

# Tax Season Readiness

## Document Management Checklist

### RATE YOUR FIRM'S READINESS TO HANDLE TAX SEASON WORK

Never

Occasionally

Almost always

Always

#### GATHER

Clients use your Web portal to deliver documents for tax work.

Staff can scan and upload documents from a mobile phone or tablet.

Scanned documents are fully searchable.

Document naming is consistently applied to all documents gathered for tax work.

#### PROCESS

Every document is scanned up-front, before processing begins.

Electronic project binder is well-organized, making files easy to find.

Documents in the system are kept in their native file format while tax work is being done, allowing staff and partners to work in a familiar way with existing software.

Client files are digital and centrally accessible.

Client files can be accessed by multiple staffers simultaneously.

PDF Editor has tools like tickmarks, signatures and a calculator with a notated tape that can be pasted to a work paper.

Can work on multiple projects at the same time easily copying documents between projects.

Tax returns can be printed to PDF and filed into the DMS without any intervention.



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## RATE YOUR FIRM'S READINESS TO HANDLE TAX SEASON WORK

Never

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Always

### STORE

We store files digitally.

We have a simple indexing structure for our digital files.

Files are stored using uniform naming conventions.

Files are stored in a permanent, easy-to-share file format that is easy to share with clients, such as PDF.

Our digital storage solution alerts us to remove documents that have reached the end of their required retention period.

Document retention rules are applied to documents based on document type, as documents stream into the firm for tax work.

Stored files are static and cannot be moved or deleted.

Every word and number of every document is fully searchable.

### DELIVER

Staff or partner(s) can instantly access and deliver a client's file or any document.

We deliver tax returns to clients using a Web portal.

We use eSignature software to collect digital client signatures

**Your firm is operating at its most efficient when "Always" is your answer choice. If you selected *Occasionally, Almost Always* or *Never* in this checklist, now is the time to investigate Doc.It Suite document management and workflow software.**

- Contact sales (888-693-6248 Ext. 1)
- Join a webinar <http://www.doc-it.com/webinars/>
- Take a first step into Document Management with Doc.It Explore: <https://www.doc-it.com/explore/>
- Doc.It Connect: Secure portal to gather, share and sign documents: <https://www.doc-it.com/connect/>



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