

# TAX SEASON READINESS: WORKFLOW CHECKLIST

## HOW CONFIDENT ARE YOU THAT YOUR FIRM IS PREPARED FOR WORKFLOW DEMANDS OF TAX SEASON?

	<u>Not at all confident</u>	<u>Not confident</u>	<u>Confident</u>	<u>Extremely confident</u>
We follow firm-defined workflow for tax processes with measures (or technology) in place to ensure the standardized way is followed.				
We schedule workflow.				
Staff and partners will know at all times during tax season what they are supposed to be working on.				
We have the ability to schedule and manage staff and reviewers including their capacity of work, for any reason (e.g. bottleneck, resources available, due date at risk, cost, etc.).				
Assign work based on any factors (e.g. skills, expertise, client, staff pay, etc.).				
We will know, in real-time, where each project is at.				
We have the ability to print directly from any tax software we use into your digital engagement or storage system.				
Our scanner, OCR and scanning tools are set up to ensure we can work digitally so that we are not managing paper this tax season.				
We can easily deliver tax documents in any format our clients prefer (e.g. paper, secure email, web portal).				
All documents relating to a specific project will be stored and worked on in our engagement software.				
We have gathering tools that ensure it is easy to gather documents from a variety of sources such as paper, email, web portal and scanner.				
Our PDF Editor has markup tools tax professionals' need (e.g. tick marks, calculator tape, signatures).				
We have the software needed to measure and analyze budgeted time to actual time spent on each section of a project.				
Every word and every number in our engagement and storage software is fully searchable for quick reference.				