<u>A designated Tax drawer should be set up for 2022 taxes. This cabinet should be able to lock!</u>
Make sure you have a folder for each return

SEASON:
The Tax Customer wants you to prepare their return
CREATE A TAX FOLDER: This folder should include:

- Income information and other forms received
- Taxpayer File Checklist
- SS Card copies if received
- Interview sheet filled out and signed by customer
- Due diligence sheet filled out and signed by you
- All additional notes you have about the return

- Enter Taxpayer information into program
- Let them know about their options to receive their funds and the
    - ADVANCE
    - AUDIT PRO
- Quote refund AFTER Fees
- Any questions use live chat
- Taxpayer signs
- Submit to ATS

AFTER SUBMITTING:

- Check status regularly
- If rejected fix and resubmit
- After accepted by the IRS print the return and call the customer
- Login to check printing and print available checks
- After printing call the customer to let them know you have a check for them
- Have customer sign the check stub and put in their tax file
- Remind customer to refer friends and family

<u>Setting up your Files</u>

In the front of the drawer should be a section for "Pending" tax returns (that are waiting on checks or waiting to pick up checks).

Behind the Pending files, should be your "Completed" files.
(All documents are in order and all money picked-up.)

- All files should end up in "completed" at the end of the season.
- Make sure to check these daily, we do not want printed checks sitting in their files and we forget to make a 2nd call! (Usually small state checks, etc.)