

Accounting Services for Local County Government

PROJECT DETAILS

 Accounting services

 Jan. - Mar. 2021

 Less than \$10,000

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“Whenever we had a question or needed something, there was always a person from their team available for us.”

PROJECT SUMMARY

A local county government hired Tab Service Company to provide back-office services. They took over the filing work for almost 2,000 1099-G forms due to the client's lack of resources to complete them.

PROJECT FEEDBACK

Tab Service Company led a responsive process where they were always available for the client's needs. They collaborated with the client to ensure the overall quality of the work delivered. The client felt that Tab Service Company took a weight off their shoulders thanks to this engagement.



The Client

Introduce your business and what you do there.

I'm the audit manager of information systems of a local county government established in Texas.

The Challenge

What challenge were you trying to address with Tab Service Company?

The federal government provided funding to state and local governments to provide stimulus assistance to our constituents. The treasury service changed its guidelines and requirements through the course of giving that money out, which required the counties to issue 1099-G for any grant money that was going to be passed on.

We didn't have the resources to produce those 1099-G forms on top of our normal responsibilities, so we contracted Tab Service Company to provide that service for us.

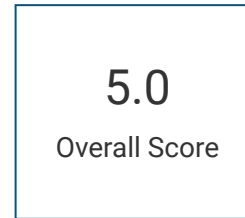
Senior Internal Auditor, Local County Government

Government

1,001-5,000 Employees

Fort Worth, Texas

CLIENT RATING



Quality: 5.0

Schedule: 5.0

Cost: 5.0

Would Refer: 5.0



The Approach

What was the scope of their involvement?

Their services included printing the 1099-G and mailing them to the individuals who needed to receive them, along with filing with the IRS. We had 1,719 1099-G forms that needed to be processed, and they had a simple process to upload the files to a secure FTP site. We uploaded the files, and they sent us back results through that same site where we were able to download and review them.

After that, we made a few changes and uploaded them back so they could print them with our authorization. In the end, they confirmed to us that the file was mailed, along with a PDF document of all the files that they sent out. We then were able to answer any questions from the grant recipients.

What is the team composition?

We worked with Matt (Director of Business Development) and Meg (VP). We also worked with Tabitha (Bookkeeper) for all of our invoicing and billing requirements.

How did you come to work with Tab Service Company?

They were contracted through our purchasing department, so they were used for other services before.

How much have you invested with them?

So far, we've spent \$807.93 with them.

What is the status of this engagement?

We worked through January 2021–March 2021.



The Outcome

What evidence can you share that demonstrates the impact of the engagement?

It was a minimal cost, but it was a good service because it took that off our plate.

How did Tab Service Company perform from a project management standpoint?

We primarily communicated through email. We had a couple of phone calls, but email was the best way for us to communicate., That way, everyone was able to get back at their convenience.

What did you find most impressive about them?

They were responsive. Whenever we had a question or needed something, there was always a person from their team available for us.

Are there any areas they could improve?

I don't think there's anything that they can improve.

Any advice for potential customers?

Establish contact at the beginning of the engagement—that way it's easy to have back-and-forth feedback.

