic end-user acceptance and usability.

The features include robust, safety-rich integrations with other software applications. Cross-integrations work with phone systems, mail systems, websites, and easy ways for your clients to upload documents from laptops, desktops and even smartphones. Now is the time to stop clients from sending you text messages, picture by picture, of tax documents with their social security numbers....

Another key aspect of any portal solution is integration with your overall technology stack. Odds are that you have (or should have) a document management system that houses, secures and organizes all that client data. The right portal can tightly integrate with your document management system. Those portals are the choice of 9 out of 10 firms regardless of size. Given the importance of these two technologies, it is commonplace for accounting firms to choose document management systems in tandem with their selection of portals.

Another driving factor behind which portal is right for your firm falls under the type of services or work your organization most commonly forms. If your practice focuses on tax returns, your portal choice may

be narrowed to a few large players with solutions in that particular practice area. If you are doing a large amount of bookkeeping and monthly write-up or payroll services, portal vendors in that niche may suit you, because they are geared on pricing and features for the exchange of large amounts of documents on a daily basis.

Below are key trends we are seeing from the leading portal providers:

- Cloud hosted – on premise hosted options going away
 - Mobile apps a must
 - Deeper integrations
 - Ability to directly pay invoice via portal
- Features all portals have:
- Custom URLs for the firm's branding
 - Large and multiple file support
 - Strong encryption and security

One final trend is an ability for clients to pay their invoices directly through the portal. Everyone wants to get paid sooner, easier, and quicker. Providing clients with a seamless experience, to review documents in the portal and pay with one or two clicks, is a long-awaited feature. When it comes to portal platforms in 2020, most firms are already leveraging one. If you happen to be a laggard in adopting portal technology, or are due to revisit the category, now is a buyer's market. There are more and more choices and niche players to consider.

If you find yourself ready to buy or reconsider an older platform in this category, 2020 is the year for you to get on board with the latest portal technologies. This review will help guide you through understanding the different solutions—

and which ones may be the best fit for you. For technophiles in accounting, this guide will help you better appreciate the features and functions of the portal you currently have—or it may compel you decide that it is time for an upgrade. Again, the software development lifecycle in this realm has introduced a number of new players, new pricing, and new ways of serving up modules and bundling.

In this issue, we reviewed some of the leading client portals in our space, specifically designed for professional accounting firms. The products include:

- AccountantsWorld Cloud Cabinet Client Portals
- CCH Access Portal
- Citrix ShareFile
- ImagineShare from ImagineTime
- SmartVault
- Thomson Reuters NetClient CS

At the end of the day, our industry for the foreseeable future still revolves around us getting a large number of documents from our clients, full of sensitive information, and providing them a deliverable that still contains highly sensitive PII. Whether that PII is personal information or, really, the intellectual property of their overall business or personal lives, it deserves the greatest care and diligence—especially in the face of today's cyberattacks.

Take steps in 2020 for the times to come. The future will be faster, smarter, even more prone to hackers, with clients getting more sophisticated in their expectations. Virtual accounting is a trend that has arrived. ■

	Mobile App	Invoice Payment	Custom Branding	User Interface Options	Large Files	Multiple File Types	Batch Upload	Security	Vendor Integration	Other Integration	Signature Functions	Training & Support	Hosted	2020 OVERALL RATING
CCH ACCESS PORTALS	X	X	X	X	X	X	X	X	X	X	X	X	X	★ 5
CITRIX SHAREFILE	X		X	X	X	X	X	X	X	X	X	X	X	★ 4.5
CLOUD CABINET			X	X	X	X	X	X				X	X	★ 4.75
IMAGINESHARE	X		X	X	X	X	X	X	X	X	X	X	X	★ 4.5
NETCLIENT CS	X	X	X	X	X	X	X	X	X	X	X	X	X	★ 4.75
SMARTVAULT	X		X	X	X	X	X	X	X	X	X	X	X	★ 4.5

CCH Axxess Portal

CCH Axxess Portal is a cloud-based file sharing system best-suited to firms using CCH Axxess Document as the tight integration means these solutions function like one streamlined application. The system also integrates with other components of the Wolters Kluwer professional accounting suite. One strong feature

<https://taxna.wolterskluwer.com>

of this solution is its ability to let clients pay their invoices online, which can be achieved via integration with CCH Axxess Practice.

CCH Axxess Portal is an essential solution for firms using other CCH Axxess programs, to enable digital sharing of files with clients. Pricing varies based on



2020 OVERALL RATING

5

Read the full review for this product online at:

www.CPAPracticeAdvisor.com/21157282

users and other applications, so pricing is available through Wolters Kluwer.

Citrix ShareFile

Citrix ShareFile provides document management and client portal functions for professional firms and can be scaled to meet the needs of most sized entities. The system also offers integrated email, and file syncing functions that enable working while not connected to the internet, and then syncing folder contents when back online.

www.sharefile.com

The system is available in three versions: pricing for the Standard Plan is \$50/month for up to five users; the Advanced Plan is \$77/month for five users and includes key product integration and encrypted emails; the Premium Plan is \$122/month for five users and has custom workflow capability and the ability to request and send electronic signatures. The more advanced,



2020 OVERALL RATING

4.5

Read the full review for this product online at:

www.CPAPracticeAdvisor.com/21157285

optional Virtual Data Room is \$388/month. All plans offer unlimited storage capability, and additional users can be added for an additional monthly fee.

Cloud Cabinet

www.accountantsworld.com/CloudCabinet.html

Cloud Cabinet Client Portal is ideal for small firms already invested in the AccountantsWorld ecosystem. Due to its tight integration into their other solutions, AccountantsWorld client portals are designed to integrate with other AccountantsWorld applications including Accounting Power, Website Relief, Practice Relief, After-the-Fact Payroll, and Payroll Relief.

Customers can easily transfer files from these applications directly into Cloud Cabinet. You may find that third-party integration is limited, but the product does play nicely with QuickBooks, Sage 50, and some other well-known bookkeeping brands.

Contact AccountantsWorld directly for pricing information or purchase Cloud Cabinet from the



2020 OVERALL RATING

4.75

Read the full review for this product online at:

www.CPAPracticeAdvisor.com/21157281

AccountantsWorld website. All AccountantsWorld applications come with a 60-day money back guarantee.

ImagineShare

ImagineShare is the accounting firm portal system from ImagineTime, and a part of its suite of practice management solutions. The system is best-suited to small and mid-sized accounting firms, and can be used as a stand-alone portal or as part of the suite, which includes options for project management, due date tracking, time and billing, payment processing,

www.imaginetime.com

e-signature, CRM, reporting and analytics.

The client portals can be used on all major browsers and operating systems, allowing use on computers or mobile devices. As with all portals, ImagineShare's purpose is to enable secure sharing of documents both ways between an accounting firm and its clients.

ImagineShare costs \$25/user, per month. The



2020 OVERALL RATING

4.5

Read the full review for this product online at:

www.CPAPracticeAdvisor.com/21157287

comprehensive ImagineTime Practice Management suite, including the portal system, time and billing, and due date management, costs \$70/user, per month.

NetClient CS

NetClient CS is the accounting firm client portal system from Thomson Reuters, and part of the vendor's broad firm management suite that includes applications for tax, accounting, payroll, workflow, document management and other core practice areas. NetClient can be used as a stand-alone system, but

cs.thomsonreuters.com

is really designed and optimized to be used as an integrated part of the suite.

NetClient CS Portals from Thomson Reuters provides a comprehensive solution especially well-suited to firms using the tax, payroll or other components of the CS Professional Suite. Pricing is dependent on



2020 OVERALL RATING

4.75

Read the full review for this product online at:

www.CPAPracticeAdvisor.com/21157288

several factors, including users and other applications, so firms should contact Thomson Reuters for a quote.

SmartVault

SmartVault is a file-sharing and document management system designed for accounting firms and their clients. The system is geared toward firms of 5-to-50 staff, supporting the transfer of all file types, with a focus on accounting, tax and payroll documents. The system integrates with QuickBooks, Xero and Lacerte.

SmartVault is available in four versions: Starter,

www.smartvault.com

for small teams or micro businesses, which is \$16 per user per month; Professional, for external collaboration and advanced audit needs, which is \$20 per user per month; and Enterprise, which includes advanced customization, integration, and workflow, and which is priced on a custom basis. An Accounting Pro plan is also offered, designed for tax, accounting, and full



2020 OVERALL RATING

4.5

Read the full review for this product online at:

www.CPAPracticeAdvisor.com/21157289

services firms, which is \$40 per user per month.

QuickBooks Connect 2020: *We Go Further Together*

WHETHER YOU ARE new to the QuickBooks Connect conference or attended any of the annual events over the last several years, our world has changed -- and so has QuickBooks Connect. With the theme “We Go Further Together,” QuickBooks Connect 2020 will be a free, virtual experience that proves to be very different from sitting through another video call. It takes place on November 18 and you can register at QuickBooksConnect.com.

CONNECTION, EDUCATION, INSPIRATION

Similar to how you re-examined your own processes to work with your team and clients remotely over the last several months, Intuit reimaged the ways to share information to help you learn, network, and scale.

roadmap for success. After attending sessions, apply takeaways right away in your practice.

- **Inspiration:** Stimulate creativity, innovation, and motivation to re-energize and keep you informed, including talks and presentations delivered by keynote speakers.

One element that you can look forward to is Braindate Virtual — one-on-one video sessions you can schedule with experts in all areas of practice management, customer care, and more. You can browse and pitch topics for a Braindate, via an online marketplace, to schedule time

with other attendees. You can also host or book a group Braindate for small meetups of up to five people.

“After attending QuickBooks Connect 2020, accounting professionals will walk away with actions they can implement right away in their practices,” said Donna Duncan, senior manager, Intuit. “They’ll also have the opportunity to connect with each other, partners, and experts, as well as Intuit’s own product managers to get a first-hand look at new innovations.”

Every element of QuickBooks Connect 2020 is designed to connect, educate and inspire attendees. The content slated for November 18 includes:

- **Connection:** Encourages relationships and networking with others, whether with fellow attendees, partners, and leading experts in all-things accounting. While networking cannot be done in person right now, it can be done effectively online.
- **Education:** Receive knowledge, tips, processes, and advice to create a

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

5 DAYS OF CONNECTION

In addition to the November 18 event, the virtual event platform will be open for five days so that you have more opportunities to book a Braindate and connect with one another. The Partner Gallery will also be open for you to connect with our partners to watch demos and learn about products and services to help you streamline your practice, build your tech stack, and find new ways to work.

HOW TO REGISTER FOR QUICKBOOKS CONNECT 2020

Visit QuickBooksConnect.com to register now for the free event that takes place on Nov. 18. You are encouraged to check the website regularly, as new speakers, sessions, and more information are added.

“All of us have had to learn how to pivot during this time, adapting to new ways of thinking and delivering services to our clients and customers,” said Duncan. “We’re excited to be bringing a QuickBooks Connect experience that will be rewarding and memorable, and of course, safe.” ■



The ProAdvisor
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Boo! 12 Social Media Tricks to Avoid

By Becky Livingston

CHOOSING A SOCIAL media platform might feel a little like bobbing for apples. When you start the process, you're unsure if you're going to succeed. Being active on at least one platform where your target audience resides is key. But, what should you sidestep when it comes to your firm's social media strategy?

Here are a dozen bad apples you'll want to avoid.

- Jumping on a trending topic/meme/hashtag without doing research beforehand. Find out what the image, hashtag, or topic is about; how it aligns with your brand, and; how it could be construed by your audience.
- Posting with typos and grammatical mistakes or abbreviations could be misinterpreted.
- Confusing company accounts with personal accounts and posting on the wrong one. Using a scheduling tool can help you avoid making this mistake.
- Sounding too salesy. Pushing promotions and sales content often will sour your audience and potential clients.
- Ignoring comments is bad business. Social media is about engagement and creating relationships. Responding to people's comments builds relationships social media users seek.
- Being active on too many social media platforms. Identify where your target market is active and focus your efforts there.
- Buying followers could be ghastly. Sure, it might increase followers, but ROI will be the casualty.
- Neglecting a variety of media in your posts. Mixing media helps to create interest in your posts and keeps followers engaged.
- Presenting an impersonal profile. Social media users want to engage with a human, not robots. Make your posts relatable, fun, and friendly.
- Doing everything yourself. Finding the

right help can make all the difference in your social media efforts. Social media may be free, but it's time consuming, takes energy, and requires creativity. If you're lacking in any of those areas, consider outsourcing this task.

- Posting only your own content. It may sound counter intuitive, but sharing other people's content demonstrates the "social" aspect of social media. It also broadens your brand reach.
- Forgetting to listen. The more active your brand becomes the more people will talk about it. Create a Google Alert to receive notifications whenever your brand is mentioned online. If you're using a scheduling tool, you can establish triggers for your brand, products, or services. You can even "listen" for the competition.

What can you do to avoid these blunders?

- Prepare a social media content schedule. Define the day(s) of the week and time(s) of day you will post. Remember, you can post content more than once in a month, e.g., in the morning one week and again in the evening 15 - 20 days later. Use a different image and headline for each post to draw in more readers.
- Create a short list of hashtags, such as #Accounting, #Bookkeeping, #SmallBusiness, #Finance, #Audit, #ERISA, #ConstructionFinance, and more. A tool like RiteTag is great for developing the list. Then use up to three hashtags in a post. Instagram is the exception. You can add up to 11



hashtags effectively.

- Develop a monthly content theme to focus your efforts, e.g., January is financial planning. February is tax tips. March is employee classification, etc.
- Look at trending topics and search your website content to see if you have something to share. Be sure to use the trending topic hashtag. Word to the wise: monitor trend throughout the day to ensure it doesn't impact your brand.
- Use a graphics tool and/or royalty-free image site to help you build stand-out images and video that can go with your posts. Canva.com and Pixabay.com are terrific resources.

Social media doesn't have to be scary. By mixing a potion of entertainment with education, you are providing valuable information in a way that makes people want to come back for more. ■

Becky Livingston is the President and CEO of Penheel Marketing, a NJ-based firm specializing in social media and digital marketing for CPAs. With over 25 years of marketing and tech experience, she is the author of "SEO for CPAs - The Accountant's SEO Handbook" and the "The Accountant's Social Media Handbook." In addition to being a practitioner, she is a dog lover, an active on the Association for Accounting Marketing (AAM) social media committee, an adjunct professor, and a speaker/trainer. Learn more about Becky and her firm at <https://Penheel.com>.

Personal Fitness and Health

THE PANDEMIC HAS resulted in lifestyle changes for many. In addition, the focus on health has all of us thinking more about how we take care of ourselves. We thought this would be a good time to survey our *CPA Practice Advisor* community and find out what they are doing to stay healthy and in good shape. If you're looking for a way to get started with fitness tracking, an alternative to the gym, or just some good tips on staying healthy, these suggestions will give you the advice you need.

Michael Barton, partner at Petrow Kane Leemhuis, told us, "I've been using my **Fitbit** app more than ever since the pandemic started. From food intake to water consumed. It's also useful how it tracks my sleep. All of that info is useful during a stressful time!"

Stacy Kildal, owner, Kildal Services, uses **MapMyRide**, "to track my 100+ [bicycle] miles per week and now that the weather is getting too cold to ride my fav routes, I'll be using my **Cycleops Trainer** and the **Streaks Workout** app."

Melisa Galasso, CEO of Galasso Learning Solutions and director, audit professional practices group, at Cherry Bekaert, said, "I use the **Beachbody on Demand** app. It gives me options for various exercises that can be done anywhere. I can choose between cardio, weight training, running so I never get bored. I also can choose based on what I have available where I'm at. It's especially great for travel so I can keep my routine. It's been great during COVID. Plus it tracks progress which is very encouraging!"

Scott Hoppe, principal at Why Blu, recommends **Strava**, and so does **Kevin Bong**, co-founder at AuditFile. "Strava is an app for tracking exercise which incorporates social networking features," said Bong. "It is mostly used for tracking and sharing runs, bike rides, hikes, and walks using GPS data."

Donny Shimamoto, managing director at IntrapriseTechKnowlogies, told us, "I like using **Aptive**. It has a good mix of meditation, cardio, and weights-based training. It also lets you schedule when you want to do stuff and you can choose from a variety of instructors and music depending on your mood for the day."

"I love multi-tasking hacks, so I looked for a workout app that accomplishes more than one thing very quickly," said **Jackie Meyer**, CEO of Meyer Tax Consulting. "I came across **Splits training** (freemium version) that has a daily workout, geared towards doing the splits in 30 days (fit and flexible)!"

Kristin Ingram, clinical instructor of accounting and MSAT director at University of Hartford, told us, "I'm using an app called **99 Walks**. It allows you to set your personal walking goal for the month and if you meet it, they send you a bracelet with that month's theme. It's really motivating and the community is fantastic."

Your priorities can change when you're surrounded by fires in the Napa Valley. Just ask **Geni Whitehouse**, countless of communication at Brotemarkle, Davis & Co., and instructor at the Sonoma State University Wine Business Institute. "We are pretty attached to **AIRVisual** out here due to recent events. I rely on **Insight Timer** for my mental fitness – it has guided meditations, training and music plus a timer that starts and stops with music of your choice. Other than that I check the **iPhone Health** app for a record of steps and other info."

Caleb Jenkins, leader of client accounting services at RLJ Financial Services, said, "I haven't been one to keep track of my physical exercise in the past but I recently decided to track my bicycle rides ever since I moved out on my own last month. I've been using **MapMyRide** to keep track of my distance, average speed, and calories of my bicycle rides. I love the maps produced with the routes I rode which encourages me to share them with family/friends to keep me accountable to my exercise goals. There are a lot of great settings in the app to help maximize the outcomes of my rides."

Jennifer Wilson, partner and co-founder of ConvergenceCoaching, is well known around the profession for running marathons and generally making us all feel like we're



coming up short in the fitness department. Here are the apps she suggests:

- **Garmin** for tracking runs and hikes – integrates with my watch
- **Zoom** for attending virtual yoga, boot camp and Pilates (which we've done with our clients)
- **Calm** for meditation (mental health)
- **AllTrails** hiking app
- **Facebook** – I'm the administrator of the group Papillion Area Runners (PAR) and part of many, many other running groups (local, national and international) for motivation, sharing strategies, etc.

Garrett Wagner, CEO of C3 Evolution Group, told us, "In 2020, I try and always look for a silver lining, and the increase in remote work has left more time to get out and exercise. For me, my two main go to apps are my **Nike Run Club** app on my apple watch for getting out for a run and then my **Garmin connect** app when I want to get out for a couple hours on a relaxing bike ride to really unplug and relax."

Sandi Leyva, president of Accountant's Accelerator, provided three suggestions for us to try:

- I use the **7 Minute Workout** which does not need any equipment so it can easily be done in a hotel room. It's super efficient too.
- I have an app that goes with my **Polar heart monitor** heart monitor so I can tell when I get to my optimum heart rate.
- I use **AllTrails** and **Komoot** to discover hiking trails near me so I can plan a nature hike or run and not get lost :)

Samantha Mansfield, founder of Samantha Mansfield, LLC, uses the **Apple Fitness** app. "Though this is not a new app, they have added some nice new features: more workout types, ways to change your goals through the week, see a weekly summary through the week, etc. I find the challenges they give you each month helps me to mix up my workouts, and I appreciate the reminders to get moving."

Joy Lutz, founder of Aligned CPA, said, "I love using the **Noom** app. This app offers daily mindset topics around exercise and weight loss. It helps you to think about the positives, and to stay committed to your goals. Using the app has

helped me to move my body consistently."

Jacquelyn Tracy is partner at Mandel & Tracy, and chair of the AICPA Women's Initiatives Executive Committee. "My **Apple watch** is my first line of defense as I can track my progress throughout the day with just a glance. Plus, I love when I can see that I have closed all my rings! I am also a big fan of **MyFitnessPal**. The app allows me to track both my exercise and what I am eating and drinking. Many times it helps me budget my meals. When I know I am going to have a big dinner, I can plan breakfast and lunch to be something smaller or make sure I get out and move more during the day. It is very easy to use and coordinates with my Apple watch."

David Cieslak is the executive vice president and chief cloud officer at RKL eSolutions. He has two recommendations for us:

- **Runkeeper** – tracks my runs 3-5 mornings per week. Great way to track fitness progress (and let you know when it's time to replace your shoes)!
- **7 Minute Workout** – enter your fitness and motivation levels. The app then tailors and tracks a body-weight workout for you each day.

Blake Oliver, director of marketing at Jirav, told us, "The **Activity** app on my Apple Watch is what motivates me to get in at least 30 minutes of exercise every day. It also tracks my heart rate, even when I'm not exercising, which is how I was able to empirically confirm that the first 2020 presidential election debate was unusually combative — my resting heart rate jumped 67% during the last hour!"

Richard Roppa-Roberts, owner of Quasar Cowboy, offers kudos for the **Peloton** app. "The Peloton app has numerous workouts and ultimate flexibility. I don't even have a peloton, but I have recently begun using the app to find the 'perfect' workout for me. Sadly, not a single one of those workout routines involves cookies."

Nick Pasquarosa, CEO of Bookkeeper360.com,

agrees: "I recently got a Peloton and love that app."

Kelly Welter, partner at Serl Keeper Welter CPAs, chimes in: "I completely fell in love with the Peloton app about 6 weeks ago! It is \$12.99 a month for unlimited classes. They have a ton of live and recorded classes at all different levels, and multiple time lengths." In addition, Welter added: "We are huge fans of the Meditation, Yoga, Cardio, and Strength classes. They even have kid friendly classes for families to do as a break from virtual learning at home. There are also Running, Biking, Walking, Stretching, Bootcamp, Outdoor Running, and Cycling classes. We do it on the iPad or from the phone. My homeschooled teens start every morning alternating between a 20 minute Yoga or Meditation class. They even have challenges for people to compete with others and themselves. It travels with me everywhere!!!!"

Kacee Johnson, strategic advisor at CPA.com and founder of Blue Ocean Principles, weighed in on Peloton as well: "Peloton has been my life saver during the pandemic. It's not just for the bike, the app has outdoor runs, yoga, strength classes that you just cast to your TV and thousands of classes to keep you active without getting bored. I can take it anywhere with me and join different challenges based on my monthly goals."

Natasha Schamberger, CPA, CEO & president of the Kansas Society of CPAs recommends **EWG's Healthy Living App**: "The most powerful tool that can determine your health journey is what's on your fork. However, breaking down a label to know which ingredients are ok and which to avoid can feel overwhelming. The EWG's Healthy Living App does this for you and rates food products based on nutrition, ingredient concerns and degree of processing. This app gives you more knowledge so that you can make even healthier and better choices for you and your loved ones. Eat well, live well!" ■

IF YOU WOULD LIKE TO JOIN THE CPA PRACTICE ADVISOR COMMUNITY AND PARTICIPATE IN SURVEYS AND REQUESTS FOR INFORMATION, PLEASE SEND YOUR NAME AND EMAIL ADDRESS TO GAIL.PERRY@CPAPRACTICEADVISOR.COM.

AICPA Applauds IRS Temporary Acceptance of E-Signatures

In response to challenging remote working environments caused by the COVID-19 pandemic, the Internal Revenue Service notified its employees in late March that they may temporarily accept scanned or digital signatures as well as allow the sharing of certain documents via email. However, this relief from the “wet” signature requirements was severely limited in scope and did not include documents associated with return filings or extensions.

■ Following a letter submitted earlier this month by the AICPA requesting that the IRS expand the scope of the June 12th memorandum to all electronic file signature authorization forms and non-income tax returns, including paper-filed returns, the IRS issued a new memorandum allowing for a temporary deviation from the handwritten signature requirement for a limited list of tax forms. ■

REMOTE WORK TO CONTINUE

Companies are planning on retaining remote work options more than they did pre-pandemic once workplace restrictions ease, the Q3 AICPA Economic Outlook Survey found. So far, the shift to remote work hasn’t led to widespread plans for a reduction in office space, confirming that – while businesses will leverage the flexibility that remote working enables – physical office and collaboration workspace remains an essential part of the future-of-work landscape.

The greatest pandemic-related concerns that business executives cited for the next 12 months are safety of employees and customers (33 percent), uncertainty over stay-at-home restrictions (29 percent) and customer demand/ability to pay (22 percent), the survey found. Only two percent listed liability concerns as their greatest worry. ■

NEW PLATFORM FOR SMALL BUSINESS FUNDING

The AICPA, its business and technology arm, CPA.com, and fintech leader Biz2Credit are teaming up on a new platform, CPALoanPortal.com, to streamline the process for CPA firms advising small businesses.

The platform produces all government forms required under the PPP program, supports calculations on payroll

and other expenses, and produces a master report with the applicant’s electronic signature that can be delivered to the underwriting lender.

The PPP is part of the CARES Act stimulus package and was designed to help businesses impacted by the coronavirus pandemic to maintain operations and payroll. ■

BUSINESS EXECS HAVE LOW CONFIDENCE IN ECONOMY

U.S. business executives are feeling more optimistic about expansion plans and the outlook for their own companies over the next 12 months, yet still harbor deep concerns about the strength of the U.S. and global economies in the midst of a worldwide pandemic, according to the third-quarter AICPA Economic Outlook Survey.

Only 24 percent of business executives said they held an optimistic view of the U.S. economy over the coming year. That’s a slight increase from 20 percent last quarter, which represented the dimmest outlook for the United States since the fourth quarter of 2011.

Some 43 percent of survey respondents said their companies plan to expand in the next 12 months, up from 24 percent last quarter. Business executives’ optimism about

their own companies’ prospects saw a similar rise from 30 percent to 41 percent, quarter over quarter. Other key findings of the survey:

- Revenue and profit expectations have stabilized.
- 55% of business execs say companies have the right number of employees.
- “Domestic economic conditions” remain top challenge for businesses but “domestic political leadership” jumped four spots.
- Last quarter, only one employment sector was expected to show growth over the next 12 months. This quarter, it’s seven sectors, led by technology.

14% of companies say current cash position is either dire or concerning, while 85% say position is either strong or acceptable. ■

2020 George Willie Scholarship and Internship Recipients Announced

The AICPA has announced the five recipients of the 2020 George Willie Ethnically Diverse Student Scholarship and Internship Program. The George Willie program provides a scholarship up to \$20,000 and internship to five ethnic minority accounting students who intend to pursue a CPA. The recipients are:

- Tairu Jozaitis: OnTarget CPA; Purdue University (Northwest)
- Maria Moy: Boyum Barencheer; University of Minnesota – Twin Cities
- Audie Murphy: Aronson; University of Baltimore
- Thy Thuy Nguyen: Sensiba San Filippo; California State University, Los Angeles
- Amber Richmond: Reynolds, Bone & Griesbeck; University of Memphis

The program is open to ethnic minority students pursuing an undergraduate or graduate degree in accounting or an accounting-related major and who plan to sit for the CPA exam. Full eligibility requirements are available online. ■

AICPA and CPA.com Launch .CPA Website Domains

The AICPA and its business and technology arm, CPA.com, have begun an early-phase rollout of .cpa, a restricted Internet domain that allows CPAs to connect with clients and the general public with greater trust, security and verification. The restricted domain designated for the CPA profession is .cpa.

To apply, firms must be licensed and agree to use the domain they acquire. Licensed firms that apply during the early registration phase will be able to register their

existing .com domain using .cpa. Firms will be notified of the outcome of their domain applications no later than early November.

After the initial period closes on October 31, firms are free to apply for any available .cpa name on a rolling, “first come, first served” basis. In January 2021, the process will open up to include individually licensed CPAs. For additional information on the .cpa domain or to register for the webcast, please visit domains.cpa. ■



PAUL McDONALD

Senior Executive Director

Robert Half

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Modern technology makes it easy to work away from the office. The challenge is finding a daily routine that strikes a sustainable work-life balance. This issue is more pressing in the age of COVID-19. Shelter-in-place orders and the ongoing risk of infection have caused many firms to temporarily shutter offices and adopt remote working. Professionals have found themselves juggling all kinds of responsibilities, from home-schooling kids to caring for sick or vulnerable relatives.

One way to meet these challenges is to reorganize your workweek. And for many accountants, that means windowed work.

WHAT IS WINDOWED WORK?

Windowed work means breaking up your business day into two or three separate time slots, or windows. Traditionally, this hasn't been possible. When people have a long commute to the office, it's not practical to work multiple daily shifts.

But when you're working from home, this pattern makes more sense. Someone with commitments like childcare can benefit enormously from breaking their day into discrete windows. For example:

- Morning window: 7-10 a.m.
- Midday window: 12-3 p.m.
- Evening window: 6-8 p.m.

This kind of flexibility allows you to focus on work when you're at your most productive and least distracted. It also enables you to dedicate parts of your day to personal commitments.

Windowed work has taken off recently, with 79% of employers now offering flexible daily scheduling,

No Pane, No Gain: *The Benefits of Windowed Working*

TIMES HAVE CERTAINLY changed from working traditional 9-to-5 hours — and were changing even before the pandemic hit. Many of us have been accustomed to taking work home for years, using cloud services to log in remotely and swiping through our phones to check business emails on the go.

according to a recent survey from global staffing firm Robert Half. And the results are positive: 73% of employees said windowed work has improved their productivity.

Windowed work is a great deal for employers and employees alike, if managed correctly. Here are a few areas to consider when switching to more flexible scheduling.

KNOW YOUR BEST HOURS

Everyone has unique daily rhythms. Often, this is defined by external factors. For instance, if your kids are home learning over Zoom, school hours may create frequent distractions.

You also have your own internal rhythms. There are certain times of day when you're naturally more focused, creative and productive. If you leverage these power hours, you'll be at your best when working.

PLAN AROUND ESSENTIAL TIMES

Service continuity is the biggest challenge in windowed work. Clients expect you to be there during office hours to answer calls and respond to emails. Work with your manager and colleagues to ensure someone is always available to cover for you during office hours.

A related challenge is that many of the people you need to reach out to still work 9-to-5. You need to contact clients, tax authorities, service providers and other third parties with urgent queries, and that's difficult outside of working hours. The best approach is to schedule time-critical work for office hours so you can get answers when you need them.

What does your new windowed schedule mean for you, your team and your boss? If your first window ends at 9 a.m., is that a hard deadline, or can you work until 9:15? Can those reports wait until your evening window, or does someone need them sooner?

Good communication is the not-so-secret sauce of windowed work. Speak with your supervisor about guidelines, including their expectations for your productivity within each window. Next, talk to your colleagues to help make sure everyone's schedules sync up.

You should also be upfront with regular clients about your new work routine. It could reflect poorly on you and your firm if a client hears about your new hours for the first time from an email autoreply directing them to a colleague. When discussing your new schedule with clients, emphasize how it will be good for them, too. For example, if you work an evening window, you'll now be able to answer queries that come after hours the same day rather than the following morning.

HAVE A FOCUS FOR EACH WINDOW

Windows can include short, focused bursts of productivity if you plan them correctly. The best approach is to group tasks as much as possible so each window concentrates on one or two types of things. A typical schedule might look like this:

- Early-morning window: client reports
 - Daytime window — first half: phone calls and emails
 - Daytime window — second half: meetings and strategy
 - Evening window: analysis and planning
- If you know what you're going to

focus on in each window, you don't have to spend time prioritizing. Instead, you can get straight to work.

PLAN AHEAD FOR BUSY TIMES

Every practice faces schedule-busting events. Whether it's tax season, month-end close or meeting a client deadline, there are times when you simply have to keep going until the work is done.

These are what you might call known unknowns — you can't create a precise schedule for them, but you know they're coming. As such, you can build a certain degree of flexibility into your windowed schedule. Be clear about what each window means to you. For example, you may need to stop work at precisely 3 p.m. to focus on your kids. But perhaps you can extend your evening window to allow for some overflow.

THE FUTURE IS WINDOWED

Work practices have long been evolving, but it's clear that the pandemic has created new challenges and opportunities for employers and workers.

Business leaders are trying to do more with less, and this will remain the case so long as the economic outlook is uncertain. Employees, meanwhile, are increasingly focused on maintaining a good work-life balance. This is especially true of Generation Z and younger millennials, where only 22% said they prefer working 9-to-5.

Windowed work isn't a cure-all, but it offers benefits for both sides. Employers get the maximum productivity from each team member, while team members have greater flexibility to juggle responsibilities. If handled right, it's a win-win for everyone. ■

CPA Practice Advisor

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