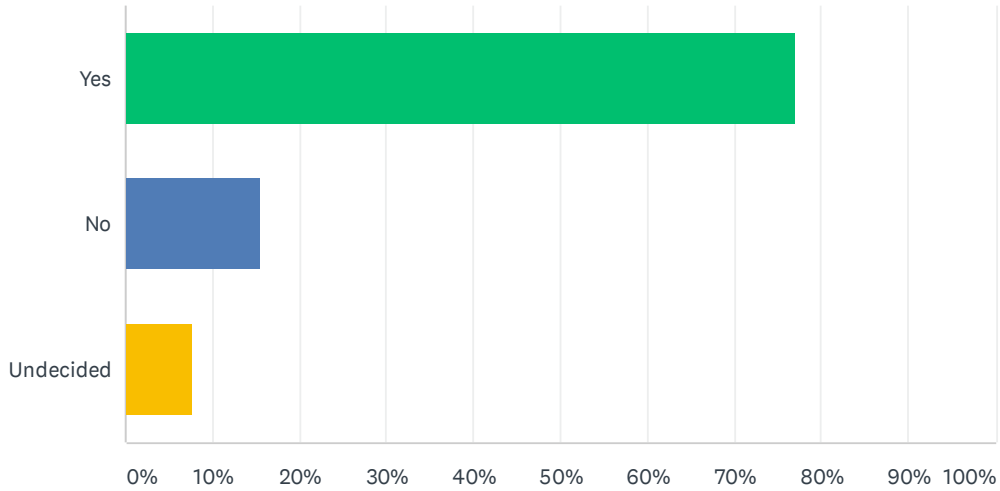


Q1 Is your firm currently or planning to allow staff to work remotely?

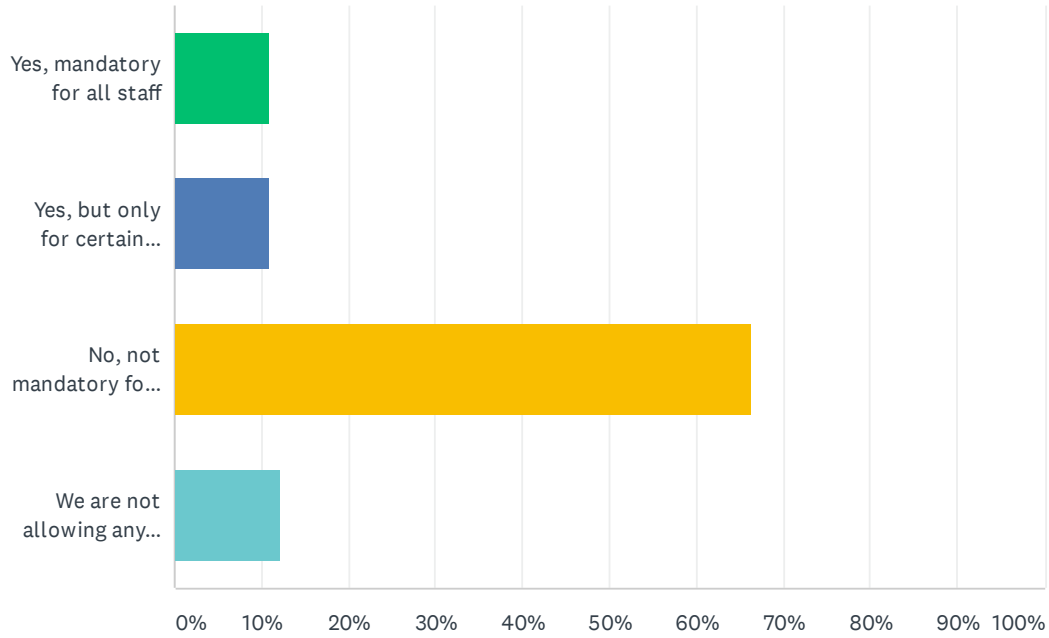
Answered: 78 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	76.92%	60
No	15.38%	12
Undecided	7.69%	6
TOTAL		78

Q2 If you answered "Yes" to Question 1, is working from home mandatory?

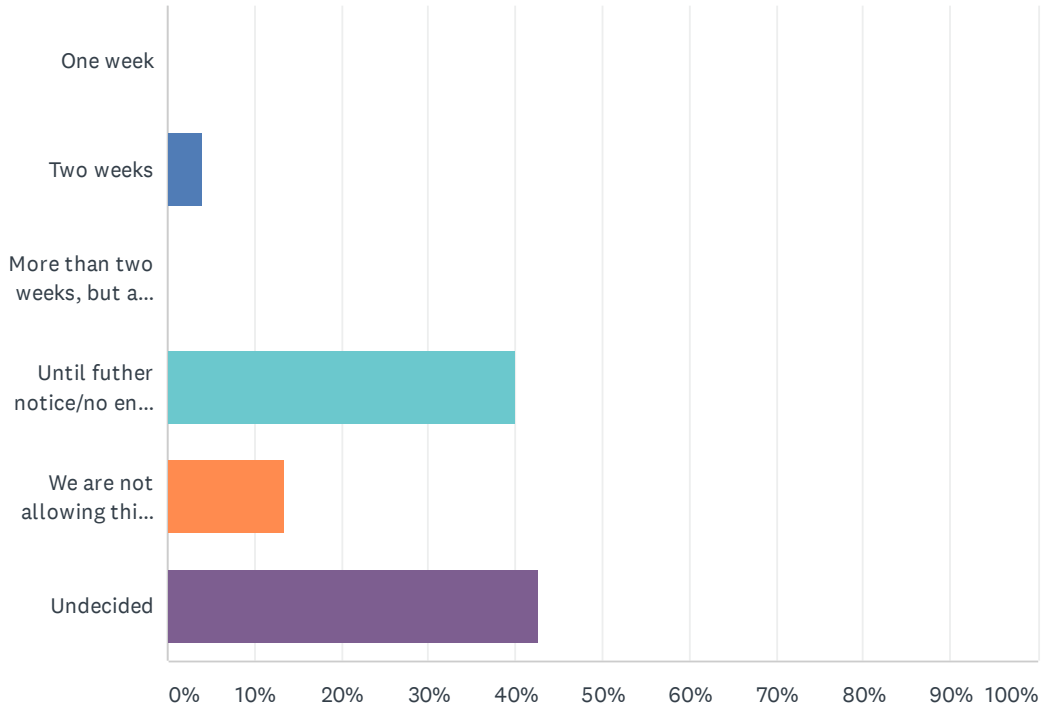
Answered: 74 Skipped: 4



ANSWER CHOICES	RESPONSES	
Yes, mandatory for all staff	10.81%	8
Yes, but only for certain staff	10.81%	8
No, not mandatory for all staff	66.22%	49
We are not allowing any staff to work from home	12.16%	9
TOTAL		74

Q3 How long are you allowing staff to work remotely?

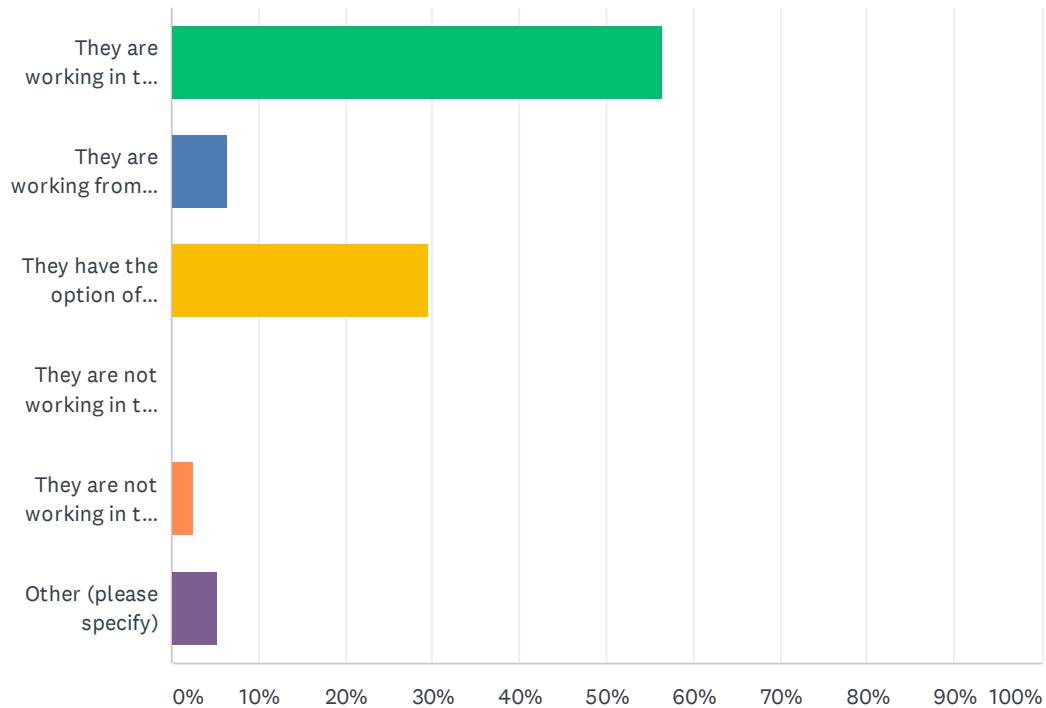
Answered: 75 Skipped: 3



ANSWER CHOICES	RESPONSES	
One week	0.00%	0
Two weeks	4.00%	3
More than two weeks, but a set end date	0.00%	0
Until futher notice/no end date at this time	40.00%	30
We are not allowing this in my firm	13.33%	10
Undecided	42.67%	32
TOTAL		75

Q4 How are you managing administrative staff?

Answered: 78 Skipped: 0

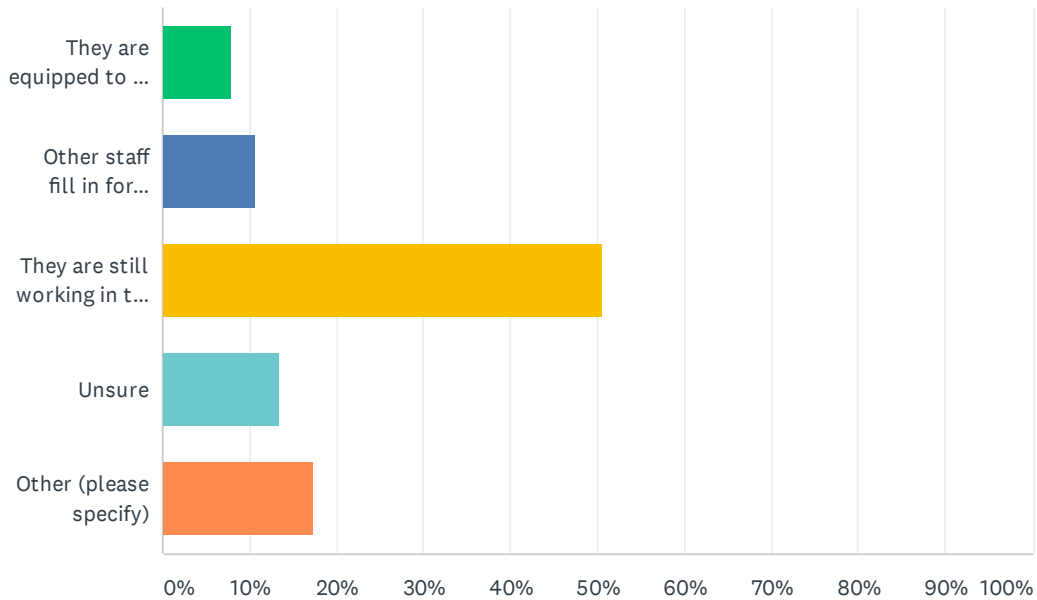


ANSWER CHOICES	RESPONSES
They are working in the office	56.41% 44
They are working from home	6.41% 5
They have the option of working from home or in the office	29.49% 23
They are not working in the office or from home, and taking vacation/PTO time	0.00% 0
They are not working in the office or from home, and they are not taking vacation or PTO time, but the firm is still paying their salary	2.56% 2
Other (please specify)	5.13% 4
TOTAL	78

#	OTHER (PLEASE SPECIFY)	DATE
1	periodically in office	3/14/2020 12:16 PM
2	Working in office only for essential functions (mail, scanning, sorting) for limited time as needed (only when there are items to be sorted/scanned for tax return processing); otherwise working from home and being paid full salary	3/14/2020 11:25 AM
3	We don't have admin. We do it all ourselves. Head chef and bottle washer	3/13/2020 7:41 PM
4	Sole proprietor. I handle all administration from my home office.	3/13/2020 5:49 PM

Q5 If your administrative staff is not working in the office, who is processing paper files and handling work that cannot be performed at home?

Answered: 75 Skipped: 3



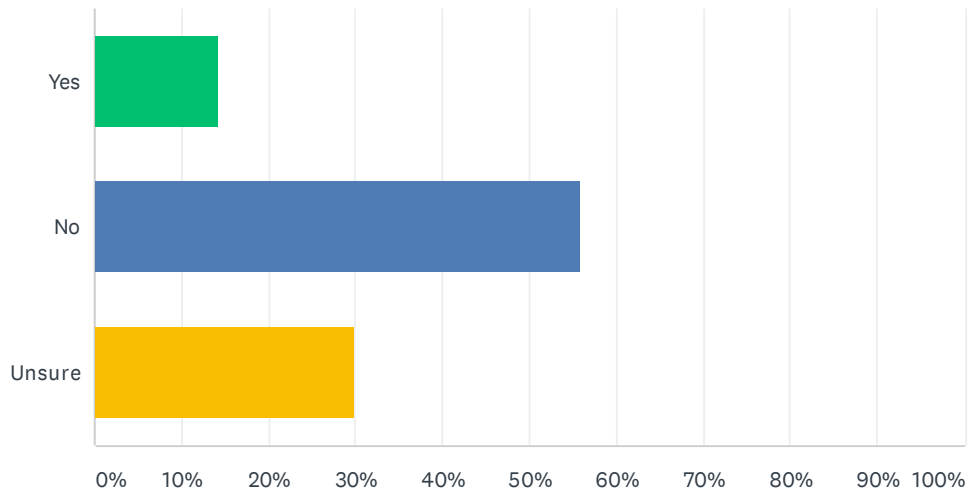
ANSWER CHOICES	RESPONSES	
They are equipped to do everything from home	8.00%	6
Other staff fill in for work that needs to be done in the office	10.67%	8
They are still working in the office	50.67%	38
Unsure	13.33%	10
Other (please specify)	17.33%	13
TOTAL		75

Managing Staff During Coronavirus

#	OTHER (PLEASE SPECIFY)	DATE
1	They are coming into the office for processing and working at home for other jobs	3/15/2020 3:50 PM
2	We do not issue any returns in paper format. We've been paperless for years. Client data comes in through the portal. Deliverables are made through the portal.	3/15/2020 3:12 PM
3	As a small practitioner, the principals are handling administrative tasks when necessary.	3/14/2020 5:09 PM
4	periodically in office	3/14/2020 12:16 PM
5	Admin staff coming in just for paper processing as needed	3/14/2020 11:25 AM
6	The Boss is doing what little paper returns we have. We have mostly electronic returns to a portal.	3/14/2020 11:08 AM
7	n/a	3/13/2020 7:59 PM
8	n/a	3/13/2020 5:49 PM
9	Work from office as needed.	3/13/2020 4:17 PM
10	we are still trying to determine how to handle this	3/13/2020 3:59 PM
11	Admin have the option to work from home but they have elected to come to the office	3/13/2020 3:44 PM
12	The office is open as of now	3/13/2020 3:37 PM
13	All are working remotely and those who are comfortable will come in periodically to address what cannot be done from home	3/13/2020 3:28 PM

Q6 Does your firm anticipate software speeds will slow down with staff working from home?

Answered: 77 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	14.29%	11
No	55.84%	43
Unsure	29.87%	23
TOTAL		77

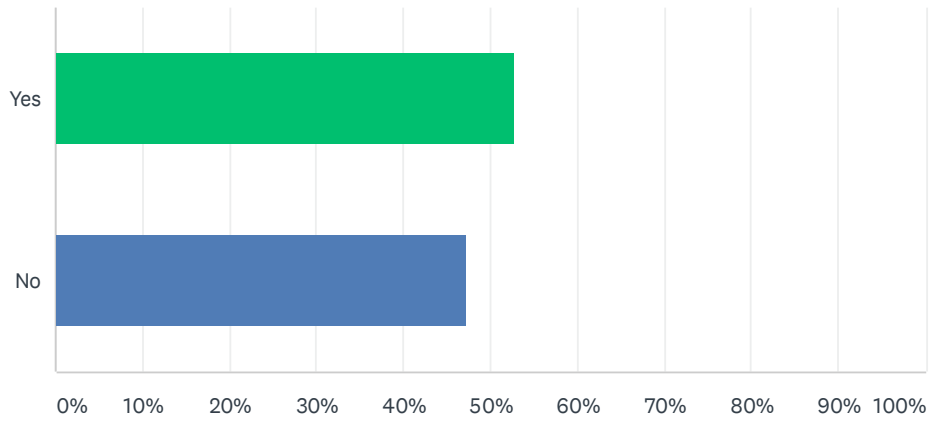
Q7 If you answered "Yes," how is your firm preparing to handle slower workflows during busy season?

Answered: 30 Skipped: 48

#	RESPONSES	DATE
1	Go with the flow	3/15/2020 3:50 PM
2	N/A as our team is already 100% virtual.	3/15/2020 3:12 PM
3	The best we can. We are being proactive with clients in planking for remote work.	3/15/2020 10:30 AM
4	Be Patient	3/14/2020 5:09 PM
5	na	3/14/2020 3:41 PM
6	Unsure	3/14/2020 10:10 AM
7	NA	3/14/2020 10:07 AM
8	na	3/14/2020 9:51 AM
9	WORKING WITH OUR IT COMPANY WHO ARE SO SLAMMED BROBABLY WON'T GET TO IT FOR WEEKS	3/14/2020 9:35 AM
10	N/a	3/14/2020 9:31 AM
11	Hoping for extension of filing deadline.	3/14/2020 9:12 AM
12	We will do the best we can.	3/14/2020 7:59 AM
13	N/A	3/14/2020 6:45 AM
14	We anticipate more overtime and are also assuming the 4/15 deadline will be extended.	3/14/2020 6:34 AM
15	can't control - hopefully team will figure it out as we go	3/13/2020 7:59 PM
16	unknown	3/13/2020 7:06 PM
17	n/a	3/13/2020 5:49 PM
18	N/A	3/13/2020 4:56 PM
19	N/a	3/13/2020 4:40 PM
20	Not applicable.	3/13/2020 4:17 PM
21	Not an issue	3/13/2020 4:00 PM
22	n/a	3/13/2020 3:50 PM
23	counting on tax extensions	3/13/2020 3:40 PM
24	N/A	3/13/2020 3:37 PM
25	N/A	3/13/2020 3:32 PM
26	NA	3/13/2020 3:31 PM
27	hoping the IRS and MA DOR will extend the deadline	3/13/2020 3:26 PM
28	use laptop version of tax software for prep	3/13/2020 3:22 PM
29	Unsure at this time	3/13/2020 3:22 PM
30	I don't know	3/13/2020 3:20 PM

Q8 Is your firm canceling or postponing in-person client meetings?

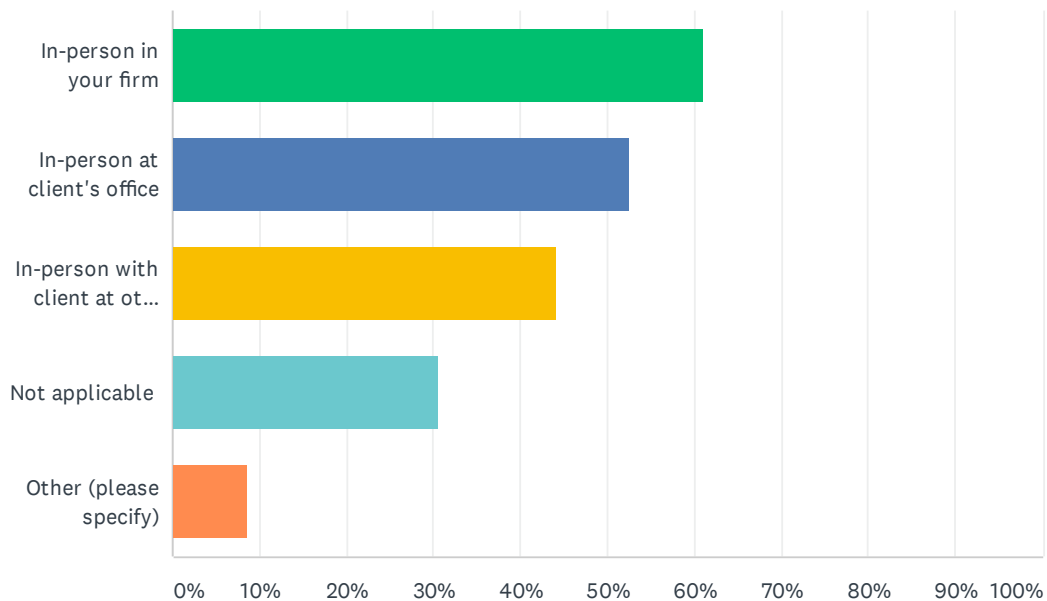
Answered: 76 Skipped: 2



ANSWER CHOICES	RESPONSES	
Yes	52.63%	40
No	47.37%	36
TOTAL		76

Q9 If you answered "Yes," please select all meeting types that are canceled or postponed:

Answered: 59 Skipped: 19

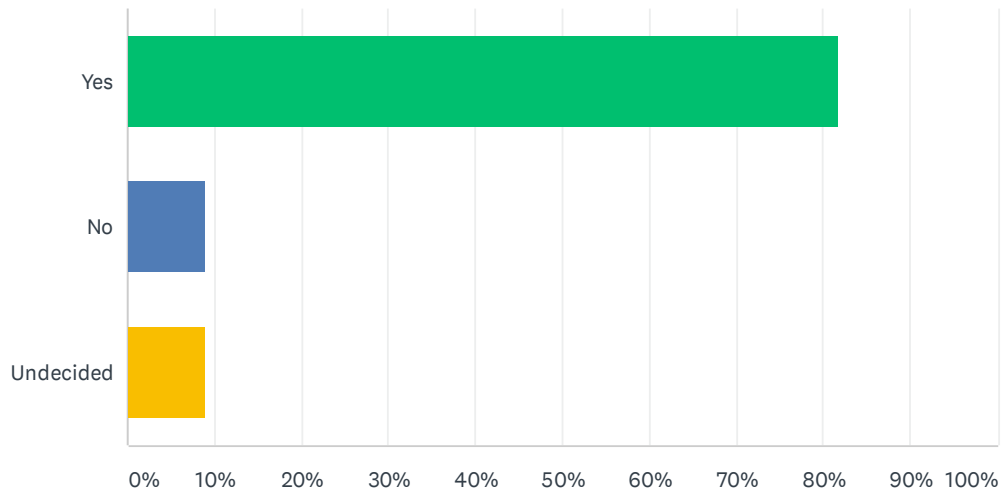


ANSWER CHOICES	RESPONSES
In-person in your firm	61.02% 36
In-person at client's office	52.54% 31
In-person with client at other location	44.07% 26
Not applicable	30.51% 18
Other (please specify)	8.47% 5
Total Respondents: 59	

#	OTHER (PLEASE SPECIFY)	DATE
1	Clients Option - encouraging drop offs	3/14/2020 9:18 AM
2	discouraging in person meetings; trying to do more phone meetings	3/14/2020 7:59 AM
3	We are not cancelling all meetings - selective and up to clients at this time	3/13/2020 7:59 PM
4	Most of our clients already upload their tax information to our portal. I've been meeting with clients at a local coffee shop, the local library and at WorkBar	3/13/2020 5:49 PM
5	There is some partner discretion but the objective is to have meeting remote as well	3/13/2020 3:28 PM

Q10 Will your firm offer virtual (i.e., conference calls, video calls, etc.) client meetings as an alternative to in-person?

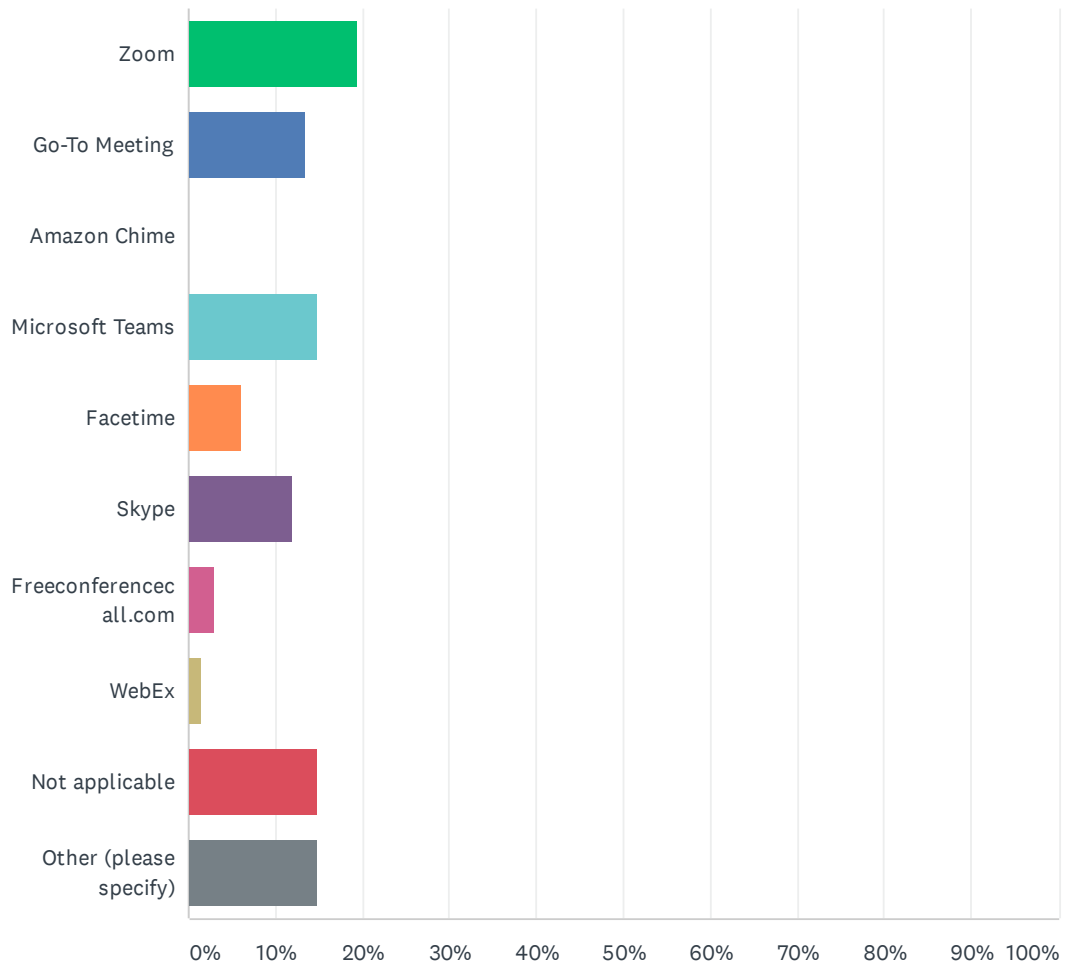
Answered: 77 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	81.82%	63
No	9.09%	7
Undecided	9.09%	7
TOTAL		77

Q11 If you answered "Yes," what software do you use to host virtual meetings?

Answered: 67 Skipped: 11



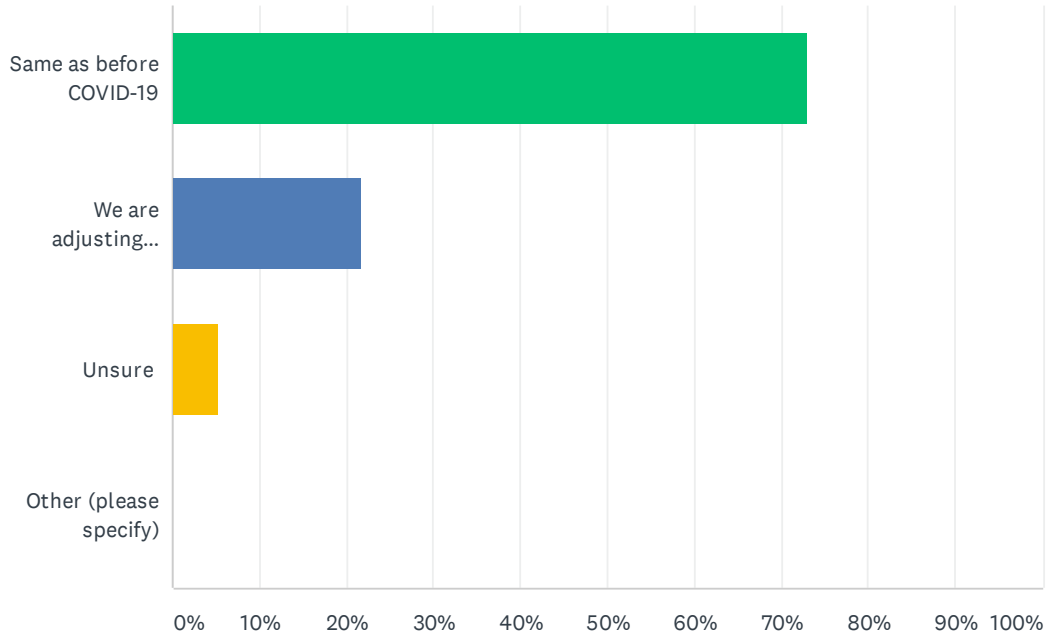
Managing Staff During Coronavirus

ANSWER CHOICES	RESPONSES	
Zoom	19.40%	13
Go-To Meeting	13.43%	9
Amazon Chime	0.00%	0
Microsoft Teams	14.93%	10
Facetime	5.97%	4
Skype	11.94%	8
Freeconferencecall.com	2.99%	2
WebEx	1.49%	1
Not applicable	14.93%	10
Other (please specify)	14.93%	10
TOTAL		67

#	OTHER (PLEASE SPECIFY)	DATE
1	Google Hangout Meets	3/15/2020 4:37 PM
2	Just phone calls for now	3/14/2020 3:15 PM
3	We are searching for one. Use go to meeting in the past.	3/14/2020 1:04 PM
4	RingCentral	3/14/2020 9:31 AM
5	Telephone calls	3/14/2020 9:12 AM
6	i use this new device called a telephone	3/14/2020 6:34 AM
7	Telephone conference	3/14/2020 4:40 AM
8	several choices teams/facetime/skype	3/13/2020 5:19 PM
9	logmein Rescue Join.Me	3/13/2020 3:57 PM
10	Ring Central	3/13/2020 3:46 PM

Q12 How is your firm dealing with impending deadlines and client communications?

Answered: 78 Skipped: 0



ANSWER CHOICES	RESPONSES	
Same as before COVID-19	73.08%	57
We are adjusting workflows and communicating with clients to manage expectations	21.79%	17
Unsure	5.13%	4
Other (please specify)	0.00%	0
TOTAL		78

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q13 What would you do if you found out someone in your office contracted COVID-19 or was exposed to someone who has it?

Answered: 66 Skipped: 12

Managing Staff During Coronavirus

#	RESPONSES	DATE
1	Self-quarantine, contact their doctors to get testing. Our work is already 90% virtual so we are not disrupted.	3/15/2020 4:37 PM
2	Try to contact everyone known to have interacted with that staff person	3/15/2020 3:50 PM
3	We work remotely already. COVID-19 hasn't disrupted our workflow. I have found that our client information inflow has slowed to a near stop in the past week though. People are scared.	3/15/2020 3:12 PM
4	Consult with proper authorities on next steps in terms of what to do / how to figure out who they've been in contact with / how to notify.	3/15/2020 10:30 AM
5	We would request the appropriate personnel be quarantined and work remotely.	3/15/2020 10:27 AM
6	Die	3/14/2020 9:10 PM
7	All staff would have to be quarantined according to the directive of the public health departments. We have contact information on hand to contact clients to inform them of such quarantine and expectations for completion of the returns.	3/14/2020 5:09 PM
8	have them stay home, deep clean the office.	3/14/2020 3:41 PM
9	Tell everyone to stay home for 15 days	3/14/2020 3:15 PM
10	Ask person take time off or work from home, if condition permits. Not sure, assessing the strategy.	3/14/2020 1:04 PM
11	Work from home right away and get necessary testing and treatment.	3/14/2020 12:28 PM
12	Alert the firm and self-quarantine for 2 weeks	3/14/2020 11:25 AM
13	Unsure	3/14/2020 11:08 AM
14	We had someone exposed to someone who was exposed. Neither have the virus but they are self-quarantining.	3/14/2020 10:43 AM
15	depends on the situation	3/14/2020 10:21 AM
16	unsure	3/14/2020 10:10 AM
17	dont know	3/14/2020 10:07 AM
18	close	3/14/2020 9:51 AM
19	Require them to stay home.	3/14/2020 9:40 AM
20	SEND EVERYONE HOME TO WORK FOR 2 WEEKS TO DO WHAT THEY CAN AND PROBABLY LOSE ALOT OF CLIENTS!	3/14/2020 9:35 AM
21	Shoot them	3/14/2020 9:35 AM
22	Communicate what we know to our staff	3/14/2020 9:31 AM
23	Close the office and work at home	3/14/2020 9:31 AM
24	Request that they go home first, get tested secondly and report the findings immediately.	3/14/2020 9:18 AM
25	Quarantine!	3/14/2020 9:12 AM
26	Obviously follow best practices for the safety of all; and insist on near 90% work from home policy, where admin staff can still process paperwork	3/14/2020 8:52 AM
27	certainly not allow them to come to the office, if they could work remotely that would be fine. The technology I have invested in allows us to work from anywhere with exception of the admin staff. The Policy right now is if you are worried or uncomfortable do what feels right for you and your family.	3/14/2020 8:39 AM
28	have everyone tested	3/14/2020 8:36 AM
29	Not sure.	3/14/2020 8:11 AM
30	follow cdc guidelings	3/14/2020 7:59 AM

Managing Staff During Coronavirus

31	send everyone home to be quarantined and tested	3/14/2020 7:59 AM
32	Since my entire staff work from home, we will monitor their health and react accordingly.	3/14/2020 7:58 AM
33	Work with authorities and follow their instruction, likely quarantining others who had contact.	3/14/2020 6:45 AM
34	ask them to work from home if asymptomatic, ask them to take sick days if they are ill, and see a doctor.	3/14/2020 6:34 AM
35	They would be sent home to limit exposure to the other 2 employees	3/14/2020 4:40 AM
36	We would need to notify work team and clients and probably close the office at that time	3/13/2020 7:59 PM
37	Monitor myself for symptoms. Call my primary care. Not panic	3/13/2020 7:41 PM
38	mandate quarantine procedures, notify people in contact with them, maybe quarantine whole office	3/13/2020 7:06 PM
39	That would be me. I would self-quarantine, notify my doctor, the town and any other govt. officials. Then I would notify all clients and other contacts that I met with for the past 2 months. I would also reach out to a peer to see if they could take over my tax / audit work in case I become too sick to do this myself. On a separate note, I'm thinking about what happened with Morris Robinson, z"tl, and his tax practice. I didn't know he was sick with cancer until I spoke to Yerechmial and learned that the business was shut down. I think the Society should establish a program that smaller practices could help cover each other in case of sickness instead of just losing the practice. (And having the business brokers sell the business isn't a good option in many cases.)	3/13/2020 5:49 PM
40	mandatory quarantine for that person	3/13/2020 5:19 PM
41	Communicate to staff, mandate working from home, communicating with clients by phone, disinfect the office, transition to electronic communications.	3/13/2020 5:05 PM
42	Yikes	3/13/2020 4:40 PM
43	Notify all employees and building management. Ensure other employees are assigned to the employee's responsibilities while they are quarantined.	3/13/2020 4:17 PM
44	Quarantine myself; ask employees to do the same. Notify clients in contact with the sick employee	3/13/2020 4:07 PM
45	We might have to make working at home mandatory or close the office for a period of time.	3/13/2020 4:00 PM
46	Mandatory quarantine FOR ALL in accordance with CDC GUIDELINES	3/13/2020 4:00 PM
47	Everyone stays home. Because of the size of the firm, I would let all the clients know that they will be going on extension for the April 15th deadline	3/13/2020 3:57 PM
48	time off; remote work	3/13/2020 3:50 PM
49	Immediately send them home. Notify all staff of the circumstances from a HIPPA perspective, contact building management. We also had a cleaning company come in to disinfect. Stay in touch with the employee for updates.	3/13/2020 3:46 PM
50	Quarantine & deep clean the office	3/13/2020 3:46 PM
51	Have them stay home and isolate themselves and get monitored by doctor. Then communicate to clients so I can manage expectations.	3/13/2020 3:45 PM
52	We are not sure - depends on circumstances but most likely close the office and sanitize it and then open to staff that wish to come to the office.	3/13/2020 3:44 PM
53	We would try to all get tested for COVID-19, although that doesn't seem to be very easy or likely possible at this time.	3/13/2020 3:43 PM
54	Send them home and let rest of staff know. Not sure what would be done about notifying clients.	3/13/2020 3:40 PM
55	Mandatory screening and work from home as well as sanitize office.	3/13/2020 3:40 PM
56	Ask the person to self quarantine ask others to get tested	3/13/2020 3:40 PM

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57	Follow the protocol provided by the CDC	3/13/2020 3:32 PM
58	email the team	3/13/2020 3:31 PM
59	We would ask for a self-quarantine at home and to document a trace of where the person had been since the time of exposure. We would notify all who came in contact with our employee. Other employees would be asked to self-quarantine as well.	3/13/2020 3:28 PM
60	Close the office and make work from home mandatory for all.	3/13/2020 3:27 PM
61	evacuate the staff immediately and any business owners concerned about their risks would be expected to leave.	3/13/2020 3:26 PM
62	We would likely ask the team member who was exposed to work remotely for two weeks and if someone did contract covid-19, we would probably close the office.	3/13/2020 3:26 PM
63	no	3/13/2020 3:24 PM
64	make them stay home	3/13/2020 3:22 PM
65	Ask them to self quarantine, get tested as soon as possible.	3/13/2020 3:22 PM
66	Everyone self quarantine	3/13/2020 3:20 PM