



Office Checklist

The office manager will oversee and confirm that each of these are done. Keep for office records.

OFFICE INFORMATION	
Branch Number:	
Manager Name:	
Manager Signature:	

COMPLETED	
<input type="checkbox"/>	Received Tax Kit
<input type="checkbox"/>	Where applicable, hang tax banner outside.
<input type="checkbox"/>	All employees have renewed or obtained their 2024 PTIN (Instructions on ATS website)
<input type="checkbox"/>	Everyone knows their login information for the tax software and check printing
<input type="checkbox"/>	Each employee doing taxes has finished their individual certification
<input type="checkbox"/>	Print and display training certificate for each employee after training has been completed
<input type="checkbox"/>	Set goals and make a plan with District Manager
<input type="checkbox"/>	Call last 3 years tax customers before December 31st
<input type="checkbox"/>	Partner with 3 businesses for taxes before December 31 st
<input type="checkbox"/>	Print Taxpayer Information Sheets and get Tax Envelopes ready to have them on hand to give out to prospective tax clients.
<input type="checkbox"/>	Talk to customer about tax services, promotions, and new products being offered (i.e. Tax Advance)