



SUPPORT PROCEDURES

ATS and Sun Loan have implemented a support process to ensure that we are aware of any situation immediately.

The office will use Live Help for initial contact. The office can always request a phone call. If the office is not satisfied, they should speak with their district manager. The district manager should call either Doug or William. We will speak with the office to resolve the issue immediately.

Depending on what regional manager your District manager reports to, the District manager will contact either William or Doug. All District managers have their direct phone number.

William:

Tammy Asbridge
Kelly Weise
Holly Munoz
Christina Parmele

william@accuratetaxsolutions.com

Doug:

Chuck DeLeon
Rosie Arellano
Javier Au
Gloria Ortiz
John Gallardo

doug@accuratetaxsolutions.com

Chat:

ATS Live Help should always be your first contact for information concerning a tax return. It is the fastest and quickest way to get the correct answers for your customers.

However, every question cannot be answered via chat. Specific questions are sometimes better answered with a phone call. When communication is breaking down, we will always call office.

Immediate Needs:

All District managers and Regionals have William's and Doug's direct numbers for immediate response to any issues.

Phone Support:

ATS will call the store:

- When requested
- When there is some confusion in the office or at ATS concerning the questions or answers received.

1099 NEC - Self Employment Income Procedure:

Each situation will be handled on an individual basis:

- The tax return submitted to ATS will be reviewed.
- If there are red flags, we will call office immediately to let them know what needs to be brought back in and why.
- Internal file at ATS started with what was requested and what was received.
- After 48 hours we will call the office concerning returns that have outstanding requests until all information is received and return is ready to be filed to the IRS.

Refund Change:

After ATS reviews the return and there is a refund amount change we will contact the store for approval before submitting the return to the IRS.