

Completing Tax Season with Virus concerns

Although you may personally believe all of this concern is overblown, it doesn't matter what you believe, it matters what your clients and fellow employees believe. There is no downside to the following recommendations, just risk reduction and peace of mind for all involved.

Protecting your staff, their families, and clients:

- Immediately communicate to all clients and employees that in the interest of safety and health for clients and employees that you are taking specific precautions rather than incurring risk, however small it may seem
- Put a sign on outside door saying: No handshakes and please use hand cleaner as soon as entering building:
 - Put hand cleaner at entry
 - Put waste can at entry
- After entering building everyone including employees needs to clean their hands before proceeding further
- After a 3rd party enters and leaves, wipe down door handles and touched surfaces and don't touch the surface of the towel used to wipe down
- Consider leaving front door locked at all times-discuss in office and decide
- Immediately deep clean everything, wiping down desk tops, drawers, window ledges, cubicle tops and chairs, vacuum carefully
- Use hand wipes on outer doors of restrooms before entering and when leaving and dispose
- Use hand wipes on refrigerator doors, microwaves, tables, water cooler etc.
- Go thru fridge and throw away everything in there that is not eaten today, including condiments, containers and frozen items-it allows you to control new items and also gets rid of bank leftovers
- Sanitize all common items-particularly printers, copiers, fax machines and phones before and after every use
- When emptying trash wear disposable gloves and/or sanitize hands before touching face, clothing or surfaces
- Do not go out for lunch-bring from home or have delivered
- Have all office supplies and mail delivered
- Consider a work from home strategy (may not be workable this late)
- Make sure ill employees stay home-consider a more lenient sick policy

Protecting clients

- Implement a “no appointment” policy for the remainder of tax season
 - Mail ins
 - Email password protected items
 - Text document pictures
 - Upload to portal
 - Phone calls to obtain needed clarification
- Implement a “no appointment” exit strategy for the rest of the season
 - Phone calls to update final numbers
 - Electronic delivery of product via portals
 - Mailed returns

After tax season

- Avoid unnecessary travel until things clear up
- Plan to utilize many of the above changes in operation:
 - A no-appointment system
 - Web portals and electronic delivery
 - E-Signatures on 8879's and engagement letters
 - Work from home technology and systems-Microsoft Teams is a good starting point, but develop remote policies like from our Tech seminar
- Consider CPE via webinars