



NELSON CPAs

Tax Season Newsletter

January 2021

2021 TAX FILING SEASON & COVID-19

On March 16, 2020, Nelson CPAs closed its office to the public as a precaution against the spread of the coronavirus. The safety of our staff and clients continue to remain a high priority. Like other accounting/tax firms in the area, we have decided to continue to keep our doors closed to the public for the foreseeable future, including the upcoming tax season.

Please read this entire newsletter - it contains important information you need to know.

What about meeting with my tax preparer?

Phone calls (or Zoom meetings, if desired) will be our preferred method for meeting with clients. If you would like to talk with your tax preparer, call our office and the administrative staff will be glad to set up an appointment for you.

If you really want to have an in-person meeting there will be an additional charge of \$25 added to your bill. You will be asked to follow the guidelines we have set up to help prevent the spread of COVID-19. These include wearing a mask while in the building, using the hand sanitizer provided in our entry way, having your temperature taken, and filling out a questionnaire. Your access within the office will be limited.

What forms do you need to have before you can begin to prepare my taxes?

We MUST have your signed Engagement Letter before we begin to look at your documents. Other forms we prefer to have at the start are the Organizer, Organizer Checklist, Bank Information Form, and Taxpayer Information Form.

Please send the above named forms (**all colored forms**), along with the tax documents you currently have, to our office either through the portal or another method of your choosing. We prefer to receive our forms, including the Engagement Letter, when you have some documents to also send us.

If possible, please use the same method to get all of your forms and documents to us.

How will I get my documents to you?

To get your documents and Nelson CPAs forms to us, we prefer you to use our secure portals. If you have access to a computer and an email address, we request that you sign up for a portal if you haven't already.

Using our portals is easy and is the most secure way to get your confidential documents to us. To get a portal set up, email Mary Love at mlove@NelsonCPAsMN.com. More information regarding our portal is on Page 2.

What if I don't have a computer?

If you are not able to use a portal, you will need to send your documents to us through the U.S. mail or put them in our secure drop box located inside our vestibule area. The vestibule hours during tax season will be 8 a.m. to 8 p.m. Monday through Friday, and 9:00 a.m. to 5:00 p.m. on Saturday.

Please do not ring the doorbell and expect to talk with someone. If you have questions, include a note with your packet and we will give you a call.

How will I sign Form 8879 and other forms you need and get them back to you?

If you have a secure portal with Nelson CPAs:

- Your action items will be put in the "Action Required by Client" folder and your tax return will be put in the "Tax Return" folder in your portal.
- You will be able to download Form 8879 and the other forms needed, sign them, and then upload them to your portal.

If you do not have a secure portal:

- Your two-year comparison and the forms we need to e-file your 2020 return will be mailed to you. If you would like to review your complete tax return before we e-file it, please contact our office to make arrangements. Additional postage fees may apply.
- You will then need to sign the forms and return them to our office either by U.S. mail or put them in our secure drop box.

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How will I get my original documents back and a copy of my complete tax return?

If you use our secure portal, your complete tax return will be put in the "Tax Returns" folder.

If you do not use our portal system, your packet will be kept in our office until after tax season. Sometime in early May we will have a "curb-side pickup" where we bring your packet out to your car. You will be contacted via a Constant Contact email in late April regarding the days and the procedure. If you do not have an email, you will need to contact us sometime in the month of May to make arrangements.

CAPACITY RATHER THAN "DUE DATE"

For years we have given you a date by which you must have your tax documents to us to ensure we would get your tax return done by the April deadline. This year we will be using capacity as the determining factor.

We have determined approximately how much time it takes to prepare *your* return (every return is different) in addition to how many hours we have available to determine how many returns we can finish by April 15. Once we reach our capacity, we will continue to accept returns, but those arriving after our capacity has been reached will likely be extended.

If you are able to drop off some of your documents, but not all of them, we will move other clients ahead of you until we receive all of your documents.

How COVID-19 might change our capacity level

Our entire staff is taking precautions to avoid the coronavirus, however there are no guarantees. If a staff member tests positive, we will close the office entirely and work remotely for 10-14 days. As a result, it may be necessary to extend more returns than we anticipate. We will keep you informed and *appreciate your understanding*.

SIGN UP FOR A SECURE PORTAL

As previously mentioned, our preferred method for receiving your documents is through our secure portal system.

Once you have registered, you will be able to scan your documents (or take a picture of them with your smart phone using the Fast Scanner App) and then upload them to the "Information for Nelson CPAs" folder. Please be sure to use the .pdf format when uploading your documents. Your tax preparer will receive an automatic email notification when you have placed your documents in your portal.

When you need to sign documents, we will place them in the "Action Required By Client" folder and you will receive an automatic email letting you know action is needed on your part. Your completed tax return will already be in the "Tax Returns" folder.

Using our portal system is the most secure way to get your sensitive information to our office. Plus, it will save you a trip or two to our office or to the post office! Your original tax documents won't leave your house and you will easily be able to retrieve your tax returns should you need a copy in the future.

Fast Scanner App

To take a photo of your documents, install "Fast Scanner: Free PDF scan" app to your phone. Once the app is opened, center your phone camera over the document and take the picture. You can adjust the frame and/or the contrast before entering the document name. To send the pdf file, click on the share symbol, click on Export and choose your method. If you choose to email the pdf file directly to us, send it to: slee@NelsonCPAsMN.com.

STAFF UPDATES

Jody Glowaski retired in May 2020 after over 20 years working for Jodee Paape & Associates and then Nelson CPAs. Jody has been one of the friendly voices you have heard over the years.

Caroline Willis began in October as a staff accountant. She is a new graduate and is on her way to becoming a CPA. Besides bookkeeping, she will be working on after-the-fact payrolls and data entry for business and individual tax returns.

David Lindgren joined us in November. David is a seasoned CPA with 13 years in public accounting, eight of those years as a CPA. He is involved in the individual and business sides of Nelson CPAs.

Brian Blackard joined us in January. He has been a seasonal tax preparer with Nelson CPAs for the last two years and we are excited to have him with us as a year-round employee.

Jodee Paape and **Lynne Bates** continue to ease their way toward full retirement and have made the difficult decision to stop preparing individual and business tax returns. Jodee will continue to work with estates and trusts as well as our charitable gambling clients. She will also be available for fee based financial and tax planning.

Lynne will continue to be employed by NCPA, but will be performing administrative duties to assist the rest of the staff in completing the tax filing process.

CONTACT INFORMATION

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