



EMPLOYEE/OFFICE CHECKLIST

OFFICE INFORMATION	
Branch Number:	
Name:	
Manager Name:	

To Complete:	
<input type="checkbox"/>	Tax kit items are displayed
<input type="checkbox"/>	2024 PTINs have been renewed or obtained
<input type="checkbox"/>	Everyone knows their login information for the tax software and check printing
<input type="checkbox"/>	Tax Modules including the certification module in DayForce are completed with the certificate printed and displayed
<input type="checkbox"/>	Complete 3 out of the 6 practice problems by December 20 th
<input type="checkbox"/>	Call the past 3 years tax customers by December 20 th
<input type="checkbox"/>	Partner with 3 businesses for taxes by December 20 th , if required by DM
<input type="checkbox"/>	Complete 25 Taxpayer Interview sheets or send 25 Portal links
<input type="checkbox"/>	Attend a live webinar on __ Bank Fees vs. Prep Fees __ Create a Return __ Portal and App
<input type="checkbox"/>	Review tax goals with the District Manager